



Office of Human Resources
Budget Analyst Specialist - CV2910
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General Statement of Duties

Performs specialized, professional level budget management and analysis work in overseeing specific budgeting functions and programs that impact agency and department budgets and the City's annual budget.

Distinguishing Characteristics

The Budget Analyst Specialist supports special initiatives and programs within the Office of Budget and Management, and may support multiple client groups outside of the organization.

The Budget Analyst Specialist is distinguished from the Senior Budget Analyst, which performs full performance level budget management and analysis work; and, is distinguished from the Budget Analyst Supervisor, which performs professional level supervision over professional budget analysts and support staff.

The following definitions are 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.

Level of Supervision Exercised

By position, performs lead work.

Essential Duties

Develops and prepares the comprehensive annual budget for the City, which includes calculating and forecasting expenditures, editing budget narratives, creating reports and financial models, forecasting revenues for long-range planning, working directly with management to guide decision making, and preparing budget presentations for mayoral and council committees.

Manages and oversees grant awards citywide, oversees systems administration of grant database, works directly with stakeholders to develop and plan grant budgets, approves grant proposals and contracts, chairs advisory committees, oversees grant policy development, trains personnel on grant application processes, and ensures compliance with grant reporting and documentation.

Designs and directs special projects that impact organizational and citywide budgets, which includes researching and analyzing business proposals and processes, performing complex financial calculations, conducting feasibility studies, forecasting expenditures, preparing reports and presentations, and recommending courses of action to manage fiscal accountability.

Works with multiple client groups to facilitate budget development and planning, provides consultative services, researches and analyzes budget proposals, monitors and tracks financial transactions and expenditures, evaluates performance against budget, and provide strategic direction.

Prepares and presents legislative and ordinance budget recommendations to mayoral and council committees, which includes researching and reviewing ordinance requests for budget rational and overall financial impact, preparing policy and legal language, monitoring ordinance process, guiding decision making to ensure consistency with fiscal rules and regulations, and develops procedures for new policies.

Develops and reviews business cases and proposals to manage capital improvement initiatives and programs, which includes conducting feasibility studies, working with stakeholders, preparing requisitions and narratives, researching economic trend data, analyzing performance metrics, and building financial models for major projects and asset acquisitions.

Directs and administers contracts, which includes developing contractor requirements, terms, and rates within fiscal rules and policies, and approves and allocates funds within budget accounts to pay for contractor goods and services.

Creates specialized financial reports, spreadsheets, and financial statements, reviews and interprets complex financial information for management and stakeholders, creates reports to estimate and track budget functions, develops financial and revenue models, and queries financial information in support of the use of financial resources in guiding decision making within the highest levels of government.

Works with stakeholders both internal and external to the City, responds to inquiries, provides complex and specialized information and assistance with regard to specific financial transactions, and works with client groups at the highest level of city government and public and private sectors to resolve financial discrepancies and guide financial decision making.

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.

Decision Making - Specifies goals and obstacles to achieving those goals, generates alternatives, considers risks, and evaluates and chooses the best alternative in order to make a determination, draw conclusions, or solve a problem.

Financial Management - Prepares, justifies, and/or administers the budget for program areas; plans, administers, and monitors expenditures to ensure cost-effective support of programs and policies; assesses financial condition of an organization.

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 requirements, practices, and procedures for soliciting, receiving, reviewing, and processing proposals, and awarding and administering grants and agreements.

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

Three (3) years of full performance, professional level experience analyzing budgets, preparing financial reports, statements, and budget justifications, and managing budget programs and functions.

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-814

FLSA Code: Y

Established Date: 9/21/2018

Established By: LS

Revised Date:

Revised By:

Class History: