



City of Irving Job Description

Budget Manager

FLSA Status:	EXEMPT	Job Department:	Financial Services (Budget Division)
Job Code:	17091	Reports To (Job Title):	Finance Director

PURPOSE

To oversee City-wide budget preparation and monitoring, including the development of multi-year revenue and expenditure projections, development of new revenue sources, coordination of the annual operating and capital budget development process, and the monitoring of current revenues and expenditures for variance against the adopted budget. The position also provides training to city employees on budget preparation.

ESSENTIAL DUTIES AND RESPONSIBILITIES

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily.*

- Coordinate the preparation and monitoring of City-wide operating and capital budgets, including developing and presenting procedures, requirements, instructions, and schedules for budget input, review, and modifications.
- Provide functional supervision to the Compensation Administrator to integrate salary surveys, position control analysis, and salary & benefit cost analysis into the budget process and budget forecasting models. Coordinate both the annual benchmark analysis of civil service positions and ad hoc survey of salaries by position.
- Provide functional supervision to the CIP Coordinator to integrate CIP budgets, expenditures, bond authorizations, and multi-year capital planning into the budget. Provide oversight and integration of the capital budget into the City's overall budget planning and preparations.
- Manage, direct, monitor, and support division staff members, including advising staff members on complex issues, providing guidance and leadership, and preparing performance evaluations.
- Review and approve expenditures, which includes placing contracts and other items on City Council agenda.
- Direct and support the development and implementation of financial and statistical measures to evaluate the existing and future financial environment of the City.
- Present and explain complex budgetary and financial analyses and make sound recommendations to departments, senior management, and City Council through the use of detailed charts, graphs, and other audio-visual aids.
- Prepare department strategic and operating plan including identifying, documenting, monitoring, and evaluating goals, objectives, priorities, and activities. Coordinate the integration of strategic plan goals, strategies and performance measures into the budget process.
- Work with the Accounting Manager to develop and update monthly financial reports for budgetary control. Make projections concerning revenues and expenditures for the remainder of the fiscal year and make recommendations to adjust budgets and expenditure authorizations to maintain structural balance between revenues and expenditures.
- Prepare City Manager's correspondence related to budget processes and documents.
- Coordinate citizen input into the budget through the use of public forums, e-mail, and online input.

- Make presentations and write articles to inform the public and various civic groups concerning the City's budget and financial condition as well as city initiatives and programs at the direction of city management. Maintain budget-related information on the city's website.
- Responsible for the planning, coordination, and presentation of the annual Budget Retreat where the recommended budget is presented to council for review and discussion; Including: the posting of legal notices, preparation and presentation of several presentations and reports, compilation of data based on ad-hoc queries during the retreat, and recommendations and advice to council concerning budget priorities and resource allocation.
- Review and process budget amendments, which includes placing items on Council agenda and preparing financial reports to Accounting and external auditors tracking changes in budget amounts from the initial adopted budget.

OTHER DUTIES AND RESPONSIBILITIES

- Assist the Accounting division with audit preparation, including the development and review of certain portions of the transmittal letter, audit footnotes, and supplemental tables and schedules.
- Assist Finance/Treasury with the preparation of documents and schedules related to the issuance of long-term debt for capital projects and equipment purchases. Make presentations to rating agencies regarding budget conditions, financial forecasts and the purposes for issuance of long-term debt.
- Assist other departments in the review of major contracts and proposals
- Participate as both a project leader and a team member on various efficiency projects and analyses of areas that pertain to budgetary or financial controls and operations.
- Coordinate with members of the Executive Team on the city's legislative agenda, including written and oral testimony before the legislature and coordination with other governmental entities to build coalitions on common issues related to taxation, revenue, and other financial areas.

SUPERVISORY RESPONSIBILITIES

Functional and Technical Supervision - Regular responsibility for giving direction and guidance to employees as a lead worker, project manager or internal advisor. As an ongoing part of the position, the employee can expect to supervise approximately 2 employees.

Organizational Supervision - Applies to full personnel management responsibilities including selection, discipline, grievances and formal performance evaluations for a position's direct reports plus all employees reporting up through subordinates, which will include approximately 2-5 employees.

