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Class Specifications for theBUSINESS MANAGEMENT OFFICER SERIES

This series includes all classes of positions which are to advise and assist the director and program managers regarding business management functions, exclusive of personnel management, and to direct and coordinate relevant administrative staff services and controls.

A position in this series is located in the central staff office of a department having several major programs that involve: (1) operations and activities which are widely dispersed geographically and which may be sufficiently intense to require the establishment of administratively discrete district offices; (2) fiscal requirements encompassing a variety of sources of operating funds and program earnings and a heavy volume of financial transactions and control activities; and (3) manpower requirements reflecting a broad and complex organizational and staffing pattern as indicated by numerous and varied classes of work and a relatively large number of employees. Major focus in such a position is on financial and organizational management including long-range multiple program planning, budgeting, expenditure control and accountability, and financial reporting and evaluation. However, a position in this series fundamentally has a more general concern, assists and advises all levels of management in planning, organizing, coordinating, controlling and evaluating the use of departmental resources to achieve maximum efficiency and economy. Therefore, a position in this series requires a broad knowledge and skill in dealing with organization, methods, equipment, and other related management resources and tools, as well as funds.

A position in this series directs a staff of specialized professional and technical personnel, as well as clerical personnel, in providing services and maintaining controls in financial management, organization and methods analysis, and purchasing and inventory. Other staff services may be assigned affecting the scope of responsibility and complexity.

Levels in this series are distinguished on the basis of the nature and variety of functions assigned the purpose and nature of person-to-person work relationships, nature and scope of recommendations, decision, commitments and conclusions; nature and extent of supervisory control over the work of other employees, and knowledge and abilities required.

BUSINESS MANAGEMENT OFFICER I

8L.003

Duties Summary:

Advises and assists top management in various business management functions, conducts and coordinates administrative staff services and controls, and performs other duties as required.

Distinguishing Characteristics:

This class is distinguished by its responsibility for the formulation of policies and the general framework of business management procedures governing decentralized business management services. A broad management concern is evident, but primary emphasis is on financial research and planning and formulation of the operating budget. Internal audit of financial and related functions is maintained, and services in organization and procedures are provided the various organizational components of the department. A small staff of professional and technical personnel in budgeting, internal control and management analysis is involved.

Examples of Duties:

Plans and conducts the summarization and compilation of the departmental annual operating budget document; plans and directs the development of work measurement standards, statistical procedures and other means for budget justification; conducts the development of a budget manual, and advises departmental units in preparing budget estimates, coordinates the preparation of departmental expenditure plans, and the evaluation of program performance and financial trends; conducts the preparation of forecasts of operating revenues and expenditures; coordinates results of work with capital improvements budgeting activities; participates in recommending measures to finance long-range program plans; directs the internal audit of fiscal and related transactions; directs the evaluation of fiscal and related methods and procedures of the various organizational components of the department and recommends improvements; plans and conducts the evaluation of operating administrative methods and procedures and recommends improvements; directs the maintenance of manuals on organization, methods and procedures; maintains appropriate liaison and effective working relationships with budgetary, fiscal and other State agencies, and prepares necessary correspondence and other memoranda.

Knowledge and Abilities Required:

Knowledge of: Principles and practices of business management, including fiscal and supply management, organization and methods analysis, principles and practices of administration.

Ability to: Plan, organize, direct and coordinate various administrative staff services; prepare clear and concise reports; prepare budget justifications and compile an operating budget; establish and maintain effective working relationships with others; speak effectively to individuals and groups; develop and analyze facts; and make sound administrative decisions and recommend policies, develop manuals and related presentations.

BUSINESS MANAGEMENT OFFICER II

8L.004

Duties Summary:

Advises and assists top management in various business management functions, directs and coordinates administrative staff services and controls, and performs other duties as required.

Distinguishing Characteristics:

This class is distinguished by its responsibility for the development and conduct of various administrative staff services including the formulation of policies and business management procedures. Standards and controls in all aspects of financial management are centralized in the office headed by a position in this class but related functions such as in property and supply management may be decentralized. Internal audit of financial and related functions is maintained, and services in program analysis and planning, and organization and procedures are provided the various components of the department. A moderate-sized staff of professional and technical personnel in budgeting, expenditure control and accountability, financial reporting and evaluation, and management analysis is involved. Supervision is largely through subordinate supervisors.

Example of Duties:

Participates in the analysis and evaluation of departmental programs and the formulation of basic program plans; directs the summarization and compilation of the departmental annual operating and capital improvements budget documents; plans and directs the development of work measurement standards, statistical procedures and other means for budget justification; conducts the development of operating and capital improvements budget manuals, and advises operating management in developing

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budget estimates, directs the maintenance of central accounting records, and preparation of reports; directs the preparation of departmental expenditure plans, and the evaluation of program performance and financial trends; directs the preparation of forecasts or operating revenue and expenditures, recommends long-range financing measures; serves as departmental resource in budget presentations; directs the internal audit of fiscal and related transactions and the maintenance of manpower controls; directs purchasing operations; directs the evaluation of administrative methods and procedures, and recommends improvements, directs the maintenance of manuals on organization, methods and procedures; maintains appropriate liaison and effective working relationships with budgetary, fiscal and other State agencies, and federal representatives, and prepares correspondence and other memoranda; may oversee general clerical, mail, duplicating and other related supportive services.

Knowledge and Abilities Required:

In addition to the knowledge required at the next lower level, a position at this level requires knowledge of program analysis and evaluation, and governmental functions and organization. Abilities required are basically the same as at the next lower level but, by virtue of the scope of functions and departmental operations, involve a greater intensity and need for greater skill.

BUSINESS MANAGEMENT OFFICER III

8L.005

Duties Summary:

Advises and assists top management in various business management functions, and administers administrative staff services and controls, and performs other duties as required.

Distinguishing Characteristics:

This class is distinguished by its responsibility for directing the development and conduct of various administrative staff services including the formulation of policies and business management procedures. Standards and controls in all major aspects of administrative management are strongly centralized, including capital improvements programming and planning which are pronounced due to large-scale field and institutional services being provided by the department. Multiple funding of programs is evident. A position in this class is accorded considerable authority by the department director to negotiate and act in his name. A large staff of professional and technical personnel in budgeting, expenditure control and accountability, financial reporting and evaluation, purchasing and supply, capital improvement coordination, and management analysis is involved. Supervision is through subordinate supervisors, including multiple supervisory levels in the area of financial management.

Example of Duties:

Participates in the analysis and evaluation of departmental programs and the formulation of program plans; directs the preparation and execution of the operating and capital improvements budgets; plans and directs the development of work measurement standards, statistical procedures and other means for budget justification; directs the development of budget and other manuals; serves as departmental expert in program planning and budgeting; directs all financial management functions and evaluates and interprets operational data; directs the internal audit of fiscal and related transactions; the maintenance of manpower controls; directs purchasing operations; develops grant proposals and conducts appropriate negotiation; maintains appropriate liaison with State, county and federal agencies, and directs preparation of relevant correspondence, reports and other materials; directs general clerical, mail, duplicating or other related services.

Knowledge and Abilities Required:

In addition to the knowledge required at the next lower level, a position at this level requires knowledge of capital improvements programming and budgeting. Abilities required are basically the same as at the next lower level but, by virtue of the degree of authority and latitude accorded a position at this level and the scope of functions and departmental operations, also include considerable originality, ingenuity and administrative skill.

Due to the transfer of authority to the Department of Education to administer its own Civil Service System pursuant to Act 51 Session Laws of Hawaii 2004, this is an adoption of the class specifications for the Executive Branch Civil Service classes, Business Management Officers I, II & III by the Department of Education Civil Service system.

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