



Range: SG-17
FLSA: Exempt
Date: June 15, 2022

BUDGET & FINANCIAL ANALYST

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

DEFINITION

To provide research, technical assistance, and analysis in support of the Department's financial planning and reporting. Prepares, analyzes, and coordinates the development of the City's annual budget document. Compiles and analyzes both statistical and fiscal data to include conducting extensive research, applying statistical methods, identifying trends and anomalies, and preparing and presenting verbal and written summaries.

SUPERVISION RECEIVED AND EXERCISED

Receives general administrative direction from the Director of Financial Services or designee.

ESSENTIAL AND MARGINAL FUNCTION STATEMENTS--*Essential and other important responsibilities and duties may include, but are not limited to, the following:*

Essential Functions:

1. Perform complex financial analyses and statistical computations for various rate studies, salary increases, financial models and forecasts, and cost allocation plans.
2. Develop and analyze benchmarking and performance management tools.
3. Conduct performance measurement/benchmarking and productivity studies; review performance and program direction; assist departments with development of appropriate measures; evaluate and recommend changes to improve productivity.
4. Analyze national, state and local economic trends affecting the City and reports it to the Financial Services Director.
5. Develop, update, and maintain citywide database systems for budget.
6. Prepare training materials and instructional manuals.
7. Assist in presentations at budget workshops; conduct training sessions for department budget liaisons.
8. Prepare periodic and ad-hoc financial reports and provides in-depth analysis of financial conditions and future trends.
9. Perform complex analysis of capital program funding sources and ensures all legal and statutory requirements are addressed.
10. Review, analyze, and report on the fiscal condition of governmental funds, proprietary funds, and fiduciary funds.
11. Research and answer financial and budget inquiries submitted by staff, management, citizens, other municipalities and the City Council.
12. Advise management, departments, and divisions on budget issues, policies, and procedures

- and assist them in the maintenance of proper budgetary controls.
13. Coordinates and assists with preparation of the City's operating and capital improvement plan budget document.
 14. Coordinates and assists with preparation of the City's budget-in-brief and popular annual financial report, incorporating visual appeal aspects such as infographics and other call-out data and facts.
 15. Assists with preparation of monthly financial reports.
 16. Analyze budget expenditure estimates and fund balances continuously and make necessary budget adjustments throughout the fiscal year.
 17. Participate in the development and implementation of special projects and data processing computer applications.
 18. Perform rate, utility, cost, and tax analyses, economic impact studies, and financial feasibility studies.
 19. Assists in grant tracking and reporting.

QUALIFICATIONS

Knowledge of:

- Principles and practices of governmental operating and capital improvement project budgeting and controls.
- Principles and practices of variance analysis.
- Governmental accounting and auditing principals.
- Government Finance Officers Association (GFOA) budget standards.
- Effective performance measurements.
- Public administration concepts and theories.
- Statistical analysis and theory.
- Report writing techniques.
- Applicable federal, state, and local laws, rules, and regulations.

Ability to:

- Use a computer and related software applications.
- Effectively analyze, quantify, research and communicate a variety of financial and non-financial data and/or information and making recommendation based on findings.
- Perform complex and confidential assignments.
- Make complex mathematical calculations and draw logical conclusions.
- Coordinate capital improvement programs and projects.
- Interpret, apply, and manage program/project requirements.
- Monitor and administer budgets.
- Interpret direction, instruction, criteria, laws, rules and regulations, determines appropriate courses of action, and presents solutions to issues.
- Produce and update documents on a computer using Word, Excel, and other related products.
- Communicate and use interpersonal skills to interact with coworkers, supervisor, the general public, etc. to sufficiently exchange or convey information and to receive work direction.
- Write correspondence and reports in a professional manner.
- Handle multiple projects simultaneously and use good judgement in prioritizing work assignments.
- Possess a valid Arizona driver's license.

EXPERIENCE AND TRAINING GUIDELINES

Any combination of experience and training that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Experience

Three years of experience working with budgetary and financial processes preferably in the public sector; or equivalent combination of education and experience that provides the required knowledge, skills, and abilities.

Training

Bachelor's Degree in Finance, Accounting, Business Administration, Management, Statistics and Research, Economics, or a related field.

WORKING CONDITIONS

Environmental Conditions:

Office environment; travel from site to site; possible exposure to noise, dust and inclement weather conditions; working around office equipment and machinery.

Physical Conditions:

Essential and other important responsibilities and duties may require maintaining physical condition necessary for sitting, standing, or walking for prolonged periods of time; general manual dexterity.