

BUDGET ASSISTANT/PURCHASING AGENT

DISTINGUISHING FEATURES OF THE CLASS:

This position will be responsible for the advertising and purchasing of all municipal supplies and equipment all through the use of prescribed methods and procedures. The incumbent is authorized to issue purchase orders without prior approval of higher-level administrative personnel when the law does not require formal bidding procedures. The position will also prepare budget reports, requests and other budget material. The incumbent is expected to learn, apply and answer inquiries regarding the more routine aspects of the various laws, rules, policies, and procedures of the governmental budgetary process. Work duties involve the computation and verification of financial and statistical data including, checking for mathematical accuracy and adherence to prescribed budget procedures, rules and regulations. Work is performed under the general supervision of professional staff in the department with some leeway allowed in the organization and completion of work. Supervision over the work of other employees is not normally a function of this position.

TYPICAL WORK ACTIVITIES:

The following is indicative of the level and types of activities performed by incumbents in this title. It is not meant to be all-inclusive and does not preclude a supervisor from assigning activities not listed, which could reasonably be expected to be performed by an employee in this title.

1. Computes, tabulates, and verifies statistical and financial data involving the computation of percentages, variances, totals, etc., related to monthly budget progress statistics and projections;
2. Regularly reviews personnel vacancies and works with Human Resources/Personnel to ensure appointments fall within budget parameters;
3. Reviews appropriation requests, checking account balances and adherence to policies and procedures, and makes recommendations to the supervisor;
4. Extracts necessary financial information from adopted resolutions to initiate the appropriation and budgeting process;
5. May figure percentage and variance of revenue and expenditure accounts and informs supervisor of irregular trends or discrepancies in accounts;
6. Checks personnel salary changes for conformance with salary policy and budget request figures submitted by departments for accuracy and completeness;
7. Verifies and enters into automated system data concerning budgetary changes;
8. Answers inquiries from employees and public regarding non-technical aspects of budget;
9. Involved in the researching and computation of financial data for special reports and projects;
10. Prepares, or supervises the preparation of, all bid specifications and statements of general bidding conditions to be included in every notice or invitation to bid; advertises for, solicits, and reviews bids from vendors; maintains lists of bidders and offers, records the history of supplier performance, and issues purchase orders;
11. Awards contracts of sale to vendors for the purchase of equipment and supplies as directed;
12. Supervises and participates in the preparation of specifications for items to be purchased;
13. Keeps current on price trends and market conditions and new or improved items of supply;
14. Oversees the clerical review of requisitions from operating departments and the maintenance of records of expenditures;

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15. Discusses purchasing needs with the department heads and other administrative officials;
16. Verifies deliveries of materials ordered;
17. Maintains liaison with contractors and sellers in their dealings with the purchasing office as well as vendor listings and verified new vendor sources;
18. Maintains an up-to-date, complete catalog and price listing for pertinent commodity groups, including New York State contract listings;
19. Obtains accurate product and price listings, to track inventory levels, process routine orders, and help determine when to make purchases;
20. May supervise the agency's credit card use and Purchasing Card (P-Card) Program if applicable.

FULL PERFORMANCE KNOWLEDGE, SKILLS, AND ABILITIES:

Good knowledge of budgeting principles, practices and procedures; good knowledge of business arithmetic and English; good knowledge of modern office terminology, practices and procedures; good knowledge of various departments and their functions; knowledge of office practices necessary for interacting with staff and vendors, expediting orders, resolving problems with goods and shipments, retrieving information and compiling and analyzing information; knowledge of markets, trade conditions, business methods, and purchasing practices, including, but not limited to, purchasing card (P-Card) programs; knowledge of current practices dealing with appropriations for purchase specifications; knowledge of Federal, State and local laws, codes and rules regulating governmental purchasing; working knowledge of online budgeting systems; knowledge of software packages for inventory control and to develop financial spreadsheets and reports; knowledge of supervisory practices including scheduling, organizing workflow, resolving problems and evaluating employee performance; skill in designing and developing consultant agreements, bid specifications and requests for proposals; ability to analyze, compare, and interpret facts and figures quickly; ability to acquire substantial subject matter knowledge of specialized department or agency programs and related laws and regulations; ability to type accurately at an acceptable rate of speed; ability to communicate effectively, both orally and in writing; ability to follow moderately complex oral and written directions; ability to maintain confidentiality; personal characteristics necessary to perform the duties of the position; physical condition commensurate with the demands of the position; ability to establish and maintain effective working relationships with others.

MINIMUM QUALIFICATIONS:

- EITHER: (A) Master's degree in Business Administration, Public Administration, Accounting or Finance and two (2) years of full-time paid work experience in large quantity purchasing of a variety of commodities and/or in a position primarily responsible for budget related statistical and financial computations;
- OR: (B) Bachelor's degree in Business Administration, Public Administration, Accounting or Finance and three (3) years of full-time paid work experience in large quantity purchasing of a variety of commodities and/or in a position primarily responsible for budget related statistical and financial computations;

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- OR: (C) Associate's degree in Business Administration, Public Administration, Accounting or Finance and five (5) years of full-time paid work experience in large quantity purchasing of a variety of commodities and/or in a position primarily responsible for budget related statistical and financial computations;
- OR: (D) An equivalent combination of education, training and experience as indicated in (A) and (B) and (C) above.

ADOPTED: 10/8/2020