

**DEPARTMENT OF EDUCATION
STATE OF HAWAII**

BUDGET SPECIALIST III, EO-08

DUTIES SUMMARY:

Has program responsibility for providing statewide technical services in the preparation, coordination, explanation, execution and control of the Department's operating budget including supervision of a staff of professional and clerical personnel; and performs other related duties as assigned.

DISTINGUISHING CHARACTERISTICS:

This class differs from the Budget Specialist II in that the Budget Specialist III has program responsibility for the preparation, coordination, explanation, execution and control of the Department's operating budget including supervision of a staff of professional and clerical personnel under the general administrative and technical direction of a Budget Director; whereas the Budget Specialist II performs the full range of the most difficult and complex assignments in a specialized area(s), usually under the general administrative and technical supervision of a Budget Specialist III.

This class differs from the Budget Director in that the Budget Specialist III has program responsibility in a specialized area(s) including supervision of a staff of professional and clerical personnel, and conducts analysis and consultative work which regularly involves the most difficult and complex assignments which affect the highest levels of management policies and decision, under the general administrative and technical direction of a Budget Director; whereas the Budget Director directs under the executive direction of the Assistant Superintendent, and through intermediate supervisors, the activities of the several areas of specialization of a major organization of the Department's State office responsible for providing statewide services.

Positions in this class are afforded extensive independence in supervising ongoing activities. Controls imposed are generally in the form of goals and objectives as to related activities, policies and deadlines. In accomplishing special projects or in solving major problems, controls are typically expressed in the form of scope of project, results desired, and time limitations for project completion.

EXAMPLES OF DUTIES:

1. Provides administrative and technical supervision over program(s).
2. Reviews and approves staff work through staff meetings, conferences, and progress/status reports.
3. Provides related consultation to state, complex area, and school officials.
4. Maintains liaison with school, complex area, county, state and federal agency personnel to facilitate the accomplishment of project requirements.

5. Assists or represents the Director, Assistant Superintendent, or Superintendent in presenting information to the Superintendent, the Board of Education, the Legislature, the general public, and other public and private agencies and organizations.
6. Participates as a working member or resource person in a variety of ad hoc committees, task forces, and investigatory teams dealing with major budget problems, issues or concerns.
7. Conducts special studies, analyses, and makes recommendations and prepares and submits reports to the Director for fiscally responsible resolution.
8. Participates in the collective bargaining process by researching, collecting, analyzing and preparing necessary data and reports.
9. Plans and coordinates the development of the Department's operating biennial and supplemental budgets.
10. Writes and disseminates budget preparation instructions; develops work schedules for all analysts involved in budget preparation.
11. Determines time schedules for all phases of the budget preparation cycle.
12. Develops and updates the various forms used in the budget preparation process.
13. Updates the Department's program structure.
14. Conducts meetings with program managers and evaluates their budget requests.
15. Reviews budget requests for accuracy, adequate justification, and adherence to standards.
16. Recommends appropriate alternatives to meet the Department's budget requirements.
17. Consolidates and summarizes individual budget requests into larger program aggregates.
18. Assists in the justification of the recommended level of services at all levels of decision making.
19. Works with the Department of Budget and Finance and legislative committees in their review of the Department's budgets.
20. Coordinates the establishment and continuous review of budget resource standards for various programs.
21. Establishes desirable and optimal benchmarks of resource support.

22. Provides technical and consultative services to state, complex area, and school staffs, Board members, and other personnel on any facet of budgeting including the development of budget requests, the position control system, travel request procedures, professional services contract procedures as well as Board, legislative and executive review and other such budget processes.
23. Conducts consultative and information services including interpretation of budget procedures, clarification of budget policies, writing and disseminating manuals and booklets on budgeting, conducting in-service training sessions, and writing and giving formal informational reports on the status of the Department's budget or budget procedures.
24. Supervises the administration of the position control system for non-certificated personnel.
25. Reviews and processes position action requests and makes recommendations for approval or disapproval.
26. Clarifies and interprets position control policies and procedures, audits the position records for conformance to approved budgets.
27. Researches and prepares memos, testimonies, and reports for the Assistant Superintendent, the Superintendent, the Board, the Governor, the Legislature, and other internal and external offices.
28. Serves as resource staff during Board, executive or legislative review of budget and legislative proposals or policies.
29. Supervises the review of requests for professional services contracts, and travel requests to ensure conformance to executive and Departmental rules and procedures and coordinates the review of such requests.
30. Informs program managers of final decisions made, clarifies policies, and interprets procedures, as appropriate.
31. 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: Seven (7) years of responsible professional work experience in budgeting, accounting or auditing of which three (3) years 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(s) of assignment; principles and practices of supervision.
- 2. Ability to:** Plan, organize, and direct budget functions and activities including complex analysis and report preparation, development of department-wide guidelines and procedures, and providing consultation to state, complex area, and school officials; communicate effectively with others both orally and in writing; deal effectively with federal, state and departmental officials in accomplishing program goals and objectives; 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 Specialist 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; meets four (4) of the seven (7) required years of experience; **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; meets four (4) of the seven (7) required years of experience; **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; meets four (4) of the seven (7) required years of experience.