

City of Dunedin, Florida
Class Description

JOB TITLE: Budget Manager
Finance Department

GENERAL STATEMENT OF JOB

Under general direction performs responsible professional work which provides the Finance Director with direct staff assistance in carrying out a variety of professional, technical and administrative activities including supervising employees engaged in management and budget analysis. Manages the annual budget process. Performs professional and technical work in budget, strategic planning and research. Reports to the Finance Director.

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.

Manages the activities of the Budget Section subordinate staff. Duties include instructing; assigning, reviewing and planning work of others; maintaining standards; coordinating activities; selecting new employees; acting on employee problems; recommending employee promotions, disciplinary action and discharge.

Consults with department directors and supervisors on budget matters.

Develops and analyzes revenue estimates and fund summaries for budget preparation.

Develops departmental budget packages and a comprehensive City budget for presentation to department directors, City Manager and City Commission for review and approval.

Develops and maintains Budget sections policies and procedures manual.

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Reviews and updates six-year Capital Improvement Program; develops, with department representatives, first year of capital budget.

Monitors budget and ensures expenditures are within budget

Prepares and facilitates budget amendments and transfers as needed. Complies budget amendment packages for Commission review and approval.

Prepares budget transfers as necessary.

Performs general finance/accounting work as required, including but not limited to reviewing bank reconciliations, reviewing invoices and requisitions, preparing journal entries, assisting auditors during annual audit, etc.

Performs general administrative work as required, including preparing Commission meeting agenda items, reviewing management reports, etc.

Compiles data for and prepares various financial, statistical and analytical reports, records and spreadsheets as required.

Receives and responds to inquiries, concerns and requests for assistance in budget matters from City personnel, committees, and other individuals and groups.

May perform duties of the Finance Director in his/her absence.

Calculates internal service fund allocations annually.

Ensures compliance with state and local regulations and City policies.

Ensures budget is adopted in accordance with State mandated Truth in Millage ("TRIM") compliance requirements.

ADDITIONAL JOB FUNCTIONS

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

Performs related duties as required.

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MINIMUM TRAINING AND EXPERIENCE

Requires a Bachelor's degree in business administration or related field with five years of experience in financial management in the public sector; [with two years of prior supervisory experience].

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.

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 Manager. 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, budget development and analysis, etc. Knows how to apply supervisory and managerial concepts and principles; has knowledge of administrative principles involved in developing, directing and supervising various programs and related activities. Is able to make sound, educated decisions. 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. . 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 assemble

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and analyze information and make written reports and records in a concise, clear and effective manner.

Human Interaction: Requires the ability to function in a supervisor capacity for a major organizational unit requiring significant internal and external interaction; requires the ability to apply principles of negotiation, and performs such in formal situations within the context of legal guidelines. . Is able to train, assist, motivate and provide leadership to a diverse group of professionals. Is able to perform employee evaluations and to make recommendations based on results. 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.

Verbal Aptitude: Requires the ability to synthesize data and information, and to use 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 knowledge of proper English usage, grammar, vocabulary and spelling.

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. Has the ability to plan, organize and prioritize daily assignments and work activities.

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. Is able to take the initiative to complete the duties of the position without the need of direct supervision. Is able to read and interpret complex materials pertaining to the responsibilities of the job. Has the ability to plan and develop daily, short- and long-term goals related to organizational purposes.

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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.


Finance Director

10-20-15
Date