GUILFORD COUNTY SCHOOLS JOB DESCRIPTION

JOB TITLE: BUDGET TECHNICIAN – CAREER & TECHNICAL EDUCATION

GENERAL STATEMENT OF JOB

Under general supervision performs a large variety of complex fiscal, budgetary, administrative, and secretarial duties requiring a keen awareness of all aspects of Career & Technical Education (CTE) Department and of the College Tech Prep (CTP) Program. Work involves managing multiple budget codes and data bases, maintaining complex computer-based accounting systems, generating budgetary reports, providing informational data, maintaining numerous hard-copy and computerized records and files, handling a large volume of routine telephone inquires from teachers, principals, and the general public, and drafting a variety of informational documents, spreadsheets and correspondence using a variety of computer-driven word processing, spread sheet, and file maintenance programs. Regular situations occur requiring discretionary judgment, analysis and independent action. Reports to the Director of College Tech Prep and Career-Technical Education.

SPECIFIC DUTIES AND RESPONSIBILITIES

ESSENTIAL JOB FUNCTIONS

Establishes and maintains financial databases, spreadsheets, and daily balances for all Career & Technical Education (CTE) and College Tech Prep (CTP) categorical fund expenditures, staff development/travel reimbursements, substitute teacher payroll by budget code, school, CTE program area, CTE course, teacher, and description of items ordered for departmental planning, management purposes and federal audit requirements.

Uses a variety of mathematical formulas; summarizes CTE fiscal and budgetary information; prepares charts graphs and reports required for annual application for State and Federal categorical funds.

Summarizes data from various budget codes into comprehensive reports with limited instructions as required for auditing purposes of categorical funds and continued funding.

Prepares and processes over 3,000 financial transactions annually including purchase orders, travel and staff development reimbursements, contracts, repairs of specialized CTE equipment, positions, etc. in excess of 17 million dollars.

Tracks the progress of all CTE orders by budget code and maintains a detailed summary spreadsheet which includes date sent to purchasing, date purchase order issued, date order received, date invoice received and date order paid. Contacts vendors if instructional equipment orders are not received in a timely manner. Develops spreadsheets of status of orders for

Director to take corrective actions required to prevent reversions of Federal and State funds and to ensure instructional equipment and supplies are delivered on time.

Reconciles monthly reports from Finance for eleven different categorical CTE and CTP budget codes to verify that transactions and balances are accurate and takes appropriate steps to make corrections as needed to ensure that Federal and State funds are not reverted and expenditures do not exceed annual allotments.

Processes extended employment agreements for CTE teachers and staff to include entering agreements into the online system for approval process, maintaining data spreadsheet of contract dates, months-of employment used, dates of partial and complete payments. Receives time sheets, verify hours worked with extended employment contracts and submit CTE director's approval letter to Payroll for payment.

Reconciles monthly state salary report with CTE teacher roster and school CTE allotments to verify that teachers are paid from the correct code. Identifies gaps in employment and contacts payroll, staffing, and/or school to verify any inaccuracies and drafts a report for CTE director to prevent funds from reverting to the State.

Manages requests from schools and CTE teachers for the CTE office to pay for substitutes for CTE teachers to attend training, staff development, Career Technical Student Organization (CTSO) competitions, or conferences to enhance CTE instruction. Verifies substitutes names, rate of pay, number of days, etc. Provides correct budget code to Payroll and enters funding data into spreadsheet of appropriate funding source.

Manages requests for repairs of specialized CTE equipment and prepares documentation for CTE director's approval. Contacts vendors for estimate, prepares requisitions for approval, schedules service, obtains invoice after service is completed, submits documentation to Accounts Payable for payment, enters funding data into spreadsheet of appropriate budget code.

Receives telephone calls and visitors; facilitates problem solving; gives out detailed information regarding department activities and programs; refers calls or visitors to appropriate CTE staff.

Receives incoming mail to keep informed of CTE/CTP activities; prioritizes; routes mail to appropriate CTE staff; handles routine correspondence and independently drafts appropriate replies for director's approval.

Processes information using a variety of computer driven word processing, spreadsheet and file maintenance programs which requires use of a variety of complicated formats for preparing CTE correspondence and reports and CTP information and data packets required for continued funding. Work includes responsibility for accuracy of financial data, spelling, punctuation, format and grammar.

