



## DUTCHESS COUNTY CLASS SPECIFICATION

## Budget Assistant

DATE ADOPTED: 09/13/1982

LAST REVISION: 07/02/2025

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### **BUDGET ASSISTANT**

#### **DISTINGUISHING FEATURES OF THE CLASS:**

This position is responsible for the performance of specialized clerical and paraprofessional work in the review and preparation of budget reports, requests, and other budget materials to provide the professional staff with information to be used in budget processes such as forecasting, monitoring growth, and preparing upcoming budgets. Work duties involve the computation and verification of financial and statistical data, checking for mathematical accuracy and adherence to prescribed budget procedures, rules and regulations. This position differs from clerical positions in that 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 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. Checks personnel vacancy control forms and may adjust departments' new hire dates to conform to remaining personnel funds;
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. Adjusts monthly balances and may figure percentage and variance of certain accounts such as contingency fund, Sales tax, Medicaid, etc., and informs supervisor of irregular trends or discrepancies in accounts;
6. Checks personnel salary changes for conformance with salary policy;
7. Checks budget request figures submitted by departments for accuracy and completeness;
8. Verifies and enters into automated system data concerning budgetary changes;
9. Answers inquiries from employees and public regarding non-technical aspects of budget;
10. May be involved in the researching and computation of financial data for special reports and projects;
11. Provides clerical and administrative support, including mail/correspondence, telephone calls, scheduling, copying, typing, etc;
12. When employed in the County, may provide backup secretarial support service for County Executive.



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**BUDGET ASSISTANT** (Cont'd)

**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; working knowledge of online budgeting systems; ability to learn and use a variety of software packages; ability to type accurately at an acceptable rate of speed; ability to communicate effectively, both orally and in writing; ability to deal effectively with a variety of people; 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.

**MINIMUM QUALIFICATIONS:** Either

(A) Bachelor's Degree in Business Administration or a closely related field; OR

(B) Associate's Degree in Business Administration or a closely related field and two (2) years of paid work experience in finance or budgeting which included analysis.

**NOTE:** Your degree must have been awarded by a college or university accredited by a regional, national, or specialized agency recognized as an accrediting agency by the U.S. Department of Education/U.S. Secretary of Education.

**SPECIAL REQUIREMENT:**

Candidate must indicate ability to type, i.e. courses in typing or typing work experience.

<b>BARGAINING UNIT: NUB/Confidential</b>	<b>JURISDICTIONAL CLASSIFICATION: Competitive</b>
<b>GRADE: CD</b>	<b>FLSA Code: OT Eligible</b>
<b>REVISION HISTORY: 09/13/1982, 06/02/1986, 01/31/1991, 12/19/1995, 04/15/1996, 03/05/2010, 9/30/2014, 12/14/2017, 07/02/2025</b>	