

## BUDGET MANAGER

### Description of Work:

The positions in the budget manager band serve as the highest technical experts in organizations in the preparation, development, and administration of the agency budget and contributions to the development of the Governor's Recommended Budget. These roles provide program direction, consultancy, problem resolution, and staff administration. Managers/Directors are required to have diverse knowledge and understanding of a variety of programs represented by the agencies, and ability to build effective working relationships with department heads and government officials. These positions must be able to respond to requests of the Governor and the General Assembly in an efficient manner.

### ROLE DESCRIPTIONS BY COMPETENCY LEVEL

Contributing	Journey	Advanced
<p>Employees at this level are expected to demonstrate elevated proficiency in the practices, policies, regulations, and laws related to budget development and execution. Employees may have supervisory responsibilities for a small professional staff or technical staff. There is frequent interaction with agency heads, OSBM, and legislative analysts.</p>	<p>Employees at this level are expected to demonstrate superior proficiency (mastery) in the practices, policies, regulations, and laws related to budget development and execution. Employees have supervisory responsibilities for a professional staff and/or technical staff. Responsibilities often include the oversight of agency budget operations, review the work of staff, development and implementation of new policies and/or procedures, decision-making authority and problem-solving for unusual situations. There is some interaction with elected officials and legislative committees. Employees must be prepared to present information to the legislature when requested</p>	<p>Employees at this level are expected to demonstrate mastery in the practices, policies, regulations, and laws related to budget development and execution. Employees have supervisory responsibilities for a professional staff and technical staff. Responsibilities often include the oversight of agency budget operations, review the work of staff, development and implementation of new policies and/or procedures, decision making authority and problem solving unique situations that will have large-scale impact on agencies and business practices. There is frequent interaction with elected officials and legislative committees. Employees at this level often present information to the legislature and other executive entities as needed.</p>

## BUDGET MANAGER

Competency	Definition
<b>Professional Knowledge</b>	Considerable knowledge of professional fiscal theory, techniques, practices and procedures; considerable knowledge of the fiscal area of assignment and skills in applying these knowledge in a review; general knowledge of state and federal rules and regulations governing the fiscal program; general knowledge of agency/university practices, procedures and principles.
<b>Program Supervision and Administration</b>	Ability to establish expectations and clear direction to meet goals and objectives. Ability to motivate and engage employees through effective communication. Knowledge of appropriate policies and procedures for recruiting, selecting, developing, counseling, disciplining, and evaluating performance of employees to retain a diverse workforce. Ability to administer and ensure compliance with human resources policies and procedures. Ability to observe and assess work. Ability to provide feedback. Ability to provide technical supervision of staff. Ability to develop plans for employees to gain necessary knowledge, skills, and abilities to successfully perform their duties. Ability to plan for and support employees in career development opportunities. Ability to assign work and to establish work rules and acceptable levels of quality and quantity of work. Ability to review work and evaluate performance of others, and to develop individuals' competencies.
<b>Critical Thinking</b>	Critical thinking includes questioning, analysis, synthesis, interpretation, inference, inductive and deductive reasoning, intuition, application and creativity. Ability to assess and interpret work. Ability to develop, evaluates, implement and modify work. Ability to make accurate decisions.
<b>Change Management</b>	Ability to plan and implement change initiatives. Ability to support innovation and creativity by encouraging staff to accept and resolve challenges. Ability to remain flexible to meet constantly changing and sometimes opposing demands.
<b>Communication</b>	Ability to present information effectively in a manner suited to the characteristics and needs of the audience. Ability to convey information clearly and concisely either verbally or in writing to ensure that the intended audience understands the information and the message. Ability to listen and respond appropriately to others.

## BUDGET MANAGER

Note: Competency statements are progressive and not all competencies apply to every position/employee. Evaluate only those that apply. For positions with some supervision consider the highest level of professional work performed.

### Professional Knowledge

Considerable knowledge of professional fiscal theory, techniques, practices and procedures; considerable knowledge of the fiscal area of assignment and skills in applying these knowledge in a review; general knowledge of state and federal rules and regulations governing the fiscal program; general knowledge of agency/university practices, procedures and principles.

Contributing	Journey	Advanced
<p>Considerable knowledge of professional fiscal theory, techniques, practices and procedures, and may require knowledge of generally accepted accounting principles; skills in applying this knowledge.</p> <p>Applies considerable knowledge of local, state and federal regulations and statutes governing the area of work.</p> <p>Applies knowledge of applicable information technology and internal controls to meet work needs. Team needs to add IT competency and impact of work with other systems and programs</p> <p>Basic knowledge of supervisory practices and skill in supervising others, including communication skills, how to delegate and assign duties, how to deal effectively with difficult employees, how to evaluate performance and to participate in disciplinary actions. Basic knowledge of state government's Human Resources interview policies and</p>	<p>Full knowledge of professional fiscal theory, techniques, practices and procedures and may require knowledge of generally accepted accounting principles; skills in applying this knowledge.</p> <p>Applies full knowledge of local, state and federal regulations and statutes governing the area of work.</p> <p>Independently uses applicable information technology to perform. Ensures integrity of information systems, internal controls and data, including recommending modifications as required.</p> <p>Team needs to add IT competency and impact of work with other systems and programs</p> <p>Considerable knowledge of supervisory practices and skill in supervising others, including communication skills, how to delegate and assign work, how to deal effectively with difficult employees, how to evaluate performance and may assist or</p>	<p>Extensive knowledge of professional fiscal theory, techniques, practices and procedures and may require knowledge of generally accepted accounting principles; skills in applying this knowledge.</p> <p>Applies extensive knowledge of local, state and federal regulations and statutes governing the area of work.</p> <p>Assess and applies thorough knowledge of the reliability of systems and internal controls; identifies problems and changing requirements</p> <p>Team needs to add IT competency and impact of work with other systems and programs</p> <p>Extensive knowledge of supervisory practices and skill in supervising others, including communication skills, how to delegate and assign work, how to deal effectively with difficult employees, how to evaluate performance and to conduct investigations and participate in disciplinary</p>

## BUDGET MANAGER

<p>procedures. – need to merge this with the Program Supervisory – so it is not measured twice – get better wording</p>	<p>conduct investigations and participate in disciplinary actions. Working knowledge of state government's Human Resources policies and procedures.</p> <p>Basic knowledge of strategic planning methodologies and practices.</p>	<p>actions. Ability to mentor new supervisors. Full knowledge of state government's Human Resources policies and procedures.</p> <p>Considerable knowledge of strategic planning methodologies and practices.</p>
---	---	---

Basic knowledge - The span of knowledge minimally necessary to complete defined assignments.

Full/Considerable knowledge - The span of knowledge necessary to independently complete defined assignments to produce an effort or activity directed toward the production or accomplishment of the research objective.

Extensive knowledge - The broad scope of knowledge demonstrated on the job that is beyond journey competencies.

### Program Supervision and Administration

Ability to establish expectations and clear direction to meet goals and objectives. Ability to motivate and engage employees through effective communication. Knowledge of appropriate policies and procedures for recruiting, selecting, developing, counseling, disciplining, and evaluating performance of employees to retain a diverse workforce. Ability to administer and ensure compliance with human resources policies and procedures. Ability to observe and assess work. Ability to provide feedback. Ability to provide technical supervision of staff. Ability to develop plans for employees to gain necessary knowledge, skills, and abilities to successfully perform their duties. Ability to plan for and support employees in career development opportunities. Ability to assign work and to establish work rules and acceptable levels of quality and quantity of work. Ability to review work and evaluate performance of others, and to develop individuals' competencies.

Contributing	Journey	Advanced
<p>Assesses employee competencies and conducts/participates in performance management reviews. Coaches and mentors staff</p> <p>Plans and assigns work tasks. Motivates employees and develops team commitment towards meeting</p>	<p>Coaches and facilitates the enhancement of employee competencies as appropriate to the needs of the work unit.</p> <p>Manages resources effectively to provide for employee training and growth, to meet the operational goals</p>	<p>Mentors, coaches and manages the total competencies of staff in multiple organizational units or region. Seeks sources and opportunities for employee training and growth.</p> <p>Directs the management of program and staff resources.</p> <p>Involves employees in strategic planning and</p>

## BUDGET MANAGER

<p>the operational goals and objectives. Identifies and addresses quality of work and performance improvement issues for the unit.</p> <p>Reviews work and written reports to ensure compliance with standards and requirements; guides staff in providing appropriate documentation to support conclusions. May conduct and prepare work and written reports.</p>	<p>and objectives. Addresses quality monitoring and performance improvement issues for the program or area of responsibility.</p> <p>Reviews and approves work findings /written reports, often of moderate complexity. Ensures that fiscal rules and regulations are interpreted correctly.</p>	<p>implementation and in the development of policies and procedures.</p> <p>Identifies and addresses quality monitoring and performance improvement issues for fiscal services for the program or area of responsibility for multiple units or region.</p> <p>Reviews and approves documents and reports more complex or unique issues and effectively articulates written conclusions. Ensures that fiscal rules and regulations are interpreted correctly, internal and external to the organization.</p>
--	--	---

### Definition of Moderate complexity needed; Definition of documentation needed

#### Critical Thinking

Critical thinking includes questioning, analysis, interpretation, inductive and deductive reasoning. Ability to assess and interpret work. Ability to develop, evaluate, implement and modify work. Ability to make accurate decisions.

Contributing	Journey	Advanced
<p>Makes determinations based on facts Identifies problems, reports potential problems, and assesses options.</p> <p>Interprets delivery of service and compliance with local, state and federal regulations and standards.</p> <p>Identify risk impact on program policy and procedure issues.</p>	<p>Analyzes moderately complex situations. Recommends solutions and options; alerts leadership to impact on program.</p> <p>Recommends response to a moderately complex situation based on interpretation of local state and federal regulations and standards.</p> <p>Recommends modifications to program policy and procedures to minimize risk.</p>	<p>Manages complex work situations. Anticipates and remains alert to potentially problematic situations. Resolves unusual problems.</p> <p>Implements response to a situation based on interpretation of local state and federal regulations and standards.</p> <p>Ensures implementation of program policy and procedure changes.</p>

# BUDGET MANAGER

**Change Management**

Ability to plan and implement change initiatives. Ability to support innovation and creativity by encouraging staff to accept and resolve challenges. Ability to remain flexible to meet constantly changing and sometimes opposing demands.

Contributing	Journey	Advanced
<p>Understands change management strategies and principles.</p> <p>Communicates and implements new policies and procedures.</p>	<p>Leads a transition from old to new programs at the unit level.</p> <p>Participates in the development and implementation of goals and objectives.</p>	<p>Leads the development and implementation of vision and mission statements. Leads and directs the development and implementation of goals and objectives.</p>

**Communication**

Ability to present information effectively in a manner suited to the characteristics and needs of the audience. Ability to convey information clearly and concisely either verbally or in writing to ensure that the intended audience understands the information and the message. Ability to listen and respond appropriately to others.

## BUDGET MANAGER

Contributing	Journey	Advanced
<p>Communicates with individual work units or entire organization on fiscal program elements. Updates existing communications.</p> <p>Disseminates information on changes in policies, procedures, and protocols.</p> <p>Prepares, organizes and may review written reports according to documentation standards and requirements; guides staff in providing appropriate documentation to support conclusions.</p> <p>Acquires basic understanding of working relationships with fiscal co-workers and others in order to achieve work goals.</p>	<p>Communicates moderately complex fiscal/programmatic information outside of the organization. Interprets fiscal rules and regulations internal to the organization.</p> <p>Reviews and approves written reports, often of moderate complexity. Ensures that fiscal rules and regulations are interpreted correctly.</p> <p>Reviews and approves written reports, often of moderate complexity. Ensures that fiscal rules and regulations are interpreted correctly.</p> <p>Develops contacts and relationships with interested parties in achieving division/organizational goals.</p>	<p>Communicates major and/or complex situations and actions, internal and external to the organization. Interprets rules and regulations internal and external to the organization; serves as a technical resource in developing response to the media.</p> <p>Documents and reports more complex or unique issues and effectively articulates written conclusions. Ensures that fiscal rules and regulations are interpreted correctly, internal and external to the organization.</p> <p>Develops and maintains professional working relationships in complex and/or difficult situations in order to achieve organizational goals.</p>

**Minimum Training and Experience Guidelines:**

Four year degree in Accounting, Business, Finance or closely related degree to the area of assignment with 12 hours of accounting (Accounting and Auditing managers may need more than 12 hours based on position needs) and three years of professional accounting experience of which at least one is supervisory; or an equivalent combination of training and experience.

Special Note: This is a generalized representation of positions in this class and is not intended to identify essential work functions per ADA. Examples of competencies are primarily those of the majority of positions in this class, but may not be applicable to all positions.