



City of Irving Job Description

Senior Budget and Financial Analyst

FLSA Status:	EXEMPT	Job Department:	Financial Services (Budget Division)
Job Code:	F241	Reports To (Job Title):	Budget Manager

PURPOSE

Assists in the development of the annual operating budget and capital budgets, serves as a budget liaison to assigned departments, prepares and presents highly complex financial and statistical analyses in support of capital planning and other budget related programs.

ESSENTIAL DUTIES AND RESPONSIBILITIES

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

- Coordinate and monitor setup of funding and expenditure strings for operating and capital projects in Munis.
- Assist Grant Accountant with budget preparation, monitoring and reconciliation of local, state and federal grant administration in grant master, project ledger and general ledger.
- Serve as liaison with assigned departments in coordinating the preparation and development of the Annual Operating and Capital Budget. Assist departments with day to day budget issues.
- Prepare the annual Operating Budget Documents (Draft, Proposed, and Adopted).
- Assist in developing and monitoring strategic plan goals, strategies and performance measures. Integrates the strategic plan into the budget process.
- Develop comparative statistics and graphic depiction of trends, financial and statistical analysis, benchmarking surveys, and performance measurement for assigned departments.
- Construct and update sophisticated financial and statistical models.
- Process budget transfers in Munis for Financial Services and Non-Departmental orgs.
- Monitor current year budgets and conduct trend analysis.
- Complete major and minor analyses and case studies suggested by the City Manager's Office and the Budget Manager.
- Process quarterly and annual local, state and federal government surveys.

OTHER DUTIES AND RESPONSIBILITIES

- Assist the Accounting division with audit preparation, including the development and review of certain audit footnotes and supplemental tables and schedules.
- Participate on various innovation projects and analysis of areas that pertain to budgetary or financial controls and operations.
- Design, plan, and conduct citywide training programs for computerized financial systems including the budget, project ledger and general ledger systems; advise departments on proper accounting for revenues and expenditures.
- Serve as staff support for the city's boards and commissions.

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 1-3 employees.

FINANCIAL / BUDGETARY RESPONSIBILITY

Responsible for updating and monitoring the annual citywide municipal cost of service study. Errors and inaccuracies in these analyses can have major financial impacts on municipal budgets with major repercussions if the data or recommendations prove faulty.

QUALIFICATIONS:

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

EDUCATION

- A Master's in Accounting, Public Administration, Business Administration, or a related field; *or*
- An equivalent qualification, such as a Bachelor's in a related field of study *and* two (2) years of additional experience.

EXPERIENCE

- Two (2) years of related experience in municipal government coordinating the preparation of the annual operating and capital budget.

CERTIFICATES, LICENSES, REGISTRATIONS

- None

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.
- Communications: Techniques and methods of communication, including alternative ways to inform and entertain via written, oral, and visual media.
- 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, 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.
- Written Expression: Communicating ideas and information in writing so that others can understand, which 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.
- Data analysis: Constructing and maintaining data-driven models to use illustrating scenarios and projecting changes in financial conditions based on multiple variables.
- 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

General Standards

A range of professional standards and methods guide completion of assignments and decisions made. Adherence to policy, City procedures and general supervisory direction is expected. Position incumbents are responsible for making recommendations about changes to methods, procedures and policies and helping to implement changes.

CONTACTS

This position has occasional contact with peers in other governmental organizations, city contractors and consultants, City Council and the general public.

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.