

City of Fort Worth, Texas Job Description

Classification Title	Senior Budget Analyst		
Job Code:	PR2300	Job Family:	Professional
Pay Grade	612	Date Reviewed:	07/14/2015
FLSA Status	Exempt	Date Revised:	01/02/2019

GENERAL SUMMARY

Manages, reviews, monitors, analyzes and assists in the development of multiple, complex citywide operating and capital budgets to ensure compliance with financial policies, rules and regulations. Provides a wide variety of detailed analytical and research support for multiple departments, city staff and City Council to facilitate decision-making, and recommends comprehensive solutions for funding or operational concerns and issues to departments, city staff and senior management.

ESSENTIAL DUTIES & RESPONSIBILITIES

The intent of this job description is to provide a representative summary of the major duties and responsibilities performed by incumbents of this job. Incumbents may be requested to perform job-related tasks other than those specifically presented in this description.

1. Supervises staff, which may include prioritizing and assigning work; ensuring staff is trained; ensuring employees follow policies and procedures; and, maintaining a healthy and safe working environment.
2. Participates and leads lower level analysts in the development, management and analysis of multiple citywide capital and operating budgets related to the largest, most complex departments whose budgets involve multiple complex funds and new projects that require complex budgetary approaches. Ensures compliance with designated financial policies, rules and regulations; identifies and analyzes potential revenue and cost saving opportunities; provides analysis and research in support of assigned department and divisions; prepares Mayor & Council Communications; and updates five-year capital plan.
3. Works on five-year expense/expenditure and revenue forecasts, property tax analyses, and projections for sales tax.
4. Conducts various analyses on departmental financial and operational data. The analyses may include cost/benefit, trending, and root cause analysis.
5. Assists departments and senior management staff in ensuring compliance with annual operating, capital outlay, and capital improvement plans or adopted operating budgets; monitors annual bond sales, reviews project management reports, approves requests for appropriations and tracks expenditures and surplus funding sources to provide decision making tools; and analyzes and sets criteria for closing capital projects.

6. Participates in assigned analytical support functions that have Citywide impact; prepares annual budget ordinances; participates in the creation of new budget processes, such as fund review process or new process for vehicle and equipment purchases; participates in capital planning and projection of multi-year project expenditures; generates operating and capital project expenditure update reports; and completes forecasts on operating budgets.
7. Calculates and compiles tax reports; completes periodic forecasts including the publication of documentation to explain and support the projected forecast; conducts research and contacts agencies for data collections and benchmark analyses; and creates ad hoc reports and research as requested by City Council, senior management, other committees and citizens.
8. Develops, coordinates and leads training workshops; provides instruction on budget processes and methods; facilitates implementation of new systems; and updates training materials; serves as a subject matter expert.
9. Coordinates with Accounting Division and various departments to research unusual and unnatural balances in departments' funds; analyzes the resolution for unusual balances; defines any remaining fund balances; and makes recommendations regarding use of balances.
10. Acts as liaison for Budget and Research Division on various committees and commissions; and provides data, analyses, reporting and other information, as needed to facilitate accomplishment of group goals and/or support City positions or recommendations.
11. Recommends comprehensive solutions to assigned departments, City staff and senior management regarding funding or operational concerns and issues.
12. Drafts and originates Mayor and Council communications; reviews, revises and updates departmental Mayor and Council communications according to established deadlines; communicates with originating department to clarify concerns or issues and eliminate errors; and prepares appropriation and supplemental appropriation ordinances, as needed.
13. Prepares financial forecasts; identifies possible budget overruns; coordinates appropriate solution with departments, CFO and City Manager's Office.
14. Participates in special projects including research of new programs and services, budget analysis and preparation, and feasibility analyses; prepares and presents reports.
15. Performs other related duties as required.
16. Adheres to assigned work schedule as outlined in the Department and City attendance policies and procedures; ensures all behaviors comply with the City's Personnel Rules and Regulations.

KNOWLEDGE, SKILLS & ABILITIES

- **Knowledge of:**

- Methods and techniques used to conduct a variety of analytical studies.
- Complex principles and practices common to the functional area of assignment, (e.g. budget, human resources, etc.).
- Management business practices, principles, functions and processes.
- Project management.
- Basic trends and current development of management theory and organizational behavior.
- Organization objectives, procedures, policies and regulations.
- Advanced municipal accounting principles and economics.
- Principles, practices, methods and techniques of report preparation.
- Principles and procedures of record keeping.
- Methods of research, program analysis, and report preparation.
- Office equipment including computers and supporting word processing, presentation, and spreadsheet applications.
- Pertinent Federal, state and local laws, codes and regulations.
- **Skill in:**
 - Economic analysis/forecasting.
 - Organization and time management.
 - Leading other employees.
 - Accounting and financial calculations.
 - Advanced spreadsheet functions (i.e. pivot tables, lookup tables, etc.).
 - Customer service and diplomacy.
 - Critical thinking and reasoning.
 - Numbers/information reconciliation.
 - Preparing and presenting in meetings.
 - Analyzing historical analyzing historical data and identifying and understanding trends.
 - Designing and producing budget control systems to facilitate planning, scheduling and reporting activities and enhance the scope, schedule and budget for project management and service delivery throughout the City.
- **Ability to:**
 - Communicate clearly and effectively, both orally and in writing.
 - Apply practices, theories, techniques and management methodology to assigned area.
 - Analyze historical data and identify trends.
 - Clearly and concisely communicate findings and recommendations to senior management.
 - Produce ad hoc reports for City Council and other committees.
 - Use City's capital projects and programs tracking software and related processes.
 - Foresee potential issues and make concise and accurate decisions and recommendations by considering available options.
 - Delegate and manage multiple deadlines and priorities.
 - Work with departmental fiscal staff to make concise and accurate decisions.
 - Prepare clear and concise reports.
 - Independently prepare correspondence and memoranda.

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

MINIMUM JOB REQUIREMENTS

Master's degree from an accredited college or university with major course work in Public Administration, Finance, Business Administration, or related field and four years of experience in budget management, finance, research analysis or related field.

OTHER REQUIREMENTS

None

WORKING CONDITIONS

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

Depending on assignment, positions in this class typically require touching, talking, hearing, seeing, grasping, standing, stooping, kneeling, crouching, reaching, walking and repetitive motions.

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

Sedentary Work – Depending on assignment, positions in this class typically exert up to 10 pounds of force occasionally, a negligible amount of force frequently, and/or or constantly having to lift, carry, push, pull or otherwise move objects. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.