



Office of Human Resources
Budget Analyst Senior - LV2425
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General Statement of Duties

Performs full performance level professional budget management and analysis work to oversee and monitor agency or department budget functions.

Distinguishing Characteristics

The Senior 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 Senior 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 and budget functions; and, is distinguished from the Budget Analyst Supervisor, which performs professional level supervision over professional budget analysts and support staff.

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.

Essential Duties

Manages and oversees the budget for an agency or department, works directly with management to develop and plan the budget, monitors and tracks all financial transactions, maintains financial systems, reconciles financial discrepancies, prepares decision packages, and presents budget recommendations at budget hearings.

Prepares the annual budget for an agency or department, works with management to plan and identify business and capital needs, forecasts expenditures, determines funding for projects and programs, and conducts feasibility studies.

Monitors and tracks financial transactions within specific 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 supporting documentation.

Manages and oversees contracts, which includes reviewing contractor requirements, terms, and rates to ensure compliance with fiscal rules and policies, and approves and allocates funds within budget accounts to pay for contractor goods and services.

Creates budget specific reports, spreadsheets, and financial statements, reviews and interprets complex financial information for management, creates reports to estimate and track budget functions, develops financial models, and queries financial information in support of the use of financial resources.

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

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

Works with stakeholders both internal and external to the City, responds to inquiries, provides specialized and 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, develops and reviews 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.

By position, works with agencies and departments to manage grant awards, works directly with management to develop and plan grant budgets, approves grant proposals and contracts, and ensures compliance with grant reporting and documentation.

By position, assists with the development of 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.

By position, 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, and provide strategic direction.

Performs other related duties as assigned.

Employees may be re-deployed to work in other capacities in their own agencies or in other City agencies to support core functions of the City during a City-wide emergency declared by the Mayor.

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 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.

Level of Supervision Exercised

By position performs lead work.

Education Requirement

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

Experience Requirement

Three (3) years 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

For DPL Positions Specifically:

Atmospheric Conditions: conditions that affect the skin, eyes or respiratory system.

Handles absentee replacement on short notice.

Handles emergency or crisis situations.

Occasional pressure due to multiple calls and inquiries.

Subject to pressure for multiple calls, inquiries, and interruptions.

Level of Physical Demand

For DPL Positions Specifically:
1-Sedentary (0-10 lbs.) - 2-Light (10-20 lbs.)

Physical Demands

For DPL Positions Specifically:

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

Depth Perception: Ability to judge distances and space relationships.

Eye/Hand/Foot Coordination: Performing work through using two or more body parts or other devices.

Fingering: Picking and pinching, through use of fingers or otherwise.

Handling: Seizing, holding, grasping, through use of hands, fingers, or other means.

Hearing: Perceiving and comprehending the nature and direction of sounds.

Lifting: By Position, may move objects up to 10 pounds, or 10-20 pounds from one level to another.

Reaching: Extending the hands and arms or other device in any direction.

Repetitive Motions: Making frequent or continuous movements.

Sitting: Remaining in a stationary position.

Talking: Communicating ideas or exchanging information.

Vision Far Acuity: Ability to perceive or detect objects clearly at 20 feet or more.

Vision Near Acuity: Ability to perceive or detect objects at 20 inches or less.

Background Check Requirement

Criminal Check
Education Verification
Employment Verification

Assessment Requirement

None

Probation Period

None

Class Detail

Pay Grade: EX-10

FLSA Code: Y

Established Date: 9/21/2018

Established By: LS

Revised Date:

Revised By:

Class History: