

BUDGET ANALYST

JOB DESCRIPTION

Classification Responsibilities: An employee in this class is responsible for assisting in the overall process of preparing and administering the City's annual operating budget, five-year Capital Improvement Budget, and multi-year revenues/expenditures projections. The Budget Analyst compiles and analyzes both statistical and fiscal data as the basis for preparing specific schedules, tables, and narrative summaries that are included in these various budget documents. Budget Analysts are responsible for the analysis of one or many City departments and funds with assistance from their supervisor or a Senior Budget Analyst. A Budget Analyst is expected to perform work independently with periodic supervisor review.

There are currently three specializations (Forecast, Operations, and Projects) in the Office of Management and Budget. Budget Analysts may have primary duties in one specialization but still perform duties across all specializations. Budget Analysts may be reassigned based on the needs of the office. This class is responsible for performing related duties as required.

Forecast Specialization: Budget Analysts working in the Forecast area are responsible for producing the short-term, mid-term, and long-term financial forecasts. Additional responsibilities include: research and identification of economic influences on the City's revenues and expenditures; performing advanced statistical analysis and comprehensive review of forecast model variables through the use of regression analysis and statistical software packages; and preparing summary presentations and reports for City management. Budget Analysts are also responsible for the development and testing of the Forecast system.

Operations Specialization: Budget Analysts working in the Operations area are responsible for leading major budget processes in support of the City's budget preparation process and budget monitoring during the fiscal year. This includes the production of the annual Executive Budget Plan document; the development of training for City staff; and providing analysis of contingency requests, position costs, and other operational issues.

Projects Specialization: Budget Analysts working in the Projects area are responsible for the Capital Improvement Program (CIP). This involves research, compilation, analysis, and summary of multi-year CIP related data such as: monthly expenditures; bond reconciliations; project-based expenditure reporting; and preparation of tables, charts, and summaries used for the five-year CIP and seven-year forecast period. Budget Analysts working in this area are also responsible for the compilation, analysis, and summary of multiyear Lifecycle and Infrastructure plans, as well as the set-up and management of projects in the City's financial system.

Distinguishing Features: This class is distinguished from the Senior Budget Analyst class primarily by the lesser complexity of both personal computer (PC) programming and detail of schedules, tables, and summaries prepared for the budget documents; and by the narrower scope of the statistical/fiscal data analyzed. Budget Analysts serve as primary department liaisons with on-going support and direction for their supervisor. Progression from a Budget Analyst to a Senior Budget Analyst is accomplished through a non-competitive, criteria-based promotional process. The incumbent must be employed a minimum of two years as a City of Mesa Budget Analyst and have successfully completed initial City

probation. In addition, the incumbent must meet established work standards, demonstrate the level of competency necessary to independently perform assigned tasks, demonstrate knowledge of City financial practices and their application to daily situations, and meet the minimum qualifications of the Senior Budget Analyst classification. An employee in this class functions with minimal day to day supervision and work results are reviewed for accuracy, thoroughness, reasonableness, and completion in a timely manner. This class is FLSA exempt-professional.

QUALIFICATIONS

Employee Values: All employees of the City of Mesa are expected to uphold and exhibit the City's shared employee values of Knowledge, Respect, and Integrity.

Minimum Qualifications Required. Any combination of training, education, and/or experience equivalent to graduation from an accredited college or university with a Bachelor's Degree in Accounting, Finance, Data Analytics, Statistics, or closely related field and a minimum of three years full-time, professional level employment in accounting, auditing, budget preparation, finance, statistical analysis, or closely related financial and/or fiscal activity OR any combination of training, education, and/or experience equivalent to graduation from an accredited college or university with a Bachelor's Degree and a minimum of five years full-time, professional level employment in accounting, auditing, budget preparation, finance, statistical analysis, or closely related financial and/or fiscal activity. Graduation from an accredited college or university with a Master's degree in Accounting, Finance, Data Analytics, Statistics, Business or Public Administration, or closely related field will be considered as two years of qualifying work experience.

Special Requirements. None.

Substance Abuse Testing. None.

Preferred/Desirable Qualifications. Graduation from an accredited college or university with a Master's Degree in Accounting, Finance, Data Analytics, Statistics, Business or Public Administrations, or closely related field. Three years full-time, professional level employment in accounting, auditing, budget preparation, finance, statistical analysis, or closely related financial and/or fiscal activity within a local, county, or state government. Workplace experience with data manipulation through Excel spreadsheets or databases. Possession of a Certified Public Accountant (CPA) or Certified Governmental Financial Manager (CGFM).

ESSENTIAL FUNCTIONS

Communication: Conducts training sessions for department budget liaisons and program managers regarding budget preparation and/or financial analysis. Develops written department procedures outlining the steps entailed in producing various financial reports. Prepares written documents using clearly organized thoughts, proper sentence construction, punctuation, and grammar.

Manual/Physical: Enters data or information into a PC to produce reports and worksheets, and to calculate and reconcile information. Scans the content of a PC screen/monitor to detect minor changes in detailed information. Prepares budget related computer reports to distribute to departments.

Mental: Determines complex cost calculations and projections. Works within a political environment. Calculates the Citywide total of salary and detailed benefit costs for all personnel changes anticipated by department managers for the budget year. Selects, computes, and summarizes information into various financial reports.

Knowledge and Abilities:

Knowledge of:

the City of Mesa budgeting process and procedures;
principles and practices of municipal accounting and/or budgeting;
procedures and methods associated with accounting systems;
PC software for spreadsheet and database applications; and
characteristics of governmental chart of accounts.

Ability to:

apply accounting and budgeting principles and theory in performing work assignments;
understand and interpret accounting/budget records/reports;
develop/revise operating procedures to facilitate completion of work assignments;
analyze program and accounting/budgeting details to identify and apply significant data in preparing budget projections, estimates, and reports;
work on multiple projects at one time; and
interact with City officials, coworkers, and operating agency staff to establish and maintain effective working relationships.

The duties listed above are intended only as general illustrations of the various types of work that may be performed. Specific statements of duties not included does not exclude them from the position if the work is similar, related, or a logical assignment to the position. Job descriptions are subject to change by the City as the needs of the City and requirements of the job change.

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CDP/ah

CS4432.DOCX

EEO-Prof

JOB FCTN-FIN

Non-DOT Safety and Security-N

CDL-N

RESP-N

PAY GRADE: 54

IND-8810

SWORN-No

Non-DOT Random-N

DOT-N

INCREMENTS 43-200