

**LAKE COUNTY
POSITION DESCRIPTION**

TITLE: ASSISTANT BUDGET MANAGER

DUTIES

GENERAL FUNCTION

The general function of the position within the organization is to perform complex work related to identifying and maximizing budget resources, both new and existing, in order to create a highly effective budget; collects, reviews, and analyzes data that is used in the budget planning process. This position is under general direction.

PRIMARY DUTIES: *This list represents the essential functions performed by the position. Employees may be assigned additional duties by management as required.*

Assist with the development, maintenance and monitoring of the county's operating budget.

Works with the Deputy Finance Director, Administrators and Department Heads to proactively incorporate the expenditures into the operating budget on an regular basis; monitor expenditures to ensure compliance with approved budget; and makes financial forecasts as requested.

Responsible for significant financial and management analysis and review; creates automated reports, spreadsheet templates, and other tools to conduct financial enterprise resource management.

Supervise, plan and coordinate fiscal and financial operations; develops and implements procedures and technical process; makes recommendations concerning fiscal policies; and ensures the preparation and maintenance of financial records and reports.

Supports multi-year budget development and analysis, monitors year to date budget performance, and reports on financial planning as directed.

Analyzes and communicates emerging budget trends and deficits on a timely basis to budget administrators.

Provides problem-solving assistance to departments as needed; keeps senior management apprised of significant budget trends, deficits, and surpluses.

Develops standardized and specialized reports to support the budget monitoring objectives.

Compiles departmental budget information for high-level analysis as needed.

Supervise budget and research analysts.

Leverages the Hyperion budget software in the administration of position management and discretionary budgets; provides back up support for routine Hyperion budget maintenance; develops ad hoc reports from the Hyperion budget software in Smartview.

Performs periodic testing of budget functionality within the Oracle General Ledger as needed for software upgrades and patches.

Prepare the annual county budget message for county board approval; and prepares instructions to county departments on budget preparation, budget policy and goals.

Receive completed budget requests from departments; analyzes requests to determine conformance to instructions and budget policy and the impact on overall county expenditures; and assists county administrator and county board committees in reviewing requests.

Provide technical assistance on operating requirements, fiscal procedures, and budget requests.

Conduct management reviews of departmental operations for improved efficiency.

Manage purchasing functions for the department; develops purchasing, receiving and inventory procedures; and ensures compliance of the same.

Manage the county's performance measurement system.

All other related duties as assigned.

GENERAL RESPONSIBILITIES AND REQUIREMENTS

DATA RESPONSIBILITY: *"Data Responsibility" refers to information, knowledge, and conceptions obtained by observation, investigation, interpretation, visualization, and mental creation. Data are intangible and include numbers, words, symbols, ideas, concepts, and oral verbalizations.*

Synthesizes or integrates analysis of data or information to discover facts or develop knowledge or interpretations; modifies policies, procedures, or methodologies based on findings.

PEOPLE RESPONSIBILITY: *"People Responsibility" refers to individuals who have contact with or are influenced by the position.*

Negotiates or exchanges ideas, information, and opinions with others to formulate policies and programs, or arrive jointly at decisions, conclusions, or solutions.

ASSETS RESPONSIBILITY: *"Assets Responsibility" refers to the responsibility for achieving economies or preventing loss within the organization.*

Requires responsibility for achieving major economies or preventing major losses through the management of a large department or through interpreting policy as legal counsel.

MATHEMATICAL REQUIREMENTS: *“Mathematics” deals with quantities, magnitudes, and forms and their relationships and attributes by the use of numbers and symbols.*

Uses advanced algebra working with exponents and logarithms or linear quadratic equations; analytic geometry; and/or statistics, applying mathematical operations to frequency distribution, reliability and validity, analysis of variance, or correlation techniques.

COMMUNICATIONS REQUIREMENTS: *“Communications” involves the ability to read, write, and speak.*

Reads and interprets advanced professional materials; writes extremely complex reports and papers; speaks to high level professional groups.

COMPLEXITY OF WORK: *“Complexity of Work” addresses the analysis, initiative, ingenuity, creativity, and concentration required by the position and the presence of any unusual pressures.*

Performs work involving the application of principles of logical thinking, scientific, medical, or legal practice to diagnose or define problems, collect data and solve abstract problems with widespread unit or organization impact; requires sustained, intense concentration for accurate results and continuous exposure to unusual pressure.

IMPACT OF DECISIONS: *“Impact of Decisions” refers to consequences such as damage to property, loss of data or property, exposure of the organization to legal liability, or injury or death to individuals.*

Makes decisions with extremely serious impact - affects entire organization and impacts other activities/organizations and the general public; loss of life and/or damage is highly likely.

EQUIPMENT USAGE: *“Equipment Usage” refers to inanimate objects such as substances, materials, machines, tools, equipment, work aids, or products. A thing is tangible and has shape, form, and other physical characteristics.*

Handles or uses machines, tools, or equipment requiring moderate instruction and experience such as computers, software programs such as word processing, spreadsheets, or custom applications, and office machines.

SAFETY OF OTHERS: *“Safety of Others” refers to the responsibility for other people’s safety, either inherent in the job or to assure the safety of the general public.*

Requires some responsibility for safety and health of others and/or for occasional enforcement of the standards of public safety or health.

EDUCATION AND EXPERIENCE REQUIREMENTS

EDUCATION REQUIREMENTS: *“Education Requirements” refers to job specific training and education required for entry into the position.*

Requires education or training equivalent to a master’s degree in business, accounting, human resource development, or public administration.

LICENSES, CERTIFICATIONS, AND REGISTRATIONS REQUIRED: *“Licenses, Certifications, and Registrations” refers to professional, state, or federal licenses, certifications, or registrations required to enter the position.*

Requires none.

EXPERIENCE REQUIREMENTS: *“Experience Requirements” refers to the amount of work experience that is required for entry into the position that would result in reasonable expectation that the person can perform the tasks required by the position.*

Requires over ten years of related experience with at least four years of progressively responsible experience in public administration and budget analysis.

Requires comprehensive knowledge of governmental budget practices and procedures; of governmental fund accounting; of the principles and practices of public administration or modern business management; of the limits of feasible public action; and of quantitative methods and modern application of those methods to assist in solving management problems.

Requires considerable knowledge of federal and state grant-in aid programs; of the federal and state legislative process; of federal and state legislation and regulations and its effect on county government; and a working knowledge of the applications of information technology to the solution of managerial problems.

AMERICANS WITH DISABILITIES REQUIREMENTS

PHYSICAL DEMANDS: *“Physical Demands” refers to the requirements for physical exertion and coordination of limb and body movement.*

Requires light work involving standing or walking some of the time, exerting up to 20 pounds of force on a regular basis, and moderate dexterity in operating machinery, tools, or office equipment.

UNAVOIDABLE HAZARDS: *“Unavoidable Hazards” refers to unusual conditions in the work environment that may cause illness or injury.*

None

SENSORY (ADA) REQUIREMENTS: *“Sensory Requirements” refers to hearing, sight, touch, taste, and smell necessary to perform the tasks required by the position efficiently.*

The position requires normal visual acuity and field of vision, hearing, and speaking abilities.

AMERICANS WITH DISABILITIES ACT COMPLIANCE

Lake County is an Equal Opportunity Employer. ADA requires the County to provide adequate accommodations to qualified persons with disabilities. Prospective and current employees are encouraged to discuss ADA accommodations with management.

** FLSA Disclaimer: MAG consultants are not attorneys and do not offer legal opinions. The exemption status of any job classification should be reviewed by competent legal counsel.*