



## **BUDGET/FINANCE SPECIALIST Classification Specification Non-Represented General**

*Class specifications are only intended to present a descriptive summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications **may not include all** duties performed by individuals within a classification. In addition, specifications are intended to outline the **minimum** qualifications necessary for entry into the class and do not necessarily convey the qualifications of incumbents within the position.*

### **DEFINITION:**

Under general supervision, performs complex technical budgetary functions and administrative support by coordinating and assisting in the development, preparation, administration, maintenance, review and control of the City's annual capital and operating budgets; provides consultative budget service to department and staff management. Performs accounting support and record-keeping work in the preparation, processing and maintenance of accounting and financial records; provides accurate information related to availability, accessibility, appropriateness of funding sources; and performs related duties as assigned.

### **DISTINGUISHING CHARACTERISTICS:**

The Budget/Finance Specialist is the general level class responsible for maintaining ongoing or recurring projects such as statistical reports, surveys, etc. and a variety of complex administrative support duties. This classification is distinguished from accounting classifications by the incumbent specialized knowledge of preparation, coordination, administration and control of the City's annual capital and operating budgets.

### **SUPERVISION RECEIVED/EXERCISED:**

General supervision is received from the Assistant City Manager/Management Services, Budget/Finance Manager and/or designee. Incumbents may exercise technical and functional supervision over lower level staff.

**ESSENTIAL FUNCTIONS:** *(The following is a typical list of duties assigned to the Budget/Finance Specialist. The duties included in this list are examples and are not intended to be all-inclusive or restrictive.)*

- Participates, coordinates and facilitates in the preparation, development and production of the annual operating and capital improvement budgets.



- Researches, monitors, reports and prepares projections on budget expenditures; processes requests for budget adjustments and institutes fund transfers; reviews and verifies budget accounts, purchase orders, and bidding documentation; verifies and makes budget and expense adjustments.
- Advises and assists managers and staff in researching and preparing the operating and capital improvement budget requests.
- Answers questions and prepares special reports for department use in budget tracking and reporting; compiles budget documents and data for management and staff review; participates in developing long-range financial forecasts and analyses.
- Assists department staff in researching and reviewing departmental financial records and reports.
- Compiles, composes, proofreads, and edits reports, documents, correspondences, forms, meeting notes, budget narratives and statistical documents; selects appropriate document formats; researches, compiles, and analyzes information necessary for document composition, meetings, presentations, projects and reports.
- Reviews invoices, travel expense requests and payment documentation for accuracy and proper coding; processes invoices for payment; answers questions from vendors regarding invoice and payment status; processes purchase orders and requisitions for supplies and service.
- Maintains fiscal records for audits and compliance with local, county, state and federal agencies.
- Responds to questions and concerns from the public, other departments, employees and management; provides information as is appropriate and resolves concerns.
- Corresponds and coordinates activities with other City departments, public and private agencies.
- May provide lead supervision for other clerical staff, which may include assigning, scheduling and prioritizing work; provides training to less experienced staff.
- Performs other related and peripheral duties as required and necessary for the successful performance of this job.

**QUALIFICATIONS:** *(The following are minimal qualifications necessary for entry into the classification.)*

**Education and/or Experience:**

Any combination of education and experience that has provided the knowledge, skills and abilities necessary for a Budget/Finance Specialist. A typical way of obtaining the required qualifications is to possess two (2) years of responsible administrative support experience and the equivalent of three (3) years of related experience in accounting, financial and statistical record keeping, and a High School diploma or GED. A Bachelor's degree in accounting or related field is desirable.



**License/Certificate:**

Possession of, or ability to obtain, a valid Class "C" California driver's license.

**KNOWLEDGE/SKILLS/ABILITIES:** *(The following are a representative sample of the KSA's necessary to perform essential duties of the position.)*

**Knowledge of:**

City and subsidiary districts budgetary and related policies and procedures; the City's Chart of Accounts and general funding sources; principles and practices of governmental budgeting; basic research, budget monitoring and control methods; accurate financial and statistical record-keeping techniques; accounting and budget practices and procedures; administrative support, office and budget methods; business correspondence, report writing; ability to deal with a variety of City staff and elected officials; use independent judgement; maintain confidentiality; interpersonal skills using tact, patience and courtesy; modern office equipment including a computer and applicable software programs related to current work and other programs including but not limited to Microsoft Word, Excel and PowerPoint; proofread and correct oral and written communication usage in English, grammar, spelling, punctuation and vocabulary.

**Skill to:**

Operate an office computer and a variety of word processing, spreadsheet, and software applications.

**Ability to:**

Operate a computer, calculating machine, cash register and other standard office equipment; organize, set priorities and exercise sound judgment within established guidelines; interpret, apply and make sound decisions in accordance with laws, rules, regulations and department procedures; understand program objectives in relation to departmental goals; research regulations, procedures and/or technical reference materials; use discretion in dealing with the public and handling of sensitive information; determine the appropriate course of action in emergency or stressful situations; prepare narrative and statistical reports; secure cooperation and teamwork among professional and/or support staff; plan and organize to meet schedules and timelines; maintain records; compare numbers and detect errors efficiently; make calculations, and tabulations and review fiscal and related documents accurately and rapidly; understand and carry out written and verbal instructions; prepare clear and accurate financial records and reports; work effectively and courteously with City staff and the public in person and by telephone; work independently.

**WORKING CONDITIONS:**



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Position requires prolonged or intermittent sitting, standing, walking on level, uneven, or slippery surfaces, reaching, twisting, turning, kneeling, bending, stooping, squatting and crouching. The position also requires grasping, repetitive hand movement and fine coordination in preparing reports and using a computer keyboard in the performance of daily duties. Additionally, the position requires near and far vision when reading correspondence and using a computer and acute hearing is required when providing phone service and communicating in person. The need to lift, carry, push, and pull files, reports and other materials weighing up to 40 pounds is required. The employee may occasionally be required to travel to different sites and locations; when working outdoors the incumbent may encounter extreme weather conditions, including wet, hot, cold, wind, snow, ice, and heavy vehicle traffic. The noise level in the work environment is usually quiet to moderate when indoors and moderate to loud when outdoors. Must be available for night and weekend work as required.

Adopted/Approved February 2017