

## **SENIOR MANAGEMENT AND BUDGET ANALYST**

### **Summary Position Description**

Assists the Director and Assistant Director in the development formulation and administration of the City's Operating and Capital Improvement Program (CIP) budgets, five-year forecast, decision-support services to the City Manager and Council, strategic planning, general research, and citywide productivity improvement efforts; assists in the development of short- and long-range financial plans related to fiscal requirements; does related work as required.

### **Critical Elements of Performance**

Impacts the development of forms, instructions, budget calendars, and compilation and analysis of data for the preparation of City Manager's budget recommendations and research reports; directs the compilation and analysis of fiscal and performance and service data relating to the operation of the City government; leads the preparation and presentation of key aspects of the Operating budget, CIP and various reports; conducts studies of city or departmental budgeting systems and management programs; participates actively in the Total Quality Management Program; effectively recommends appropriate courses of action and policy regarding assigned projects and areas of responsibility; prepares or, as assigned, coordinates the preparation of analytical revenue and expenditure reports, forecasts and recommendations; consults and advises the executive staff and department heads on budgetary and management problems; develops and maintains microcomputer applications and systems to analyze and monitor key aspects of the Operating budget and Capital Improvement Program (CIP); speaks before interest groups on city fiscal matters and subjects related to various studies; keeps informed on trends and development in the field of local government finance, budget theory and proactive management; as assigned, leads the work of professional analysts in the preparation of budget documents, research reports, and other information; as assigned, makes recommendations to the director on filling vacancies.

### **Performance Standards**

Functions as the contact point for executive staff within assigned areas of responsibility; prepares summaries and analysis of budget and management information; may operate, coordinate or monitor city programs or projects as assigned; assists the Director in preparation of the annual Operating and CIP budgets with an emphasis in high-level specialized assignments; conducts meetings with executive staff and departmental representatives regarding budgets and research projects; coordinates and validates the entry of budget and management information into automated systems; establishes budgetary controls and procedures and methods of analysis for research projects; as assigned by the Director reviews reports and recommendations prepared by other analysts for accuracy, clarity, and recommendations; uses effective interpersonal and communication skills in one-on-one and group situations to gain information for application to management and budgetary issues; develops, possesses and utilizes major specialized skills and knowledge in carrying out high-level department-wide tasks and assignments (e.g., revenue and expenditure forecasting, debt management policy review, total quality coordination).

### **Knowledge-Skills-Abilities Required to Perform Satisfactorily**

A. Knowledge

1. Knowledge of the principles, procedures, and applications of governmental budgeting, governmental forecasting, governmental accounting, finance methods, research methods, evaluation methods, survey methods, and statistical techniques.
2. Knowledge of goal- and program-oriented budgeting, productivity analysis, and strategic planning principles and techniques.
3. Knowledge of the principles, practices, and techniques of fiscal and performance analysis and research as related to municipal budgeting including the analysis of budget submissions.
4. Knowledge of computer hardware and software; experience with microcomputers.
5. Knowledge of organizational systems and processes and the principles and practices of project management.
6. Knowledge of the principles of interpersonal and group relations and sensitivity to others in professional interactions.
7. Knowledge of citywide operations, detailed knowledge of various departmental operations, and knowledge of sources and contacts for information.
8. Knowledge of the total quality management philosophy.

B. Skills

1. Skill in effectively interacting and communicating, both orally and in writing, with departmental officials, staff, and management groups.
2. Skill in relating budgetary and management issues to external trends, administrative goals and Council policy.
3. Skill in applying the principles and procedures of governmental accounting, governmental finance, governmental budgeting, forecasting methods, survey research, program evaluation methods, and statistical techniques to complex problems and issues.
4. Skill in applying comprehensive familiarity of citywide/ departmental operations and sources of information to complex issues and problems.
5. Skill in applying microcomputer and mainframe computer techniques to the resolution of complex issues and assignments including financial and statistical analysis, monitoring and modeling and the use of specialized applications (e.g., forecasting).

6. Skill in goal- and program-oriented budgeting, productivity analysis, and forecasting resource requirements as well as other skills associated with the strategic planning process.
7. Skill in team building, group leadership, and counseling professional employees in the development of work habits.
8. Skill in planning, implementing, and coordinating large, complex projects.
9. Skill in reviewing and editing reports and analysis done by professional staff.
10. Skill in applying total quality management techniques.

C. Abilities

1. Ability to exercise a high degree of initiative and judgment using only brief general direction to analyze highly complex issues/problems.
2. Ability to apply current research and statistical methods to formulate effective recommendations, make presentations to department officials, Council, the public, and prepare any necessary working procedures.
3. Ability to identify budgetary issues and trends, relate them to known or proposed strategies and Council policies, and develop written and oral recommendations and approaches.
4. Ability to analyze, synthesize and make effective recommendations on technical reports, financial reports and statements, and complex administrative reports.
5. Ability to establish and maintain effective working relationships with officials, fellow employees, employees of other departments, and achieve consensus through group processes.
6. Ability to operate microcomputers.
7. Ability to negotiate equitable solutions to financial and administrative problems.
8. Ability to apply comprehensive familiarity with citywide/department operations, identify sources and contacts for information, and conduct in-depth searches for data that is not readily available.
9. Ability to apply productivity analysis techniques, total quality management ideas and processes; prepare and interpret financial reports and statements; develop and evaluate surveys; conduct program evaluations; and develop strategic planning programs.

### **Minimum Qualifications**

Requires any combination of education (above the high school level) and/or experience equivalent to eight (8) years in fields such as public or business administration, urban affairs, or a closely related field, utilizing the knowledge, skills, and abilities listed above and associated with such positions as Management Budget Analyst I, II, III, Public Safety Analyst, Research Analyst, or Planner.

### **Preferences**

Masters Degree in a related field.