



CLASSIFICATION NO. 095

Established: 1/93

Revised: 12/07, 5/18

FLSA: Exempt

EEO: 2

BUDGET MANAGER

CLASS CHARACTERISTICS

Under direction, to plan, organize and manage the activities of the Budget Office; to develop and administer the County's budget; to provide capital budget planning and development; to provide financial planning and long-range forecasting; to ensure the County meets the requirements of Oregon Local Budget Law as defined in Oregon Revised Statutes Chapter 294; and to perform other work as required.

DISTINGUISHING CHARACTERISTICS

The Department of Finance, through its Finance Division, provides financial administration of the County's governmental operations. Areas of responsibility include budgeting, payroll, general accounting including accounts payable and receivable, grants administration, debt management, cost allocation, financial reporting, coordination of the annual financial audit, and procurement. The Facilities Management Division is also part of the Department of Finance and provides services to County departments.

The Budget Manager is a single incumbent classification responsible for the management, direction, and integration of comprehensive budget planning services for the County and its service districts, which include the development, implementation, and administration of the annual budget. The incumbent is responsible for developing and analyzing performance measurement systems, performance-based budgeting, and financial forecasts. The incumbent also oversees the online budget management system, ensuring the accurate processing and maintenance of records regarding budget activities for the County and its service districts.

The Budget Manager reports to the Director of Finance and receives regular direction from County Administration to provide particular information or analysis in service of furthering budget development and policy and in developing and presenting the annual budget proposal to the County Budget Committee and the Board of County Commissioners.

TYPICAL TASKS

Duties may include but are not limited to the following:

1. Plans, organizes, develops, integrates and evaluates the work of the County Budget Office and staff; develops, implements and monitors work plans, programs, processes and systems to achieve strategic plan goals, objectives and performance measures in keeping with the County's core values; directs the development of the Budget Office's program budget and monitors performance against that plan.
2. Manages and coordinates the annual County budget process; reviews, analyzes and makes recommendations on department funding requests; prepares statutory budget forms;

compiles and publishes the annual budget documents; submits reports for review to state and national regulatory agencies and professional organizations.

3. Coordinates County-wide activities and personnel engaged in capital budget development, preparation and administration; provides advice to all County departments and service districts on budget preparation and budget management issues; provides staff support to the Budget Committee and coordinates quarterly Budget Committee meetings; coordinates citizen outreach process to promote access for citizen input for the budget process.
4. Oversees budget administration throughout the fiscal year under direction from the Finance Director and County Administration; assists County departments in preparing, administering and reporting on budgets; coordinates the processing of budget amendments; monitors actual activity in relation to projections; researches and analyzes budget histories to project future revenues and expenditures; prepares long-range financial forecasts; monitors capital improvement plans and forecasts; analyzes, develops, and reports findings, alternatives and recommendations involving a broad range of revenue, financing and financial planning issues.
5. Participates in the assessment, development, and implementation of a financial management software system, including the budget interface for encumbrance-based accounting; participates in the development, implementation and evaluation of manual and automated budget accounting systems and controls; and oversees process improvement and automation efforts for the budget process; provides leadership in development and implementation of financial policies related budget and debt management.
6. Provides support to the Director's Office and County Administration in assessing the budget impact of proposed legislation and ballot measures; analyzes, suggests, and reports on changes to Oregon Revised Statutes Chapter 294; participates in governmental activities to influence legislation and regulatory change consistent with the County's interests and needs; represents the County with other governmental agencies and professional organizations.
7. Analyzes economic and demographic data, fiscal operations, income, costs and financial obligations to determine trends affecting County departments, residents and businesses; forecasts future revenues and expenditures; prepares and reviews financial statements and reports; researches and abstracts technical data, legal requirements and County policies.
8. Develops, reviews, monitors, and evaluates indirect costs and the cost allocation plan to determine true cost of services and maximize reimbursement from appropriate sources, in compliance with federal regulations and in coordination with the Grants Office.
9. Hires and supervises professional staff to provide high quality service to citizens and County staff in support of the established goals, objectives and service expectations; plans, directs, monitors and evaluates the performance of staff; establishes performance requirements and professional development targets and provides coaching for performance improvement; provides employee recognition; recommends and administers progressive discipline; conducts and/or facilitates budget staff training and development programs; promotes cooperative team efforts among staff and with other County departments.

REQUIRED KNOWLEDGE AND SKILLS

Knowledge of: State of Oregon local budget laws; research methods and statistical and financial analysis techniques; principles and practices of public administration; software applications for

accounting and budgeting systems; federal, state and local statutes, best practices, rules and regulations applicable to governmental budget and accounting; principles and practice of effective management and supervision; principles, practices, methods and techniques of budgeting for capital improvements and operations of public agencies; and principles and practices of public agency capital financing.

Skill to: Plan, direct and integrate a variety of complex financial planning and budgeting programs and activities; evaluate budget programs and make recommendations for improvement; define complex budgeting issues, perform difficult and complex analyses and research, evaluate alternatives and develop sound conclusions and recommendations; understand, interpret, explain and apply County, state, and federal policy, law, regulation, and court decisions applicable to areas of responsibility; analyze, interpret and explain proposed legislation in terms of budgetary impact on the County's short term and long term financial planning goals and objectives; make oral presentations of proposals and recommendations clearly, logically, and persuasively; prepare clear, concise and comprehensive budgetary financial statements; exercise sound, expert judgement within general policy guidelines; direct staff in continuous efforts to improve quality, productivity and effectiveness; and establish and maintain effective working relationships with all levels of County management, other governmental officials, and County staff.

MINIMUM QUALIFICATIONS

Minimum qualifications are used as a guide for establishing the minimum experience, education, licensure, and/or certifications required for employment in the classification. The following minimum qualifications are established for this classification. Additional minimum qualifications and special conditions may apply to a specific position within this classification and will be stated on the job announcement.

Experience: A minimum of eight (8) years of related experience that would provide the required knowledge and skills to perform the responsibilities of this position.

Licenses/Certifications: None Required.

PRE-EMPLOYMENT REQUIREMENTS

Must successfully pass a criminal history check which may include national or state fingerprint records check.

Driving may be necessary for County business. For position(s) with occasional/incidental driving, incumbents must possess a valid driver's license. Accommodation requests for an acceptable alternative method of transportation will be reviewed on an individual basis in compliance with State and Federal legislation. For position(s) with regular driving, incumbent(s) must also possess and maintain an acceptable driving record throughout the course of employment.

Edited: 8/19