

City of Fort Worth, Texas Job Description

Classification Title	Budget Analyst II		
Job Code:	PR1171	Job Family:	Professional
Pay Grade	611	Date Created:	06/11/15
FLSA Status	Exempt	Date Revised:	05/15/23

GENERAL SUMMARY

Manages, reviews, monitors and assists in the development of citywide operating and capital budgets. Performs research and analysis of operations and financial information to assist in development of budget strategies. Works with departments and senior management staff to ensure compliance with the annual capital expenditure plans or adopted operating budgets, develops and monitors information and reports in order to provide decision-making tools related to capital plans and fund projections, and creates new funds to address needs of department.

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. Participates in the development, management and analysis of multiple citywide capital and operating budgets related to larger, more complex departments whose budgets involve multiple 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; and prepares Mayor & Council Communications.
2. Conducts various analyses on departmental financial and operational data. The analyses may include cost/benefit, trending, and root cause analysis.
3. 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.
4. Participates in assigned analytical support functions; coordinates periodic budget forecasts; conducts policy and operational research for implementation of management initiatives; 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.

5. 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.
6. Calculates and compiles tax reports; completes summary narratives for forecasts and analyses; 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.
7. Develops, coordinates and leads training workshops; provides instruction on budget processes and methods; facilitates implementation of new systems; and updates training materials.
8. 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.
9. 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.
10. Performs other related duties as required.
11. 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.).
 - Advanced municipal accounting principles and economics.
 - Methods and techniques of incorporating quality improvement principles into assigned operational area.
 - Management business practices, principles, functions and processes.
 - Project management.
 - Funding types and restrictions.
 - Basic trends and current development of management theory.
 - Organization objectives, procedures, policies and regulations.
 - 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 and spreadsheet applications.
 - Microsoft Office products and City financial systems.

- Pertinent Federal, state and local laws, codes and regulations.
- **Skill in:**
 - Economic analysis/forecasting.
 - Organization and time management.
 - Accounting and financial calculations.
 - Advanced spreadsheet functions (i.e., pivot tables, lookup tables, etc.).
 - Mathematics.
 - Customer service and diplomacy.
 - Critical thinking and reasoning.
 - Numbers/information reconciliation.
 - Preparing and presenting in meetings.
- **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 and understand trends.
 - Develop training materials and conduct workshops on improved budget systems and procedures.
 - Use City's capital projects and programs tracking software and related processes.
 - Prepare clear and concise reports.
 - Provide guidance and subject matter expert advice.
 - Independently prepare correspondence and memoranda.
 - Make concise and accurate decisions and recommendations without direct supervision.
 - Manage multiple deadlines and priorities.
 - Communicate clearly and concisely, both orally and in writing.
 - 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 two 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, 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.