

**BUDGET ANALYST**

**DEFINITION**

The position will provide high level, complex analysis and reporting for preparation and monitoring of the County Budget and reporting to the Chief Administrative Officer. This individual will also provide high level, complex financial and programmatic analysis of assigned County departments and appropriations.

To act as a lead in administrative and analytical functions related to the preparation, review and analysis of budgets; to review fiscal operations, practices and internal controls; to plan, direct, coordinate, and participate in administrative activities such as contract administration, and/or other specialized projects/programs; to participate in the development and implementation of policies and procedures affecting the County budget; to serve as subject matter expert in specific area(s) of government operations related to budget, fiscal and policy development; and to serve as a member of the Chief Administrative Officer's team.

**DISTINGUISHING CHARACTERISTICS**

The Budget Analyst is a single exempt classification, professional position responsible for establishing, coordinating, maintaining, and monitoring a variety of administrative policies, budget and fiscal practices and processes on a countywide basis as well as providing a liaison with and support to departments as a representative of the County Administrative Office. Positions within this job series are exclusive to allocation within the County Administrative Office.

This is an advanced journey level class, distinguished from subordinate classes by the greater level of responsibility assumed, complexity of duties assigned and independence of action taken. Employees in this job class perform more difficult and responsible types of duties assigned to classes within this series. Employees at this level are required to be fully trained in all policies, procedures, systems and operations related to assigned areas of responsibility.

**SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision from the County Administrative Officer (CAO)

May exercise supervision over professional, technical, and clerical employees at the direction of the CAO

## **EXAMPLES OF ESSENTIAL DUTIES**

Duties may include, but are not limited to, the following:

- Direct, coordinate, and/or participate in budget preparation, reviews and monitoring for assigned departments; review final budget presentation with justifications; and perform advanced and/or managerial budget preparation and/or analytical work. Ensure coordination of budgeting procedures, preparation, and reporting. Inform management of budget deviations, problems, and events likely to impact operations; explain causes; and measure impact on department mission and resources and operations
- Consult with assigned department(s) on issues related to budget preparation, analyses, presentation, and review; analyze and review the most complex of departmental budgets, provide recommendations and alternative solutions to department(s), assist in reframing departmental budgets to better reflect the goals and objectives of the County. Support assigned departments regarding sensitive and complicated fiscal, policy and program issues and efforts
- Coordinates Position Control tracking with Human Resources and Payroll Departments
- Construct forecasts and estimates for revenue and expenditure projections; provide alternative budget scenarios for management review and finalize budget(s) consistent with County practices
- Create and maintain working spreadsheets and statistical reports for budget analysis; implement necessary adjustments; and maintain fiscal controls. Track budget variances. Ensure that proper and generally accepted accounting practices are being followed
- Conduct complex financial analyses that assist in the development of operational and capital budgets, overhead rates, headcount studies and other fiscal analysis. Prepare summary and detailed financial performance reports, ensuring the accuracy of the data presented
- Support departments in creating effective and appropriate agenda items, memoranda, and correspondence for the County Administrative Officer and Board of Supervisors' review; advise and assist departments in the development of appropriate explanations, documentation, and justification to support agenda items. Prepare agenda items for presentation to the Board of Supervisors and other key officials as appropriate
- May provide technical direction and supervision to professional, technical and clerical staff in support of assigned department(s) and program(s); provide positive leadership and direction to a team of professional and technical staff; act as a primary resource regarding County systems, organization, operations, and services

- Oversee, coordinate, gather data and participate in research and analyses on a variety of issues and topics; perform extensive review of related issues through interviews, correspondence, reading and other research methods; prepare highly detailed, comprehensive reports relating findings to the specific needs and concerns of the County; provide recommendations to the County Administrative Officer and Board of Supervisors
- Oversee, coordinate, and participate in designated special project(s) and /or program(s) and serve as the subject matter expert; develop implementation strategies and monitor the status of assigned program(s) and/or project(s); provide leadership and direction to interdepartmental team members; prepare reports, correspondence and memoranda, and make presentations that include recommended action to the County Administrative Officer and Board of Supervisors
- Maintain current expertise in designated specialty areas; monitor current events and changes to laws, standards, rules and regulations and analyze the effect on the County's operations and services; prepare reports with updates, analyses and recommendations; and represent the County's interests
- Prepare and present responses and/or recommendations in response to questions, issues or concerns related to project(s), program(s) and other specialty areas. Represent the County of Amador and the County Administrative Office to the public and to other agencies in a positive and productive manner.
- Maintain awareness of and participation in external professional organizations and resources to ensure the highest level of professional standards are applied to service delivery within the County's Administrative Office.
- Serve as a positive and motivational team leader as well as a positive and effective member of a peer group
- Recommend to CAO financial/fiscal actions to improve budget
- Perform related duties as required

## **SKILLS, KNOWLEDGE AND ABILITIES**

### Knowledge of:

- Principles and modern methods of public and business administration as related to public finance, budgeting and fiscal control
- Methods and techniques of accounting and financial analysis as approved under Generally Accepted Accounting Principles (GAAP)
- Principles and practices of fiscal, statistical, and administrative research and report preparation

- Computer systems and software including word processing, spreadsheet and database applications
- Standard and accepted English usage, spelling, punctuation and grammar
- Standard and accepted modern research and data collection techniques, including the use of surveys and questionnaires
- Standard and accepted principles and practices of motivation, team building, and conflict resolution
- Pertinent local, state, and federal laws, guidelines, regulations, and statutes
- Modern office procedures, methods and computer equipment
- Principles and practices of local government structure and operations, including county administration, organization, programs and functions

Ability to:

- Direct and participate in advanced administrative, fiscal, and operational activities
- On a continuous basis, analyze budget and technical reports; interpret and evaluate staff reports; know laws; regulations and codes; problem-solve operational and technical policies and procedures; remember various rules and interpret policy
- Develop and administer policies, guidelines and procedures
- Communicate financial information to management and staff in a simple, concise and effective manner
- Perform complex mathematical and statistical calculations accurately
- Analyze and make sound recommendations on complex financial data
- Prepare clear, concise, and comprehensive financial analyses, reports, and written materials as well as charts, tables and presentation materials
- Exercise independent analysis and judgment in solving difficult and complex administrative, management, and technical problems
- Independently perform complex/advanced financial analytical functions
- Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals
- Read, analyze, evaluate and summarize written materials and statistical data including reports, financial reports and budgets
- Apply knowledge in a specific field/area to the needs of the County

- Determine effective method of research; and compile data and present in form most likely to enhance understanding
- Plan, supervise and evaluate work activities of professional, technical, and clerical staff
- Prepare reports, statistical data, forms, presentations, questionnaires and surveys
- Interpret and apply pertinent local, state, and federal laws and regulations
- Analyze situations quickly, accurately and objectively, apply appropriate elements of decision-making and determine the proper course of action
- Use a computer, calculator, typewriter, telephone, facsimile machine, scanner, and photocopy machine
- Communicate clearly and concisely, both orally and in writing
- Establish and maintain effective working relationships with those contacted in the performance of required duties
- Work with various cultural and ethnic groups in a tactful and effective manner
- Work under minimal supervision with extensive latitude for the use of initiative and independent judgment
- On a continuous basis, sit at desk or in meetings for long periods of time; intermittently twist to reach equipment surrounding desk; walk, stand, bend, squat, kneel, or twist, perform simple grasping and fine manipulation; use telephone, and write or use a keyboard to communicate through written means or enter/retrieve data from computer
- Obtain information through interview process; successfully accomplish multiple assignments; and deal firmly and courteously with the public

### **TYPICAL PHYSICAL REQUIREMENTS**

Ability to sit for extended periods; ability to frequently stand and walk; normal dexterity and eye-hand coordination; corrected hearing and vision to normal range; verbal communication; use of office equipment, including computers, telephones, calculators, copiers, and FAX machine

### **TYPICAL WORKING CONDITIONS**

Work is performed in an office environment; continuous contact with staff and the public

**TRAINING AND EXPERIENCE:** *Any combination of training which would likely provide the required knowledge and experience is qualifying. A typical way to obtain the required knowledge and abilities would be:*

**Education:**

Education and training equivalent to a BS Degree in Finance, Accounting or Business Administration from an accredited college or university, and

Graduation from a four- year college or university with major coursework in business or public administration, public policy or a field related to the work desirable; and

**Experience:**

Minimum of four years increasingly responsible analytical, management or administrative work experience in budgeting, accounting, finance, or a comparable field; preferably for a public agency.

**SPECIAL REQUIREMENTS**

**License or Certificate:**

Possession of a valid California driver's license is required