General Statement of Duties

Performs entry-level professional budget management and analysis work to oversee and monitor agency or department budget functions while receiving training in fiscal rules and policies.

Distinguishing Characteristics

The Staff 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 Staff Budget Analyst is distinguished from the Associate Budget Analyst, which performs intermediate-level professional budget management and analysis work that is considered routine and general in day-to-day activities, whereas the Staff Budget Analyst performs entry-level budget management and analysis work while in training under close supervision.

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

Procedures, methods and techniques to be used are well established with options to be considered well defined. Tools, work aids and materials to be used are specified. Work steps are demonstrated or made clear by straightforward oral instructions.

Detailed oral and/or written instructions are normally given during the training period.

Duties assigned are primarily routine, repetitive and restricted in intricacy with little or no discretion in how they are carried out.

Level of Supervision Received & Quality Review

Under close supervision, the employee receives training to develop skills and abilities in a specific line of work or general occupational area. Work product is subject to close, continuous inspection.

Interpersonal Communication & Purpose

Contacts with the public or employees where factual information relative to the organization or its functions is received and relayed, or a service rendered, according to established procedures or instructions.
Level of Supervision Exercised

None

Essential Duties

Trains and assists with reviewing and analyzing routine agency or department budget functions, assists with budget development and planning, monitors and tracks routine financial transactions, and maintains financial systems.

Trains and assists client groups with routine budget development and planning functions, works directly with management to gain understanding of business needs, forecasts expenditures, ensures expenditures are on pace with budget allotments, and creates reports and spreadsheets.

Trains and assists with reviewing and analyzing routine grant awards within financial systems to include contracts specific to the grant, updates and monitors general information and profiles within a database, and reviews and monitors grants to ensure expenditures are on target with appropriations.

Trains and assists with monitoring and tracking routine financial transactions within budgets, which includes creating and entering journal vouchers, processing internal billing transfers and change orders, approving requisitions, allocates funds within budget accounts, and compiling supporting documentation.

Trains and assists with preparing budget reports, spreadsheets, and financial statements, reviews and interprets financial information for management, and creates reports to estimate expenditures, tracks encumbrances, and identifies funding issues and discrepancies.

Trains and assists with initiating and reviewing routine purchase orders, processing invoices, entering journal vouchers into financial systems, and monitoring and tracking encumbrances.

Trains and assists with reviewing and analyzing routine position justifications for a single or multiple client groups, approves or denies staffing additions, maintains and tracks position totals, conducts workload analyses, and provides client groups with reports detailing personnel costs to control organizational growth.

Trains and learns fiscal rules, regulations, standards, policies, and procedures, in order to reconcile discrepancies and ensure compliance with regard to fiscal accountability.

Works with stakeholders both internal and external to the City, responds to inquiries, provides routine information and assistance with regard to budgetary transactions, and works with client groups to resolve budgetary issues.

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.
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.

Writing - Writes in a clear, concise, organized, and convincing manner for the intended audience.

### Knowledge & Skills

None

### Education Requirement

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

### Experience Requirement

None

### Education & Experience Equivalency

No substitution of experience for education is permitted.

### 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

**Assessment Requirement**

None

**Probation Period**

Six (6) months.

**Class Detail**

Pay Grade: V-620
FLSA Code: N
Management Level: 10
Established Date: 9/21/2018
Established By: Lori Schumann
Revised Date:
Revised By:
Class History: