



Office of Human Resources
Budget Analyst Staff - CV2051
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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.

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.

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.

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

Level of Supervision Exercised

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.):

Accommodation: Ability to bring objects into focus.

Balancing: Maintaining equilibrium.

Bending: Bending or positioning oneself to move an object from one level to another.

Carrying: Transporting or moving an object.

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.

Kneeling: Assuming a lowered position.

Lifting: Moving objects weighing no more than 10 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 Near Acuity: Ability to perceive or detect objects at 20 inches or less.

Walking: Ability to move or traverse from one location to another.

Background Check Requirement

Criminal Check

Education Verification

Assessment Requirement

None

Probation Period

Six (6) months.

Class Detail

Pay Grade: EX-07

FLSA Code: Y

Established Date: 9/21/2018

Established By: LS

Revised Date: 1/1/2025

Revised By: BM

Class History: 4/18/21 FLSA change due to study; 1/1/25 – Revised pay grade per annual market analysis.