

**DEPARTMENT OF EDUCATION
STATE OF HAWAII**

BUDGET SPECIALIST II, EO-07

DUTIES SUMMARY:

Provides staff services to plan, organize, and conduct, either individually or as a member of a team, the full range of work assignments in budgeting, and performing other related duties as assigned.

DISTINGUISHING CHARACTERISTICS:

This class differs from the Budget Specialist I in that the Budget Specialist II is regularly assigned the full range of the most difficult and complex analysis and consultation work which is carried out usually under the administrative/technical supervision of a Budget Specialist III; whereas the Budget Specialist I is assigned analysis work of a more limited range usually under the immediate technical supervision of a Budget Specialist II.

This class differs from the Budget Specialist III in that the Budget Specialist II performs the full range of the most difficult and complex assignments in a specialized area under the general administrative and technical supervision of a Budget Specialist III; whereas the Budget Specialist III has program responsibility in a specialized area including supervision of a staff of professional and clerical personnel under the administrative and technical direction of a Budget Director.

Positions in this class are afforded independence in planning, organizing and carrying out assignments. Special assignments at this level are usually given with a statement of objectives and limitations, if any, of assignments. A suggested overall plan of work and the nature of results expected are identified. Positions work with independence in determining overall work methods, criteria and techniques to be applied. Completed work is reviewed for overall technical adequacy and conformance with the objectives of the assignments.

EXAMPLES OF DUTIES:

1. Plans, organizes and conducts work assignments or projects in budgeting.
2. Provides consultation to state, complex area, and school officials.
3. Prepares comprehensive analytical or consultative reports, including pertinent data, findings, conclusions, and recommendations.
4. Develops procedures and guidelines to be applied statewide in the Department for budgeting purposes.
5. Assists in compiling and presenting information to the Director, the Assistant Superintendent, the Superintendent, the Board of Education, the Legislature, the general public, and private organizations on matters relating to budgeting.

6. Participates as a working member or resource person in a variety of ad hoc committees, task forces, and investigatory teams dealing with major management problems, and concerns.
7. Participates in the collective bargaining process by researching, collecting, analyzing and preparing necessary data and reports.
8. Searches for grants and develops applications to secure additional revenues for the Department.
9. Provides technical advisement services on the budget, and use of computer technologies to support every facet of federal fund budget execution to state, complex area, and school staff.
10. Develops budget training materials and conducts training sessions on the budget process, budget policies, rules, guidelines, and procedures for state, complex area, and school personnel.
11. Assists in the administration of various operational budget control systems for federal means of finance.
12. Prepares allotment requests for submittal to the Department of Budget and Finance.
13. Coordinates and assists federal program managers at all levels in allocation plan development for all assigned programs including carryover fund allocations.
14. Analyzes funding problems during the year.
15. Analyzes the effectiveness, resources allocations, and efficiency of programs with concomitant recommendations for resolution of identified issues and concerns, whether for general or federal funding sources.
16. Identifies programs with overages/shortages and the reasons for such discrepancies.
17. Examines alternative methods of covering projected shortages.
18. Prepares amended allotments and allotment transfers between programs.
19. Analyzes emergency requests for funds.
20. Analyzes and projects salaries.
21. Performs budget analytical work necessary to insure program accounts are balanced and critical needs are addressed.
22. Analyzes budgets, makes recommendations for adjustments.
23. Compiles summaries and assists the Department in defending such program budgets during BOE, Executive and Legislative review.
24. Performs other related duties as assigned.

MINIMUM QUALIFICATION REQUIREMENTS (MQRs):

Education: Graduation from an accredited college or university with a bachelor's degree in business administration which included coursework in accounting, decision sciences and management; **AND**

Experience: Four (4) years of responsible professional work experience in budgeting, accounting or auditing of which one (1) year shall have been in an education program, agency or system; **OR**

Any equivalent combination of education and experience which provides the following knowledge, abilities and skills:

1. **Knowledge of:** Government accounting including budgetary control and fund accounting systems and principles; business statistics; computer-based information systems; laws, rules, regulations and administrative procedures pertinent to the area or area(s) of assignment.
2. **Ability to:** Perform a variety of professional budgeting functions including complex analysis and report preparation, development of department-wide guidelines and procedures, and providing consultation to state, district and school officials; communicate effectively with others both orally and in writing; operate computer, and other business machines.

RECOMMENDED EQUIVALENCIES FOR EDUCATION:

1. Bachelor's degree in any field from an accredited college or university **PLUS** two (2) years of professional work experience which involved responsibility in budgeting, accounting or auditing or cumulative equivalent experience; **OR**
2. Completion of the Cohort Program (or earlier versions of the Department of Education's school administration training program); **OR**
3. Bachelor's degree in any field **PLUS** two (2) years of experience in any of the Fiscal Specialist, the Accounting Operations Specialist, the Procurement and Distribution Specialist or Reprographic Accounting and Distribution classes.

RECOMMENDED EQUIVALENCIES FOR EXPERIENCE:

1. Two (2) years of professional work experience which involved responsibility for budgeting, accounting, or auditing, or cumulative equivalent experience **PLUS** two (2) years of experience in the Budget Specialist I class; **OR**
2. A master's degree in business administration from an accredited college or university, **PLUS** two (2) years of experience in the Budget Specialist I class; **OR**
3. Five (5) years of experience as a 12-month educational officer, school principal, or vice-principal with the Department of Education **PLUS** two (2) years of experience in the Budget Specialist I class.