

Budget/Financial Analyst, Finance Department

City of Dunedin, Florida
Class Description

Position Title: Budget/Financial Analyst
Finance Department

GENERAL STATEMENT OF JOB

Under general supervision, performs various duties in the daily operations of the Budget Section of the Finance Department ensuring compliance with all applicable accounting/budgeting standards and methods and principles of sound financial management. Duties include assistance with preparing annual budget, capital improvements plan, Municipal Business Plan, and budget amendments and transfers. Reports to the Budget Manager.

SPECIFIC DUTIES AND RESPONSIBILITIES

ESSENTIAL JOB FUNCTIONS

The duties recorded below are representative of the duties of the class and are not intended to cover all the duties performed by incumbents(s) of any particular position.

Performs variance and budget analysis in conjunction with monthly reporting and annual budget development.

Performs general administrative work as required, including preparing Commission meeting agenda items, PowerPoint presentations and other Commission meeting exhibits, developing guidance and procedure documents for staff, and reviewing management reports.

Performs a wide range of financial reporting including fund modeling, analytical reports, and studies on tax, utility rates and/or municipal services, other analysis and projects as assigned.

Requires the ability to apply advanced accounting, finance and budgeting theory supporting the governmental sector (i.e. fund accounting, internal control systems, etc.) to include integration of related functions.

Performs duties related to Utility Billing and City Budget with assistance to the Accounting Section as needed.

Assists with preparation of the City's annual business plan, budget and capital improvements plan, and CAFR primarily by extraction/queries from financial database and

creation of reports using Microsoft Access and/or Excel. Performs month-end/year-end closing activities as needed. Routine accounting duties include but are not limited to preparing/reviewing journal entries, budget entries, bank and other reconciliations, maintaining general ledger, verifying transactions, cash receipts, accounts/liens receivable, accounts payable, investments, and standard entries.

Assists Accounting Manager and Auditors with the annual audit by preparing/reviewing audit schedules.

Assists in developing and maintaining city-wide financial policies/procedures manual.

ADDITIONAL JOB FUNCTIONS

While the following tasks are necessary for the work of the unit, they are not an essential part of the purpose of this position and may also be performed by other unit members.

Performs general office work as required, including typing reports and correspondence, entering data into the computer, copying and filing documents, and answering the telephone.

Assists both internal and external customers. Performs related duties as required.

MINIMUM TRAINING AND EXPERIENCE

Requires a Bachelor's degree in accounting or related field with two years of experience in accounting and/or financial or budget analysis.

An equivalent combination of training and experience which provides the required skills, knowledge and abilities may be considered.

SPECIAL REQUIREMENTS

Must possess a valid Florida driver's license.

Requires strong proficiency with Microsoft Word, Excel, PowerPoint, and database programs (preferably Access) and the ability to utilize financial accounting system applications. Experience in Tyler Munis systems is preferred.

This position is Category B for the purposes of Dunedin Emergency Management. The incumbent may be required to remain onsite/ available as scheduled during times of emergency as declared by the City/County Commission or City Manager, or report for

duty immediately following an emergency event.

PERFORMANCE INDICATORS

Knowledge of Job: Has thorough knowledge of the methods, procedures and policies as they pertain to the performance of essential duties of the Budget/Financial Analyst. Is knowledgeable in the laws, ordinances, standards and regulations pertaining to the specific duties and responsibilities of the position. Has knowledge of the areas of accounting and journal entries, budget development and analysis, is able to make sound, educated decisions. Is able to take the initiative to complete the duties of the position without the need of direct supervision. Has the ability to plan, organize and prioritize daily assignments and work activities. Is able to read and interpret complex materials pertaining to the responsibilities of the job. Is able to assemble and analyze information and make written reports and records in a concise, clear and effective manner. Knows how to make public presentations. Clearly understands any occupational hazards and adheres to all safety precautions inherent in performing the essential functions of the work. Has the ability to speak and understand the English language.

PERFORMANCE APTITUDES

Data Utilization: Requires the ability to extrapolate and integrate data and/or information for predicting, anticipating and planning for future events impacting the organization. Includes determining strategic and tactical decisions at the highest organizational levels of authority and responsibility. Is able to compile, organize and utilize various financial information necessary in the preparation of organizational and departmental budgets, and knows how to prepare and monitor budgets.

Human Interaction: Requires the ability to exchange information for the purpose of obtaining information or clarifying details. Performs such within well- established policies, procedures and standards. Knows how to maintain effective relationships with personnel of other departments, professionals and members of the public through contact and cooperation.

Equipment, Machinery, Tools and Materials Utilization: Requires the ability to use, operate and/or handle equipment such as a computer, recorder, copier, calculator, telephone, and microfiche. Has knowledge of and skill in the use of modern office equipment, including computers.

Verbal Aptitude: Requires the ability to use synthesis data and information, as well as reference, descriptive, design, advisory and consulting data and information as applicable. Has thorough knowledge of terminology and related professional languages used within the department as such pertain to work responsibilities. Has the ability to speak, write and understand the English language.

Mathematical Aptitude: Requires the ability to apply advanced mathematical and accounting concepts, to include integration of related functions; ability to perform and interpret statistical calculations which include revenue modeling, transaction activity and testing.

Functional Reasoning: Requires the ability to apply principles of logical or scientific thinking to implement both intellectual and practical relationships. Involves responsibility for consideration and analysis of complex organizational problems of major functions.

Situational Reasoning: Requires the ability to exercise the judgment, decisiveness and creativity required in critical and/or unexpected situations involving high risk to the organization. Has the ability to plan and develop daily, short- and long-term goals related to organizational goals. Is able to assemble and analyze information and make written reports and records in a concise, clear and effective manner.

ADA COMPLIANCE

Physical Ability: Tasks involve the ability to exert a small amount of physical effort in sedentary to light work involving moving from one area of the office to another; some positions require sufficient hand/eye coordination to perform semi- skilled repetitive movements, such as data entry, filing and/or the use of office equipment or supplies.

Sensory Requirements: Some tasks require visual and auditory perception and discrimination as well as oral communications ability.

Environmental Factors: Tasks are regularly performed without exposure to adverse environmental conditions. Tasks may require extensive computer screen exposure.

The City of Dunedin is an Equal Opportunity Employer. In compliance with the Americans with Disabilities Act, the employer will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.

Finance Director

Date