



## BUDGET & PURCHASING MANAGER

### **DEFINITION**

Under administrative direction, the Budget & Purchasing Manager provides leadership and vision maintaining the quality, administration and maintenance of the district's budget development, budget control, and purchasing operations.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives administrative direction from the Director of Fiscal Services. Provides work direction and supervision to Budget and Purchasing staff.

### **CLASS CHARACTERISTICS**

This management classification assists in planning, organizing, and coordinating, of budget and purchasing processes. Positions at this level assist in administrative, long- and short-term planning, and budgeting; in addition, make recommendations for implementation of programs, projects, goals, and policies and procedures of budget and purchasing processes, ensuring alignment with the attraction, retention and academic success of students. Incumbents serve as a professional-level resource for organizational, managerial, and operational analyses and studies. Performance of the work requires the use of considerable independence, initiative, and discretion within broad guidelines.

### **EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)**

*Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.*

- Assures appropriate budgetary management including planning, coordination and supervision over the district's budget development and budget control processes.
- Provides leadership formulating and maintaining sound District budget practices, ensuring compliance with applicable statutes, regulations and District policies and procedures.
- Develops and prepares the district's annual budget in accordance with District budget allocation principles and methodologies, in coordination with the college's budget development plans.
- Performs comprehensive and complex budget analysis, projections and reporting and provides recommendations as appropriate to assure compliance with District financial goals and objectives.
- Assists in the maintenance of the district's position budget control system.
- Maintains the District's chart of accounts in accordance with the California Community Colleges Chancellor's Office Budget and Accounting Manual and provides assistance during the district's year-end closing process and annual audits.
- Organizes, maintains and evaluates all purchasing procedures including receiving and processing of requisitions.
- Prepares and directs the preparation of specifications, bids and quotations and analysis of same in coordination with District facilities personnel.
- Approves purchase orders; recommends award of bids and contracts; conducts inquiries; interviews vendors and analyzes prices and market trends to establish and maintain optimal sources of supply.
- Prepares bid awards, notices of completion, purchasing contracts, and the purchase order listing for presentation to the Board of Trustees.
- Conducts periodic vendor procurement outreach activities related to construction projects.

- Supervises the filing of records, correspondence, and receiving reports.
- Establishes goals and objectives for assigned areas of responsibility in concert with the District's strategic plan and administrative program review.
- Supervises and evaluates assigned staff.
- Assists with and provides leadership handling sensitive transactions.
- Through continued study and participation in local, regional and state activities, and in professional organizations, maintains an understanding of current ideas, trends, practices, laws and regulations pertaining to the areas of responsibility for this position.
- Maintains familiarity with and adherence to and assists the college community and general public in interpreting: generally accepted accounting principles; governmental accounting standards; Government Code; California Code of Regulations; Public Contract Bidding Regulations; UCCAP Regulations; Title V Regulations; Education Code; California Community Colleges Budget and Accounting Manual; and compliance with federal and state regulations.
- Assists in interpreting college programs to the public through community contacts and participation in local, regional and state activities.
- Maintains an understanding of current ideas, research and practices pertaining to the areas of responsibility for this position, through continued study and participation in professional organizations.
- Performs other related responsibilities as may be assigned.
- Provide technical direction regarding proper budgeting and purchasing procedures to District personnel.
- Obtain, review and analyze information concerning relevant new legislation and regulations that impact the district's legal budget requirements; assist with the development and implementation to procedures to ensure compliance.
- Ensures staff observe and comply with District and mandated safety rules, regulations, and protocols.
- Performs other duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Principles and practices of budgeting and purchasing as applicable to community colleges.
- Methods, principles, practices, terminology, and procedures of governmental and generally accepted accounting standards
- Preparing budget spreadsheets and reports with results of analytical information; methods utilizing statistical analysis for financial information gathering projecting and reporting.
- The California Community College's Budget and Accounting Manual, Government Code, California Code of Regulations, Public Contract Bidding Regulations, UCCAP Regulations, Title V Regulations, Education Code.
- Computer software applications, including Excel, Access and Word; the operation of business equipment, including computers, copiers, and calculators; integrated information systems and use of appropriate software.
- Federal, state and local laws, codes and regulations pertaining to community college accounting and financial reporting.
- Principles and practices of leadership.
- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, and the training of staff in work procedures.
- Principles and procedures of District budgeting and accounting.
- Provisions of the California Community College Budget and Accounting Manual.
- Principles and practices of budget development and administration.
- District and mandated safety rules, regulations, and protocols.
- Techniques of providing a high level of customer service by effectively interacting with students, staff, faculty, representatives of outside organizations, and members of the public, including individuals of

diverse academic, socio-economic, ethnic, religious, and cultural backgrounds, physical ability, and sexual orientation.

- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

**Ability to:**

- Plan, organize, oversee and manage assigned staff.
- Provide leadership in the areas of budget development, budget monitoring and purchasing.
- Assist the Director of Fiscal Services with budget forecasting and development, procurement standards development and maintenance.
- Maintain effective working relationships throughout the district.
- Effectively plan, organize and coordinate to oversee and evaluate a complex and diverse program of budgeting and purchasing functions.
- Communicate ideas and recommendations clearly and effectively both orally and in writing.
- Conduct research and analysis, identify trends and forecast needs
- Select, train, supervise, evaluate, motivate and lead staff members.
- Interpret and apply federal and state laws, rules and regulations relating to community college budget and purchasing operations.
- Train assigned project staff in budget establishment and control.
- Meet schedules and timelines.
- Understand and follow oral and written directions.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Demonstrate sensitivity to, and understanding of, the diverse academic, socio-economic, ethnic, religious, and cultural backgrounds of community college students.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

**Education and Experience:**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

**Education:**

- Equivalent to a bachelor's degree from an accredited college or university with major coursework in finance, accounting, business administration, or a related field.

**Experience:**

- Four (4) years of progressive experience in the area of business, or a related field, including a minimum of two (2) years in an administrative or supervisory position, preferably with a community college or school district.

**Desirable Qualifications**

- Experience involving the following: budget management; financial analysis; financial reporting, forecasting and making projections; extensive experience in California Community College purchasing practices and business operations.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

**ENVIRONMENTAL CONDITIONS**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.