

BUDGET ANALYST SERIES

Definition:

Under varying levels of supervision performs a variety of complex, responsible and professional level duties and responsibilities involved in the development, evaluation and review of City budgets; performs a wide variety of complex budget and financial analyses and duties and performs related work as required.

Class Titles

**Budget Analyst I
Budget Analyst II
Senior Budget Analyst**

Essential Duties and Responsibilities:

The responsibilities and essential duties performed on a frequent and recurring basis by an incumbent include the following:

Plans, organizes and coordinates the City's budget process.

Reviews and analyzes proposed budget and Capital Improvement Program (CIP) submissions.

Analyzes revenues and expenditures in comparison to budget estimates, reviews allocations and makes related recommendations.

Recommends changes in budget procedures and processes.

Plans, organizes and implements CIP budgetary functions and maintains records of budget and CIP transactions.

Identifies and resolves complex budgetary and financial issues and problems.

Performs cost/benefit and program cost analyses.

Ensures that approved appropriations and estimated revenues are correctly recorded in the accounting system.

Prepares confidential cost analyses for labor negotiations and related matters.

Generates a wide variety of budget and CIP data and provides specialized data to management as needed.

Serves as administrative liaison to all departments during all stages of budget preparation.

Prepares and presents recommendations resulting from studies.
Assists City departments with budget preparation.

Prepares and/or assists in preparing various budget related resolutions and agenda letters.

Monitors assigned Department's operating and capital budgets to ensure expenditures are appropriately accounted for and activity does not exceed authorized spending limits.

Determines coding for and completes various journal entries.

Assists in developing improved budgetary controls and procedures.

May provide technical guidance to lower level accounting personnel.

May explain and interpret accounting and budgetary policies and procedures to City staff, auditors and outside agencies.

Operates a computer and uses applicable software.

Other Duties and Responsibilities:

Performs other projects/tasks as assigned.

Lifts and carries boxes of accounting records and files weighing 30 pounds or less.

Class Characteristics:

Budget Analyst Series is a single incumbent confidential series within the Administrative Services Department with duties related specifically to budget coordination/preparation and other budgetary matters.

Budget Analyst I is an entry-level class used for the purposes of recruiting and training in the general field of budget administration. An incumbent may have limited experience and normally works under direct supervision performing the more routine duties assigned to this series. Budget Analyst II is a journey level class within the series performing the full range of duties as assigned. Incumbents are experienced in and knowledgeable of general budget administration and are assigned wider responsibilities, greater operating independence and more difficult duties than a Budget Analyst I. A Budget Analyst II normally works under the general supervision of department or division head. A Senior Budget Analyst is the advanced journey level class within the series and is fully trained and completely familiar with municipal budgeting policies and procedures. Under limited supervision, a Senior Budget Analyst performs the most difficult and responsible types of duties assigned on an independent basis.

Upon gaining the necessary knowledge, skills and experience, as well as a current performance rating of "Exceeds Expectation" or better, and at least two years as a Budget Analyst I with the City of Fullerton, an incumbent at this level may be advanced to Budget Analyst II upon approval of the City Manager.

Upon gaining the necessary knowledge, skills and experience, as well as a current performance rating of "Exceeds Expectation" or better, and at least two years of experience as a Budget Analyst II for the City of Fullerton, an incumbent at this level may be advanced to Senior Budget Analyst upon approval of the City Manager.

Supervision Received;

- Receives general direction from the Budget and Purchasing Manager.

Contacts and Relationships:

A Budget Analyst I has the majority of their interaction within the Administrative Services Department and with other City department staff. A Budget Analyst II has wider contact including substantial interaction with other City departments, including department heads. At the Senior Budget Analyst level, interaction increases to include the City Manager and City Council.

Qualification Guidelines:

The knowledge and abilities which are required to perform the duties and responsibilities of this class are as follows:

Knowledge of:

Accounting principles, practices, standards and controls to include principles and methods of public finance, revenue sources and expenditure processes.

Municipal government structure and programs.

Municipal budget and accounting systems.

Methods of budgetary research and analyses.

Methods of cost-benefit analysis.

English usage, spelling grammar and punctuation.

Report writing techniques.

Computerized financial accounting systems and other computer applications as they relate to area assigned.

Business math.

AND

Ability to:

Implement governmental budgeting principles and processes and coordinate an effective municipal budget process.

Assess appropriateness of budget requests and recommendations.

Make accurate mathematical and statistical calculations.

Analyze complicated data, make recommendations and prepare reports.

Organize work, adhere to multiple deadlines and handle multiple projects.

Handle job stress and maintain composure in public settings.

Communicate effectively orally and in writing.

Read and write at the level required for successful job performance.

Establish and maintain effective relationships with those contacted in the course of work.

Operate a personal computer and use applicable software programs.

Understand and carry out oral and written instructions independently and exercise independent judgment.

Maintain the confidentiality of sensitive budget and employee relations data.

Education and Experience:

Any combination of education, training, and experience that would likely provide the knowledge, skills, and abilities to successfully perform in the position can be considered as qualifying. A typical combination includes:

A Bachelor's Degree in Finance, Accounting, Public Administration or a closely related field from an accredited college or university to include course work in public finance, statistics and municipal accounting.

AND

Budget Analyst I:

One year of experience in the preparation and monitoring of budgets and/or in the areas of financial, administrative, or management analysis including the conduct of financial analyses, operation audits, and management studies.

Budget Analyst II:

Two years of experience at the Budget Analyst I level or equivalent in a public sector setting.

Senior Budget Analyst:

Two years of experience at the Budget Analyst II level or equivalent in a public sector setting.

Special Requirements:

Must be able to work a flexible schedule to accommodate City needs.

The City of Fullerton's Conflict of Interest Code requires that the Budget Analyst I, Budget Analyst II and Senior Budget Analyst file financial disclosure statements in accordance with state and local laws.

Per California Government Code §3100 - 3109, all public employees are declared to be disaster service workers and must take and subscribe to the oath or affirmation as required.

Physical Tasks and Working Conditions Include the Following:

Work is performed in an office environment and requires sitting for prolonged periods of time using a computer keyboard and screen. The incumbent stands, walks, twists, reaches, bends, crouches and kneels and may grasp, push, pull, drag and lift boxes of accounting records and files weighing 30 pounds or less. The incumbent must be able to meet the physical requirements of the class and have mobility, vision, hearing and dexterity levels appropriate to the duties to be performed.

Fair Labor Standards Act Designation:

Budget Analyst I: Non-exempt.

Budget Analyst II: Exempt.

Senior Budget Analyst: Exempt.

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Established October 1996