



Budget Officer

Purpose of the role:

Under administrative direction, participates in the activities and operations of the Administration Division within the Finance Department including preparing the City's preliminary and final budgets; coordinates assigned activities with other divisions, departments and outside agencies; prepares regular financial reports and analysis and provides highly responsible and complex administrative support to the Finance Director.

Distinguishing Characteristics:

The Budget Officer has responsibility for planning, organizing and implementing major programs, services and operations related to the assigned area. Incumbents in this class are responsible for working with departments to develop and implement City-wide goals and objectives and for planning, organizing and directing the work of City departments administrative staff responsible for budget. Assignments are broad in scope and are carried out with a significant degree of latitude and independence. The Budget Officer is distinguished from a Senior Accountant or Management Analyst in that an employee in the former class makes budget presentations to Council and is responsible for assigning and managing all work related to budget processes and measuring and evaluating results.

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.

Essential Duties and Responsibilities:

- Participate in the activities and operations of the Administration division including preparing the City's budget; plan, direct and manage the coordination of City-wide budget activities, including benchmarking, performance measurements and community standards review.
- Manage and participate in the development and implementation of goals, objectives, policies and priorities for assigned programs; recommend and administer policies and procedures.
- Monitor and evaluate the efficiency and effectiveness of service delivery methods and procedures; recommend, within departmental policy, appropriate service and staffing levels.
- Conduct cost/benefit analyses.
- Prepare Cost Allocation Plan and user fee studies for the City.
- Review departmental staff reports related to the budget.
- Develop the forecast of funds needed for staffing, equipment, materials and supplies; monitor and approve expenditures; implement adjustments. Keep Financial Strategic Plan Model updated with these forecasts.
- Develop and maintain budget-related report programs; prepare regular financial reports to include budget-to-actual revenue and

expenditure information; analyze significant variances and present information to City management.

- Prepare adopted budget for merge to the financial information system.
- Provide highly responsible and complex administrative support to the Finance Director.
- Attend and participate in professional group meetings; stay abreast of new trends and innovations in the field of public finance.
- Respond to and resolve difficult and sensitive citizen inquiries and complaints.
- Performs related duties as required

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

Knowledge of:

- Operational characteristics, services, and activities of a municipal accounting program.
- Principles and practices of general, fund and governmental accounting, including financial statement preparation and methods of financial control and reporting.
- Principles and practices of program development and administration.
- Methods and techniques of cost accounting, internal controls and auditing.
- City functions and associated financial management and reporting issues.
- Principles and practices of business data processing particularly related to the processing of accounting and financial information.
- Principles and practices of municipal budget preparation and administration.
- Principles and practices of performance measurement.
- Principles and practices of management, supervision, training and performance evaluation.
- Pertinent federal, state and local laws, codes and regulations.

***Desired
Minimum
Qualifications:***

Ability to:

- Oversee and participate in the management of a comprehensive municipal budget program.
- Participate in the development and administration of division goals, objectives and procedures.
- Prepare and administer large and complex budgets.
- Prepare clear and concise administrative and financial reports.
- Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.
- Research, analyze and evaluate new service delivery methods and techniques.
- Interpret and apply federal, state and local policies, laws and regulations.
- Read and interpret documents such as laws, regulations, and reporting requirements pertaining to municipal finance.
- Speak effectively before groups and employees of the organization.
- Communicate clearly and concisely, both orally and in writing.

- Establish and maintain effective working relationships with those contacted in the course of work.
- Respond and perform assigned duties in the event of a City-declared emergency.

Competencies:

- Effective Communicator
- Team Builder
- Strategic Thinker
- Results Oriented
- Problem Solver and Decision Maker
- Planner and Organizer
- Technically Knowledgeable

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

Education and Experience Guidelines:

Education/Training:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in finance, accounting, public or business administration or a related field.

Experience:

Five years of increasingly responsible public finance or accounting experience including three years of budget development responsibility.

Licenses; Certificates; Special Requirements:

A valid Class C California driver's license is required.

Physical and Environmental Conditions:

Physical: Sufficient physical ability to work in an office setting; sit, stand, walk, reach, twist, turn, kneel, bend, squat, and/or stoop for prolonged periods of time; perform duties requiring grasping, repetitive hand movement, and fine coordination; and operate office equipment. **Vision:** See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents and to operate office equipment. **Hearing:** Hear in the normal audio range with or without correction.

Environment: Standard office setting; frequent interaction with City staff, officials, and outside auditors.

*Class specifications are only intended to present a descriptive summary of the range of duties and responsibilities associated with specified positions. Therefore, specifications **may not include all** duties*

*performed by individuals within a classification. In addition, specifications are intended to outline the **minimum** qualifications necessary for entry into the class and do not necessarily convey the final qualifications of incumbents within the position.*

Pursuant to California Government Code Section 3100, all public employees are required to serve as disaster service workers subject to such disaster service activities as may be assigned to them by their supervisor or by law.

Date Adopted: 11/16/04

Date Revised: