

City of Dunedin, Florida
Class Description

JOB TITLE: Budget Analyst
Finance Department

GENERAL STATEMENT OF JOB

Professional position, working under supervision of Budget Manager, to ensure accurate and timely budget development, adherence to annual budget and fiscal plans, and the efficient and effective allocation of resources through technical analysis. Assists with the preparation of the annual budget, capital improvements plan, budget adjustments, comprehensive annual financial report (CAFR), and presentations to stakeholders. Assignments are performed with independence and require sound judgement, strong initiative, and adherence to deadlines.

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 of any particular position.

Supports Department Heads, Division Directors and managers in preparing, implementing, and managing their annual budgets, capital improvements projects, and debt management; prepares analytical reports to communicate budget information, year-to-date information, and identify variances.

Reviews, monitors, and interprets budgets, revenues, and expenses to ensure compliance with all applicable legal statutes and recommends necessary actions, when needed. Provides superior customer service to internal and external customers regarding financial inquiries.

Trains various city staff on the budget and accounting modules of the City's financial software, and on budget/accounting procedures.

Extracts data from the financial system, to produce reports for citywide distribution, creating custom macros and utilizing ad hoc report writer.

Performs budget and fiscal analysis and assists in developing recommendations to assist in budgeting, forecasting, and policy decisions. Assists with preparing narratives for Commission meeting agenda items, annual budget, CAFR, capital improvements plan, and other department publications.

Prepares and delivers presentations to internal and external customers, including City Commission.

ADDITIONAL JOB FUNCTIONS

Performs general office work as required, including typing reports and correspondence, data entry, copying and filing, answering public inquiries.

Performs other related duties as required.

MINIMUM TRAINING AND EXPERIENCE

Requires a Bachelor's degree in business, accounting, finance, public administration or related field, with one year of verifiable professional experience in a financial or public sector setting. Internship experience may be considered.

Budget Analyst and/or accounting experience with a public sector entity is preferred.

SPECIAL REQUIREMENTS

Must possess a valid Florida driver's license.

Requires strong proficiency with Microsoft Word, Excel, and database programs and the ability to utilize financial accounting system.

PERFORMANCE INDICATORS

Knowledge of Job: Has thorough knowledge of the methods, procedures and policies of the City of Dunedin as they pertain to the performance of essential duties of the Budget Analyst. Is knowledgeable in the areas of accounting, budget development, and financial analysis. Understands and is able to apply generally accepted accounting principles (GAAP), particularly as applied to governmental entities. Has advanced Microsoft Excel skills including proficiency in macros, pivot tables, and formulas for data manipulation, evaluation, and presentation. Is able to communicate ideas, findings and recommendations in a clear concise manner, both verbally and in writing. Is able to compile, organize and utilize various financial information necessary in the preparation and monitoring of departmental and organizational budgets. Is able to research, collect, organize, and analyze fiscal and non-fiscal data to develop logical conclusion. Has the ability to exercise judgment, discretion, and creativity as situations arise, and to exchange information for the purpose of obtaining information or clarifying details. Is able to effectively communicate and collaborate with elected officials, department directors, division directors, other employee and the general public, to achieve common goals, objectives, and outcomes.

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.

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.

Equipment, Machinery, Tools and Materials Utilization: Requires the ability to use, operate and/or handle equipment such as a computer, recorder, copier, calculator, telephone, microfiche.

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.

Mathematical Aptitude: Requires the ability to apply advanced mathematical and accounting concepts, to include integration of related functions; ability to perform and interpret calculations associated with debt management and investments.

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.

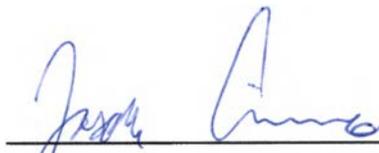
ADA COMPLIANCE

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 VDT 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.



Director of Finance

5/9/2017
Date