FINANCIAL / BUDGETARY RESPONSIBILITY

- Responsible for the development, planning, approval and monitoring of the city's annual \$691 million operating and capital budgets for all city funds, departments, and programs.
- Advise and supports the Finance Department on the issuance and administration of long-term debt for all city operations totaling \$687 million in principle outstanding.
- Assist Treasury and the city's financial advisors in the development of an annual debt capacity model.
- Directly responsible for the Budget Division's budget of over \$640,000 and the General Fund Non-Departmental budget of over \$19 million. Has the authority to sign checks in the absence of the CFO and Finance Director.

QUALIFICATIONS:

The requirements listed below are representative of the knowledge, skill, and/or ability required.*

EDUCATION

- Equivalent to a Master's degree in Public Administration, Business Administration, or a related field.

EXPERIENCE

- Five (5) years of related experience including at least two (2) years of supervisory experience.

CERTIFICATES, LICENSES, REGISTRATIONS

- Certified Government Finance Officer or similar certification is *preferred*.

KNOWLEDGE OF

- Accounting: Principles and practices including internal controls, cash management, general ledger, accounts payable, and accounts receivable.
- English Language: The structure and content of the English language, including the meaning of words and grammar.
- Communication: Techniques and methods of communication, including alternative ways to inform and entertain via written, oral, and visual media.
- Administration and Management: Principles and processes involved in business and organizational planning, coordination, and execution. This includes strategic planning, resource allocation, manpower modeling, leadership techniques, and production methods.
- Supervision: Personnel motivation, interviewing, hiring, oversight, evaluation, and discipline.
- Applied Math: Concepts such as fractions, percentages, ratios, and proportions; additionally, Algebra
- Statistical Principles: Principles and processes dealing with the collection, analysis, interpretation, and presentation of quantitative data.
- Budget Management: Developing plans and budgets; comparing them against actual activity.
- Office Software: Current word processing, presentation, spreadsheet, Enterprise Resource Planning (ERP), and database programs used by the City.
- Tyler Munis (ERP, *preferred*): Strong understanding of how to operate this Enterprise Resource Planning software.

SKILLS AND ABILITIES IN

- Presentation: Presenting information and direction about budgetary and financial issues and related topics to a wide variety of audiences with a varied understanding and comprehension of financial and municipal government concepts including management, council, city employees, civic organizations and the general public.
- Written Expression: Communicating ideas and information in writing so that others can understand. Includes routine reports and correspondence, detailed analytical reports, and articles for public information.
- Accuracy: Paying attention to detail in dealing with numbers, words, documents, and ideas.

- Cooperation: Establishing and maintaining positive working relationships with those contacted in the course of work.
- Critical Thinking: Using logic and analysis to identify the strengths and weaknesses of different approaches.
- Problem Analysis: Identifying and defining problems, collecting data, establishing facts, and drawing valid conclusions.
- Customer Service Orientation: Actively looking for ways to help people and improve processes.
- Multi-tasking: Working with multiple software packages, tasks, and projects simultaneously.

GUIDANCE RECEIVED

Priorities and Policies

Organizational priorities and policies, along with professional standards and best practices, guide decisions and direction or advice given to others. Typically makes recommendations to superiors after considering various alternatives. Proactively addresses needed changes to policies, methods and procedures and obtains approval.

CONTACTS

Deals frequently with a wide variety of outside contacts, including City Council, residents, civic organizations, various consultants and advisors, external auditors, peers in other local governments, state organizations, state legislative representatives and committees, and the news media

EQUIPMENT AND PROPERTY

Responsible for various office equipment and furnishings.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job.*

The employee is required to talk and sit. Occasionally, s/he is required to lift up to 50 lbs.

WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.*

Most work takes place in a standard office environment, with monthly travel to other office, presentation or project sites.

* Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Note: A class specification is a general listing of duties, responsibilities, knowledge, skills, and abilities required of an incumbent assigned to a particular class of work. There may be one or multiple positions assigned to a single classification; therefore, the class specification lists those work attributes that are common to every incumbent in the class.