

CLASS SPECIFICATION

Senior Budget Analyst

Code Number: _____

GENERAL PURPOSE

Under general direction, coordinates and participates in the formulation, administration and revision of the Commission's annual budget; performs difficult and responsible analyses which support Commission-wide functions, programs and initiatives in budget development and implementation; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

A Senior Budget Analyst coordinates and performs a wide variety of statistical and management analyses associated with formulation, presentation and administration of the Commission's annual budget. The incumbent works with a significant degree of independence and is expected to exercise considerable latitude in selecting and applying analytical and statistical approaches and methodologies and making sound decisions regarding proposals and recommendations based on analyses performed.

Senior Budget Analyst is distinguished from Budget Analyst by the incumbent's responsibility for performing complex financial and budgetary analyses requiring more in-depth understanding of the Commission's funding sources and associated requirements and its financial and budgetary systems.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class.

Coordinates and participates in formulating, implementing and administering the Commission's annual budget and budget revisions; prepares budget calendar, request submittal forms and preparation manuals and instructions; generates and provides Commission managers historical budget and expenditure data and advice on budget request preparation and modification; analyzes budget requests and proposals for compliance with budget development guidelines and funding source requirements; develops projections of revenue carry overs, potential new grants and expected revenues for designated on-going programs; develops indirect cost allocations for incorporation in budget drafts; develops budget drafts for executive team review and approval.

Generates and analyzes quarterly and periodic budget monitoring reports; notifies the Budget Manager and other section managers of potential problems and recommended courses of action; assists section managers in analyzing and researching the basis for budget-expenditure variances;

prepares budget status reports for management and Commission review, including narrative explanations and supporting exhibits and schedules.

Analyzes the impacts of new funded programs or program changes on the adopted budget; drafts budget revision reports for review and approval by the Housing Commission and Housing Authority, if required; modifies the Commission Activity-based budget accordingly; advises section managers on strategies and alternatives to accomplish desired program results within the parameters of approved funds and funding source requirements.

Develops and updates revenue and expenditure estimates and long-range financial forecasts, by revenue source and sub-activity budget units; reviews data, assumptions and forecasts with Commission managers and researches variances and discrepancies; drafts presentation materials for use in conducting briefings; generates alternative long-term forecasts of financial data based on alternative scenarios for management review.

OTHER DUTIES

Conducts training of section managers and staff on annual budget development procedures; makes presentations to managers and others on budgetary matters.

Prepares the annual cost allocation plan for review by outside auditors.

Evaluates the Commission's budget development and presentation processes and makes recommendations for improvement.

Reviews and approves requests to fill authorized positions.

Performs special cost, trend, impact and other analyses and drafts reports and recommendations on assigned projects.

Works with Information Systems staff to update and modify the Commission's financial system to incorporate new budget formats and data; assists in implementation of the Commission's new financial system.

Supervises, assigns and evaluates the work of other professional budget staff; coordinates the work of administrative support staff assisting in entering and compiling budget information.

Acts for the Budget Manager in that individual's absence.

DESIRED MINIMUM QUALIFICATIONS

Knowledge of:

Theory, principles, practices and techniques of public agency budget development and financing; applicable state and federal law and regulations governing budgeting and financing of public

agencies; principles and practices of financial forecasting and modeling; computer tools and software, particularly as related to statistical analysis, modeling, data management and manipulation; advanced principles, practices and methods of administrative, budgetary, economic and procedural analysis; principles and practices of sound business communication; correct English usage, including spelling, grammar and punctuation; Commission functions and associated financial management and budgeting issues; the Commission's automated general ledger system, its usage and requirements; basic principles and practices of supervision.

Ability to:

Operate a personal computer and spreadsheet, wordprocessing, financial modeling and other standard software; analyze and make sound recommendations on financial and budget data; select appropriate methodologies and perform mathematical and statistical calculations and analyses; prepare clear, concise and comprehensive financial analyses, reports and presentation materials; exercise sound independent judgment within general policy guidelines; understand, interpret, explain and apply federal, state, local and Commission laws, regulations and policies regulating financial accounting, reporting and recordkeeping; evaluate budget and financial information and make sound recommendations within areas of responsibility under intensive deadlines; make clear, effective oral presentations to groups and individuals; establish and maintain effective working relationships with Commission managers, employees and others encountered in the course of work.

Training and Experience:

A typical way of obtaining the knowledges, skills and abilities outlined above is graduation from a recognized four-year college or university with a major in finance, accounting or a closely related field; and at least three years of progressively responsible experience performing complex financial, statistical and budgetary analyses, preferably in a governmental agency; or an equivalent combination of training and experience.

PHYSICAL AND MENTAL DEMANDS

The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands

While performing the duties of this class, an employee is regularly required to sit; talk or hear, in person and by telephone; use hands repetitively to finger, handle, feel or operate standard office equipment; and reach with hands and arms. An employee is frequently required to walk and stand and to regularly lift up to 10 pounds.

Specific vision abilities required by this job include close vision and the ability to adjust focus.

Mental Demands

While performing the duties of this class, an employee is regularly required to use written and oral communication skills; read and interpret financial and statistical data, information and documents; analyze and solve problems; use math and apply mathematical reasoning and abstract statistical concepts; observe and interpret people and situations; learn and apply new information or skills; perform highly detailed work on multiple, concurrent tasks with frequent interruptions; work under intensive deadlines; and interact with Commission managers, employees and others encountered in the course of work.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The employee works under typical office conditions and the noise level is usually quiet.