## General Statement of Duties
Performs intermediate-level professional budget management and analysis work to oversee and monitor agency or department budget functions.

## Distinguishing Characteristics
The Associate Budget Analyst may work within an agency or department performing various budget related functions or work within an organization that services multiple agencies and departments with regard to a specific area of budgeting.

The Associate Budget Analyst is distinguished from the Staff Budget Analyst, which performs entry-level professional budget management and analysis while training and assisting with higher-level analysis under close supervision; and, is distinguished from the Senior Budget Analyst, which performs full performance professional level budget management and analysis work that is complex and specialized in day-to-day activities and budget functions.

The following definitions are meant to assist in distinguishing between the three core concepts of accounting, budgeting, and finance, which are as follows:

- **Accounting**: Tracks, records, and reconciles financial transactions to ensure consistency and compliance with fiscal rules, and creates reports for historical records, audits, and the evaluation of financial processes and transactions.

- **Budgeting**: Tracks, monitors, and projects expenditures, allocates funds, oversees assets, and prepares justifications and reports with regard to a specific organizational budget and associated business needs.

- **Finance**: Researches, analyzes, calculates, and compiles financial data, prepares reports for business decision making, determines best use of financial resources, which includes determining interest rates, investments, and managing cash and debt.

## Guidelines, Difficulty and Decision-Making Level
Guidelines are generally numerous, well established and directly applicable to the work assignment. Work assignment and desired results are explained by general oral or written instructions.

Duties assigned are generally repetitive and restricted in scope but may be of substantial intricacy. Employee primarily applies standardized practices.

Decisions or recommendations on non-standardized situations are limited to relating organizational policies to specific cases. Problems that are not covered by guidelines or are without precedent are taken up with the supervisor.

## Level of Supervision Received & Quality Review
Under normal supervision, within a standardized work situation, the employee performs duties common to the line of work without close supervision or detailed instruction. Work product is subject to continual review.
Interpersonal Communication & Purpose

Contacts with the public or employees where explanatory or interpretive information is exchanged, gathered or presented and some degree of discretion and judgment are required within the parameters of the job function.

Level of Supervision Exercised

None

Essential Duties

Reviews and analyzes routine agency or department budget functions, assists with budget development and planning, monitors and tracks financial transactions, maintains financial systems, reconciles financial discrepancies, and assists with preparing decision packages and presenting budget recommendations at budget hearings.

Supports assigned client groups with routine budget development and planning functions, works directly with division directors to gain understanding of business needs, forecasts spending, ensures expenditures are on pace with budget allotments, and guides management in decision making.

 Develops and reviews routine business cases and proposals for client groups, which includes conducting feasibility studies, analyzing performance metrics, and building financial models for major projects and asset acquisitions.

Monitors andtracks routine financial transactions within assigned budget accounts, which includes creating and entering journal vouchers, processing internal billing transfers and change orders, approving requisitions, allocating funds within budget accounts, and compiling and recording documentation.

Prepares routine budget reports, spreadsheets, and financial statements, reviews and interprets financial information for management, creates reports to estimate expenditures, tracks encumbrances, identifies funding issues and discrepancies, and presents findings and recommendations to management.

Initiates and reviews routine purchase orders, processes invoices, enters vouchers into financial systems and monitors and tracks encumbrances for impacts to budget accounts.

Oversees routine position justifications for a single or multiple client groups, maintains and tracks position totals, conducts workload analyses, and provides client groups with reports detailing personnel costs to manage organizational growth.

Assists with conducting budget focused projects, which include analyzing financial processes, researching budgetary and financial issues, performing financial calculations, and creating reports for management review and decision making.

Ensures compliance and maintains fiscal accountability with regard to rules, regulations, standards, policies, and procedures.

Works with stakeholders both internal and external to the City, responds to inquiries, provide increasingly more complex information and assistance with regard to specific budgetary transactions, and works with client groups to resolve budgetary issues and guide budgetary decision making.

