



Career Service Authority
Senior Agency Budget Analyst

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GENERAL STATEMENT OF CLASS DUTIES

Performs full performance level professional work coordinating the budget process and analyzing, preparing and monitoring the budget for a City agency.

DISTINGUISHING CHARACTERISTICS

This class is the highest level in the Agency Budget Analyst Series. It is distinguished from Associate Agency Budget Analyst, which performs standard or intermediate level duties, by its performance of professional full performance or journey level duties. The Agency Budget Analyst series is also distinguished from the Financial Management Analyst series. Budget related positions within the Financial Management Analyst series have management consulting responsibilities which include analysis of the efficiency and effectiveness of operations and programs in assigned agencies.

This class is also distinguished by the following factors:

Guidelines, Difficulty and Decision Making Level:

Guidelines are generally but not always clearly applicable, requiring the employee to exercise judgment in selecting the most pertinent guideline, interpret precedents, adapt standard practices to differing situations and recommend alternative actions in situations without precedent.

Duties assigned are generally complex and may be of substantial intricacy. Work assignment is performed within an established framework under general instructions but requires simultaneous coordination of assigned functions or projects in various stages of completion.

Employee is responsible for determining time, place and sequence of actions to be taken. Unusual problems or proposed deviations from guidelines, practices or precedents may be discussed with the supervisor before being initiated.

Level of Supervision Received and Quality Review:

Under general supervision, the employee receives assignments and is expected to carry them through to completion with substantial independence. Work is reviewed for adherence to instructions, accuracy, completeness and conformance to standard practice or precedent. Recurring work clearly covered by guidelines may or may not be reviewed.

Interpersonal Communications and Purpose:

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

Level of Supervision Exercised:

By position, exercises supervision over subprofessional employees or performs leadwork over other analysts.

ESSENTIAL DUTIES

Coordinates and reviews annual agency budget requests, assists agency personnel in preparing multiple annual budget requests and consolidates budget requests into an agency-wide operating budget.

Evaluates priorities, alternative revenue sources, performance measures and opportunity costs to recommend budget expansion or reduction.

Assists management and staff in understanding budgeting and financial reports and principles, prepares recommendations and reports and may coordinate and implement the budget process.

Assembles, consolidates and summarizes inventory and capital expenditure budgets and maintains physical asset inventory.

Prepares various statistical reports including financial statements, management reports and reconciliations of revenue, expenses and cash flow projections to actual balances.

Monitors, analyzes, researches and explains significant revenue and budget variances, including actual costs versus budgeted costs.

Prepares long and short-term estimates and forecasts of cash flow generated from revenues and expenditures.

Some positions perform payroll and personnel related functions.

Some positions monitor quality control issues and prepare production, project, staffing level and material analysis.

Trains assigned employees and checks their work, and may assist in preparing employee performance evaluations.

Performs other related duties as assigned or requested.

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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.
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MINIMUM QUALIFICATIONS

Competencies, Knowledges & Skills:

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

Reading - Understands and interprets written material, including technical material, rules, regulations, instructions, reports, charts, graphs or tables; applies what is learned from written material to specific situations.

Writing - Recognizes or uses correct English grammar, punctuation and spelling; communicates information in a succinct and organized manner; produces written information, which may include technical material, that is appropriate for the intended audience.

Problem Solving - Identifies problems; determines accuracy and relevance of information; uses sound judgment to generate and evaluate alternatives, and to make recommendations.

Customer Service - Works with customers to assess needs, provide assistance, resolve problems, satisfy expectations; knows products and services; is committed to providing quality products and services.

Self-Management - Sets well-defined and realistic personal goals; displays a high level of initiative, effort and commitment toward completing assignments in a timely manner; works with minimal supervision; is motivated to achieve; demonstrates responsible behavior.

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

Planning and Evaluating - Organizes work, sets priorities, determines resource requirements; determines short- or long- term goals and strategies to achieve them; coordinates with other organizations or parts of the organization; monitors progress, evaluates outcomes.

Knowledge of budgeting principles and practices sufficient to be able to assume budgetary responsibilities as required.

Knowledge of inventory techniques sufficient to be able to maintain asset inventory.

Knowledge of budgeting techniques sufficient to be able to prepare budgetary reports and revenue forecasts.

Knowledge of statistics sufficient to be able to perform statistical analysis and generate decisions from the analysis.

Knowledge of econometrics, statistics and forecasting methodologies sufficient to be able to perform economic forecasting duties as assigned.

Knowledge of accounting principles sufficient to be able to prepare quarterly and/or yearly financial reports.

Knowledge of office operations sufficient to be able to provide a variety of personnel functions and coordinate agency efforts.

Knowledge of supervisory theories and methods sufficient to be able to perform a variety of supervisory functions.

Skill in independently adapting, interpreting and applying written guidelines, precedents and standardized work practices to a variety of unprecedented or problematic situations.

Skill in utilizing the principles and practices of effective and persuasive communications to elicit and/or present explanatory or interpretive information.

Skill in exercising initiative, judgment and decision making in solving problems and meeting organizational objectives.

Skill in analyzing complex problems and determining justification in accordance with budgetary theories and practices.

Physical Demands:

Sitting: remaining in the normal seated position.

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.

Eye/hand/foot coordination: performing work through using two or more.

Working Environment:

Subject to many interruptions.

Pressure due to multiple calls and inquiries.

Education Requirement:

Baccalaureate degree in finance, accounting, business or a related field.

Experience Requirement:

Three years of professional level experience analyzing budgets and financial statements, preparing and justifying budget requests and allocating funds according to spending priorities.

Education/Experience Equivalency:

A master's degree in the prescribed major fields may be substituted for the prescribed baccalaureate degree or one year of the required experience. A baccalaureate degree in any major field may be substituted for two years of the required education in a prescribed major field. Appropriate experience in addition to the required experience may be substituted for the required education on the basis of one year of experience for one year of education.

Licensure and/or Certification:

Some positions require the completion of the Career Service Authority supervisory training course prior to the end of probation.

CLASS DETAIL

FLSA CODE: Exempt

ESTABLISHED DATE: 09/16/1995

REVISED DATE: 11/16/2003

REVISED BY: Paul Wiberg

CLASS HISTORY Specification rewritten in the new format to make it consistent with the other class specifications in the Agency Budget Analyst class series. A distinguishing characteristics section and competencies were added.