



CLASS SPECIFICATION FOR:

**Senior Budget and Management Analyst**

**General Statement of Duties:**

Assists departments with complex analysis, planning, preparation, justification and administration of their annual operations and capital projects budgets, variable revenue and non-County funding sources; coordinates and participates in work sessions; performs a wide variety of routine and complex duties to prepare assigned departments' fiscal year budgets and related documentation for inclusion and presentation in the County's annual fiscal plan and capital expenditures plan; does related work as required.

**Distinguishing Features of Class:**

Assigned to the County's centralized Finance Department's Office Management and Budget (OMB) Division, primary duties include serving as the primary OMB Division contact for a portfolio of assigned departments with complex funding, revenues and significant capital project budgets; working closely with designated department staff to prepare, review, justify and present complex annual budgets; monitoring assigned departments' funding, revenues and expenditures; working with departments on financial issues including budget transfers and reallocations; assisting department with mid-year appropriations requests; adhering to and advising departments on established budget policies, guidelines and practices; coordinating and participating in work sessions; assisting with implementation of the County's approved annual budget; and researching, identifying and reporting on legislative, economic and policy trends. The incumbent in this class serves as senior resource to other budget analysts, overseeing and coordinating more complex work-cycle initiatives, projects and assignments. The employee assists management in establishing policies and procedures and accomplishing the mission and goals of the Office of Management and Budget (OMB). The portfolio of departments for a Senior Budget and Management Analyst includes agencies with complex budgets including variable non-County funded funding resources, revenues, and significant capital project budget requests as well as other sensitive staffing, funding, programming or operational needs and issues. Work is performed under the general supervision.

**Examples of Assigned Duties** (*illustrative of the types and scope of duties and responsibilities assigned to positions in this class*):

- Works closely with County departments to understand departmental programs, operations and operational issues;
- Works closely with departments to understand and accurately budget for non-County funded variable funding resources which may include grants, mandated program funding, State Comp Board funding, revenues generated by the department, etc.;
- Works closely with departments to develop and analyze capital projects needs and requests, and monitors the progress of capital projects expenditures to approved budgeted amounts;
- Collaborates with departments' staff and other key stakeholders on sensitive staffing, funding, programming or operational needs and issues affecting the departments' operating and CIP budgets;
- Plans, assigns, reviews and participates in the professional budget preparation and analysis duties of the Finance department;
- Schedules, organizes, coordinates, and participates in work sessions with agency heads, key personnel, and others in reviewing and negotiating budget requests;
- Assists department users in utilizing budget data collection software, including OMB's current budget system;
- Analyzes departments' budget estimates and prepares summaries for budget presentation;
- Receives and reviews budget requests from an assigned portfolio of departments, including estimates of non-County funding, revenues and expenditures and all supporting information and documentation for justification of budget requests;
- Obtains additional data and substantiation of budget estimates and requests from departments as necessary;
- Responsible for oversight of monitoring department budgets for compliance with stated goals and objectives and ensuring that expenditures are made in accordance with appropriations and established County guidelines;
- Analyzes requests for funding source transfers and amendments to the County's Annual Fiscal Plan;
- Assists departments with mid-year appropriation requests and prepares summaries to be presented to the Board of Supervisors;
- Assists analysts in preparing statistical data for financial documents and provides this information in a concise and accessible report form to management and various other audiences, including the Board of Supervisor, County citizens and customers;
- Aids in the preparation of source data for multi-year forecasting of revenues and expenditures;
- Assists with required fiscal-impact assessments as required by the Commission on Local Government, the County's Legislative Liaison and/or other County agency heads and key officials;
- Oversees the conduct of management studies in County agencies;
- Directs and participates in productivity analyses to evaluate and measure work; recommends changes to standards as necessary;
- Assists in developing and implementing budget practices and policy;



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- Researches State and Federal legislation, economic and policy trends, identifies potential impact to County, and provides reports on findings Budget Supervisor and Budget Director;
- Serves as subject matter expert for OMB staff, including serving as lead worker, resource and trainer to lower-level budget analysts in OMB, and reviewing personnel actions for position control reconciliation;
- Leads or supervises office, team and special projects as assigned;
- Assists in preparing presentations made to the County Manager, the County's Leadership Group, the Board of Supervisors and other audiences, as required;
- Performs other duties as assigned.

### Required Knowledge, Skills and Abilities:

Extensive knowledge and understanding of the principles and practices of public accounting and public administration; extensive knowledge of the principles and practices of public accounting and budget preparation and control with ability to accurately analyze and develop accurate funding, revenue and expenditures forecasts and budgets, monitor expenditures in accordance with County policies; sound working knowledge of the principles, practices and theory of modern management theory; sound knowledge of methods-improvement techniques, management analysis and cost-benefit analysis; excellent attention to detail and excellent organization skills; ability to multi-task effectively and manage competing priorities while maintaining the accuracy and integrity of multiple departments' financial data and budgets; ability to read, and consistently comprehend, accurately interpret, apply and communicate accounting and budgeting policies, guidelines and procedures; excellent critical thinking skills and sound judgment with demonstrated ability to identify, consider and weigh a variety of relevant factors and make accurate, cost effective decisions or recommendations; excellent problem solving skills with the demonstrated ability to appropriately resolve a wide variety of routine and complex questions and issues within established policies, guidelines, requirements and procedures; appropriately seeks guidance or refers unusual situations and questions; strong computer skills with ability to use computer and typical business software, Division-specific software, applications and systems incidental to assigned duties; ability to research, collect, compile, verify, validate, enter and maintain complex data and records accurately in various systems; excellent research skills with the demonstrated ability to compile and analyze relevant data and make appropriate recommendations, summaries, reports and presentations; ability to synthesize and compile multiple types of complex data and produce easily understood forecasts, budgets and summaries; excellent interpersonal and communication skills to communicate technical/financial information to non-technical/non-financial department staff and other stakeholders in audience friendly language; excellent oral and written communication skills with demonstrated ability to express ideas clearly and concisely, orally and in writing; excellent public-speaking skills; excellent political astuteness with ability to express self tactfully, clearly and positively, including in stressful or politically sensitive situations; ability to work independently and as part of a team; ability to collaborate effectively to establish and maintain a good working relationships with colleagues, department staff, County Officials, public and other relevant stakeholders; personal accountability including teamwork and establishing and maintaining positive relationships with the colleagues, department staff and other relevant stakeholders; ability to serve effectively as a team leader; basic supervisory skills including good training skills and the demonstrated ability to effectively manage own and OMB workloads and to foster and maintain high morale and engagement with colleagues and department staff; excellent customer service skills; tact; and courtesy. Must be able to positively and appropriately represent the County with assigned portfolio of departments' staff and other stakeholders. May require the ability to work a flexible schedule as needed.

### Minimum Education and Experience:

Education: Four (4) year degree accounting, finance, public administration or other relevant field of study;

Experience: Six (6) years of relevant responsible experience in complex budgeting and fiscal management of large departments and complex budgets with diverse funding and revenues sources and capital improvement budgets;

OR: Any equivalent combination of education, experience and training which provides the required knowledge, skills and abilities.

### Additional Requirements:

NOTE: Effective 4/1/2009 County Ordinance 1128 requires a criminal history record check and fingerprinting of all employees in authorized and hourly safety sensitive positions.

NOTE: All employees are required to successfully complete National Incident Management System (NIMS) Incident Command System (ICS) 700 (Introduction) training. Successful completion of additional NIMS ICS training courses may be required based on the job classification, level of responsibility, and department. Please refer to Fire's Intranet site for a list of NIMS ICS requirements by job classification.

- May require a valid driver's license to perform assigned duties at various locations Countywide.