

## SENIOR BUDGET ANALYST

### JOB DESCRIPTION

**Classification Responsibilities:** A Senior Budget Analyst performs advanced budget preparation, analysis, and administrative work in the City's Office of Management and Budget (OMB). Senior Budget Analysts serve in a process leadership role, which includes oversight, coordination, and process improvement responsibilities. General responsibilities include: compilation and analysis of data, and the preparation of tables, charts, and summaries to be used in the City's budget documents and presentations; training City staff on budget procedures; surveying customers; performing site visits at City departments; preparing the annual operating and capital improvement program budget; assisting departments with activity based budgeting and costing; assisting departments with performance management, including the evaluation of budget requests based on related performance information; and providing staff support to quarterly management meetings. Senior Budget Analysts are responsible for the analysis of one or many City departments and funds.

Senior Budget Analysts are responsible for the testing, documentation, and training of the Performance Budgeting system. This includes the design and use of data queries to analyze data integrity as well as content conformity to set standards; and spreadsheet design, analysis of data linking, and formula integrity. Senior Budget Analysts are also responsible for Citywide training for financial structure, database training, financial analysis techniques and general budgetary policy; and for producing and maintaining publications, presentations, and reference documents on the internet (external customers) and the intranet (internal customers).

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

#### ***Forecast Specialization***

Senior 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. Senior Budget Analysts are also responsible for the development and testing of the Forecast system.

#### ***Operations Specialization***

Senior 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***

Senior 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. Senior 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 Budget Analyst primarily by the scope of assignment and complexity of the data analysis. A Senior Budget Analyst is expected to display considerable initiative in meeting deadlines and target dates, as well as identifying ways to improve and/or streamline the process. General guidelines, timetables, and procedures are established by the OMB Department Director, OMB Deputy Director, Budget Coordinators, City code, and state law. Work is reviewed prior to being submitted to the City Manager and City Council for final approval and/or adoption. This class may be attained by non-competitive promotion upon demonstrating proficiency as a Budget Analyst including being employed a minimum of one year as a City of Mesa Budget Analyst and having successfully completed original City probation. In addition, the incumbent must meet established work standards, demonstrate the level of competency necessary to independently perform assigned tasks, and meet the minimum qualifications of the Budget Analyst classification. 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.** Graduation from an accredited college or university with a Bachelor's Degree. 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. Two years of full-time professional-level budget employment with the City of Mesa, or one year of full-time employment with the City of Mesa as a Budget Analyst will also be considered as qualifying experience. Master's Degree from an accredited college or university in Accounting, Finance, Public Administration, Business 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 Bachelor's or Master's Degree in Accounting, Finance, Public Administration, Business Administration or closely related field. Possession of a Certified Public Accountant (CPA) or Certified Government Financial Manager (CGFM). Regression analysis experience, as well as work with statistical packages like SPSS and Forecast Pro (*Forecast Specialization Assignment*).

## 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 personal computer (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. Ability to work on multiple projects at one time. 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:

budgeting process and procedures;  
principles and practices of municipal accounting;  
procedures and methods associated with accounting systems;  
principles of financial, operational, and economic analysis;  
personal computer software for spreadsheet and database applications; and  
characteristics of a governmental chart of accounts.

Ability to:

apply accounting and budgeting principles and theory in performing work assignments;  
maintain concentration on detailed information over an extended period of time when accuracy and speed are important;  
analyze and evaluate data and prepare reports detailing the analysis; and  
interact with City officials, coworkers, department staff, and the general public 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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INCREMENTS 43-200

PAY GRADE: 53

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