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MINIMUM TRAINING AND EXPERIENCE

Graduation from high school with at least 10 years of progressively responsible experience in financial, secretarial, and administrative work, including office management with experience in the operation of computer-driven word processing, spreadsheet and file maintenance programs preferred; or completion of an associate's degree program in secretarial science or business administration with at least 6 years of experience in secretarial and administrative work, including office management; or graduation from a four-year college or university, preferably with a major in business administration, public administration or a related field and 1 – 3 years of experience in a related field; or an equivalent combination of experience and training.

MINIMUM QUALIFICATIONS OR STANDARDS REQUIRED TO PERFORM ESSENTIAL JOB FUNCTIONS

Physical Requirements: Must be able to use a variety of automated office equipment such as computers, copiers, typewriters, calculators, etc. Must be able to exert a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects. Due to amount of time spent standing and/or walking, physical requirements are consistent with those for Light Work.

Data Conception: Requires the ability to compare and/or judge the readily observable, functional, structural, or composite characteristics (whether similar to or divergent from obvious standards) of data, people or things.

Interpersonal Communication: Requires the ability to speak and/or signal people to convey or exchange information. Includes receiving instructions, assignments and/or directions from superiors.

Language Ability: Requires the ability to read a variety of correspondence, reports, handbooks, forms, lists, etc. Requires the ability to prepare correspondence, reports, forms, charts, etc., using prescribed format.

Intelligence: Requires the ability to apply rational systems to solve practical problems and deal with a variety of concrete variables in situations where only limited standardization exists; to interpret a variety of instructions furnished in written, oral, diagrammatic, or schedule form. Must be able to continually prioritize duties to meet department deadlines and continue external requests.

Verbal Aptitude: Requires the ability to record and deliver information, to explain procedures, to follow oral and written instructions. Must be able to communicate effectively and efficiently in standard English.

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Numerical Aptitude: Requires the ability to utilize mathematical formulas; to add and subtract; and to utilize decimals and percentages.

Form/Spatial Aptitude: Requires the ability to inspect items for proper length, width and shape.

Motor Coordination: Requires the ability to coordinate hands and eyes rapidly and accurately in using office equipment.

Manual Dexterity: Requires the ability to handle a variety of office machines, etc. Must have minimal levels of eye/hand/foot coordination

Color Discrimination: Requires the ability to differentiate between colors and shades of color to prepare data charts and CTP promotional materials.

Interpersonal Temperament: Requires the ability to deal with people beyond giving and receiving instructions. Must be adaptable to performing under stress and when confronted with persons acting under stress.

Physical Communication: Requires the ability to talk and hear: (Talking: expressing or exchanging ideas by means of spoken words. Hearing: perceiving nature of sounds by ear). Must be able to communicate via telephone.

TRAINING AND EXPERIENCE

Thorough knowledge of the operations and activities of the department.

Thorough knowledge of and ability to use grammar, vocabulary, spelling, and punctuation.

Thorough knowledge of office practices and procedures.

Considerable knowledge of common word processing, spreadsheet, and file maintenance programs.

Considerable knowledge of NC DPI specialized planning and data software programs.

Considerable knowledge of computers and peripheral equipment.

Considerable knowledge of specialized financial data programs.

Considerable knowledge of auditing and accountability data requirements of the department.

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Ability to maintain complete and accurate records and to develop standard and complex financial reports from those records.

Skill to operate a computer.

Ability to work independently with little guidance.

Ability to maintain confidential information.

Ability to interact and deal with the public in a professional manner.

Ability to generate correspondence and reports independently.

Ability to operate common office machines.

Ability to plan and prepare meeting agendas.

Ability to sort and distribute documents.

Ability to respond to questions based on considerable knowledge of the department.

Ability to understand and follow oral and written instructions.

Ability to type accurately at a moderate rate of speed.

Ability to establish and maintain effective working relationships as necessitated by work assignments.

DISCLAIMER

The preceding job description has been designed to indicate the general nature and level of work performed by employees within this classification. It is not designed to contain or be interpreted as a comprehensive inventory of all duties, responsibilities, and qualifications required of employees to this job.