By position, assists with developing the comprehensive annual budget for the City, which includes calculating and forecasting expenditures, creating reports and financial models, working directly with management to guide decision making, and preparing budget presentations for mayoral and council committees.

Performs other related duties as assigned or requested.
Any one position may not include all of the duties listed. However, the allocation of positions will be determined by the amount of time spent in performing the essential duties listed above.

**Competencies**

- **Arithmetic** - Performs computations such as addition, subtraction, multiplication, and division correctly using whole numbers, fractions, decimals, and percentages.

- **Customer Service** - Interacts with customers in a friendly and professional manner, works to resolve issues quickly and effectively, and is knowledgeable about products and services.

- **Decisiveness** - Makes well-informed, effective, and timely decisions, even when data are limited or solutions produce unpleasant consequences; perceives the impact and implications of decisions.

- **Financial Administration** - Recommends, administers, allocates, reallocates, negotiates, and monitors revenue and/or expenditures to ensure cost-effective management of programs, projects, and policies for a functional and/or operational area.

- **Information Management** - Identifies a need for and knows where or how to gather information; organizes and maintains information or information management systems.

- **Reasoning** - Identifies rules, principles, or relationships that explain facts, data, or other information; analyzes information and makes correct inferences or draws accurate conclusions.

- **Written Communication** - Composes, reviews, edits, and issues written materials for diverse audiences and communicates purpose in a succinct and organized manner that is appropriate for context, time, and place.

**Knowledge & Skills**

- Knowledge of the principles, methods, and techniques of financial analysis, forecasting, and modeling to interpret quantitative and qualitative data; includes data modeling, earned value management, and evaluating key financial indicators, trends, and historical data.

- Knowledge of various types of contracts, techniques, or requirements (for example, Federal Acquisitions Regulations) for contracting or procurement, and contract negotiation and administration.

- Knowledge of the principles and practices of budget administration and analysis; including preparing, justifying, reporting on, and executing the budget; and the relationships among program, budget, accounting, and reporting systems.

**Education Requirement**

Bachelor’s Degree in Finance, Accounting, Business Administration, or a related field.

**Experience Requirement**

One (1) year of professional level experience analyzing budgets, financial statements, preparing budget justification requests, and allocating funds according to spending priorities.

**Education & Experience Equivalency**

No substitution of experience for education is permitted.

Additional appropriate education may be substituted for experience requirements.
## Licensure & Certification

None

## Working Environment

Subject to many interruptions.
Pressure due to multiple calls and inquiries.

## Level of Physical Demand

1-Sedentary (0-10 lbs.)

## Physical Demands

(Physical Demands are a general guide and specific positions will vary based on working conditions, locations, and agency/department needs.):

- **Sitting:** remaining in the normal seated position.
- **Carrying:** transporting an object, usually by hand, arm, or shoulder.
- **Balancing:** maintaining body equilibrium to prevent falling over.
- **Reaching:** extending the hand(s) and arm(s) in any direction.
- **Handling:** seizing, holding, grasping, or otherwise working with hand(s).
- **Fingering:** picking, pinching, or otherwise working with fingers.
- **Talking:** expressing or exchanging ideas by means of spoken words.
- **Hearing:** perceiving the nature of sounds by the ear.
- **Repetitive motions:** making frequent movements with a part of the body.
- **Eye/hand/foot coordination:** performing work through using two or more.
- **Vision Near Acuity:** ability to see clearly at 20 inches or less.
- **Accommodation:** ability to adjust vision to bring objects into focus.
- **Walking:** transporting body and objects from place-to-place.
- **Bending:** bending at the waist to move an object from one level to another.
- **Kneeling:** to access documents at a lower level.
- **Lifting:** raising or lowering objects weighing no more than 10 pounds, from one level to another.

## Background Check Requirement

- **Criminal Check**
- **Education Verification**
- **Employment Verification**

## Assessment Requirement

None

## Probation Period

Six (6) months.
Class Detail

Pay Grade: V-810
FLSA Code: Y
Management Level: 10
Established Date: 9/21/2018
Established By: Lori Schumann
Revised Date:
Revised By:
Class History: