

**MONTGOMERY COUNTY GOVERNMENT
ROCKVILLE, MARYLAND
CLASS SPECIFICATION**

**Code No. 000422
Grade 27**

SENIOR MANAGEMENT AND BUDGET SPECIALIST*

DEFINITION OF CLASS:

This is advanced level staff work providing detailed and complex analyses and recommendations concerning the most difficult County Government or other County Agency operating and capital budgets, special issue and project management assignments, managing the acquisition and processing of intergovernmental sources of revenue, including grants, for the County's operating and capital budgets, and/or program evaluation and management analysis. Work also includes the implementation and monitoring of executive level fiscal and programmatic decisions. Personal contacts for employees in this class are primarily with other employees and supervisors in OMB and Department/Agency Heads and their principal managers and staff employees. Also included are occasional contacts with elected and appointed officials and their staff employees in the executive and legislative branches of the County Government and other local and State government agencies. The purpose of these contacts is to advise, persuade, often negotiate, and otherwise present analyses and recommendations about issues which have significant impact on operating and capital budget formulation and decision making, and other issues which have either political, legal, fiscal, social, environmental, tax rate and/or service delivery implications. While this class of work occasionally requires employees to meet with or speak before the general public and citizen groups, it does not require employees to provide direct public service or assistance on a one-to-one basis.

An employee in this class serves as a senior non-supervisory member in one of several groups of Management and Budget Specialists which are assigned throughout the Office of Management and Budget. This class of work is distinguished from the next lower class in this series in that employees in this class work under less supervision and with guidelines of limited dimensions. They are also frequently called upon to provide specific technical assistance to junior and journey level Specialists. Employees at this level possess a significant breadth and depth of knowledge and experience in a broad program area such as human services, public safety, environment, recreation/culture, or transportation. In that capacity, they are called upon to carry out special/sensitive assignments involving complex policy, program and management analyses. Employees work independently in assigned areas with occasional general guidance to resolve technical or subtle program issues. Work is prepared for ultimate use by decision makers; it is expected to be technically and substantively accurate and in compliance with relevant laws, regulations, policies and procedures. Completed work is reviewed by immediate supervisor for feasibility and compatibility with other work in the Office of Management and Budget, and for effectiveness in meeting requirements or expected results. Guidelines are available in the form of policies and procedures, as well as laws and regulations. Employees in this class use these guidelines, applying their experience and judgment in the application of same. Employees are also expected to initiate and help develop new guidelines. The complexity of this class of work is marked by the simultaneous assignment of diverse and complex work assignments; the need to consider, examine, and analyze numerous pieces of information from varied sources and organizations, many of which have competing agendas; working within tight, mandated and frequently conflicting time deadlines; employee

application of highly developed writing, public speaking, and time management skills; maintaining a "balance" between a generalist's approach to policy, procedure and evaluation assignments and a specialist's approach to narrowly focused subject matter; and the use of sophisticated computer programs and systems to facilitate the conduct of complex analyses. The impact of properly performed work is realized by the careful and deliberate analysis of and recommendations concerning a variety of complex issues, the results of which affect other governmental units through decisions made by executive level management. In that regard, employees are expected to plan and design their work assignments, must understand, interpret and apply broad policies to specific issues, and recommend and provide justification for changes and how such changes should be implemented. Employees exercise sound judgment in the identification and selection of issues, alternatives evaluated, and options recommended. Work is performed in a comfortable office environment which is appropriately lighted, heated and cooled. Typically employees sit comfortably to do their work, interspersed by brief periods of walking, standing, bending, carrying of papers and books, and extended periods requiring the use of computer terminals to accomplish work objectives. During extended periods each year, employees are required to work considerable overtime.

EXAMPLES OF DUTIES: (Illustrative Only)

- Reviews and analyzes County Government Department/Agency Operating and Capital Improvement Project (CIP) budget requests and similar requests from other County Agencies such as Board of Education, M-NCPPC, WSSC, and Montgomery College; determines implications (e. g., fiscal, legal, environmental, service delivery, political, etc.) of the budget requests; identifies alternative courses of action with corresponding advantages and disadvantages; and presents before OMB managers and the County Executive the most advantageous course of action.
- Monitors assigned Department/Agency approved Operating and Capital budgets by identifying issues and problems requiring attention, obtaining and analyzing information through field audits and statistical analyses, preparing reports of findings and recommendations, providing guidance and assistance to Department/Agency Heads and managers, and following through on approved course of action.
- Independently conducts or serves as project leader for a wide variety of studies requiring coordination among many people and Departments/Agencies, and consideration of many issues.
- Meets with appropriate officials to discuss proposals, consider alternatives and modifications, and/or resolve problems.
- Analyzes Department/Agency operations and staffing patterns and recommends actions to improve service delivery and attain maximum cost effectiveness.
- Analyzes and recommends action to be taken concerning requests for reallocation of funds and supplemental appropriations; ensures proposed transactions comply with rules, regulations and laws, and represent most cost effective means of accomplishment.
- Represents executive branch of County government at Public Hearings, Council Committee sessions, and Council meetings by providing budgetary and programmatic information.
- Prepares revenue projections, and provides recommendations for changes in revenue, including an analysis of recommended changes to tax rates.
- Reviews and analyzes numerous computer reports; manipulates and reconciles data for clarity and accuracy; and creates data bases, spreadsheets, and other analytic structures to analyze issues, budgets, reorganizations, etc.

- Discovers, analyzes and reports on issues and problems appropriate to areas of assignment. Designs and provides training to other employees in immediate work unit as well as employees, supervisors and managers in other Departments/Agencies.
- Seeks new Federal and State sources of revenue to help fund County Government's CIP and Operating Budget requests, and other funding sources through government grants, private foundations and non-profit organizations, and commercial enterprises. Interprets, evaluates and provides recommendations concerning the appropriateness of various revenue sources.
- Consults with Department/Agency managers concerning negotiation strategies for the acquisition of Federal and State grants and monitoring of same.
- Provides training for County Department/Agency representatives regarding available revenue sources and how to access them.
- Oversees grants processing for all County Departments and Agencies.
- Reviews all grant applications for completeness and future County obligations, compliance with Federal, State and local requirements, and for program goals and objectives, staffing, and budget request.
- Coordinates fiscal monitoring of all grants and other selected revenue sources; coordinates budget processing of grants; and trains OMB staff regarding budget procedures and requirements for grants.
- Develops, prepares, monitors, and controls multiple expenditure, personnel and revenue schedules.
- Prepares the County Council's Appropriation Resolution and the Schedule of Changes from the Recommended Budget, as well as the County's Property Tax Rate Schedules.
- Reconciles the County Council's Appropriation Resolution for input into the County Government's financial accounting system.
- Performs related duties.

KNOWLEDGE, SKILLS AND ABILITIES:

- Thorough knowledge of the principles, practices, methods and techniques of budgeting and program evaluation.
- Thorough knowledge of the laws, rules and regulations governing the preparation, review and implementation of operating and capital budget requests.
- Thorough knowledge of the operation and organization of the Departments and Agencies appropriate to the affected position.
- Skill in identifying, synthesizing and evaluating complex budget related issues and assignments, bringing together information from a variety of sources, and selecting appropriate analytical approaches.
- Skill in negotiating complex issues with Department Agency Heads and management employees.
- Skill in expressing ideas, conclusions, and recommendations effectively, clearly and concisely, both orally and in writing.
- Ability to plan, set priorities and organize numerous work assignments to meet tight and often conflicting deadlines.
- Ability to work tactfully and effectively with employees, supervisors and managers, and with elected and appointed officials and senior staff in assigned Departments and Agencies.
- Ability to use automated systems technology and software as tools for analyzing operating and capital budgets and related matters.

MINIMUM QUALIFICATIONS:

Experience: Four (4) years of experience reviewing, analyzing and monitoring government operating and/or capital budgets, including analysis of and reporting on management and programmatic issues having budgetary implications.

Education: Graduation from an accredited college or university with a Bachelor's Degree.

Equivalency: An equivalent combination of education and experience may be substituted.

LICENSE:

- Possession and maintenance at all times of a valid Class "C" (or equivalent) driver's license from the applicant's state of residence when required for job related duties.

PROBATIONARY PERIOD:

Individuals appointed to a position in this class will be required to serve a probationary period of twelve (12) months and, if promoted to a position in this class, will be required to serve a probationary period of six (6) months. Performance will be carefully evaluated during the probationary period.

Continuation in this class will be contingent upon successful completion of the probationary period.

MEDICAL EXAM PROTOCOL: Medical History Review.

Class Established: May, 1983

Revised: October, 1983

Classification Study: May 1991 (M)

Classification Study: November 1994 (M)

August, 2007

August, 2013