

DEPARTMENT: BUDGET
CLASSIFICATION: COMPETITIVE
APPROVED: OCTOBER 28, 2013

FLSA Status: Exempt/Administrative 10/28/2013

BUDGET ANALYST

DISTINGUISHING FEATURES OF THE CLASS: This is a management position responsible for reviewing and analyzing county department budget requests for their operations, functions, and capital programs. The incumbent plays an integral role in the compilation and preparation of the annual county budget including participation in confidential meetings with the Director, County Manager, and department heads. The work involves monitoring expenditures for effective and efficient utilization, evaluating requests for budget transfers throughout the year, preparation of charts and tables, performance of routine office tasks, and providing administrative support to the Administration Committee. Work assignments include budget surveys and analysis, review of proposed work programs, statistical and financial analysis, and assisting in the development of new or improved budget techniques. The incumbent provides general direction to assigned staff. Work is performed under the general direction of the Director Office of Management and Budget with wide latitude permitted for the exercise of independent judgment. May act in the place of the Director to carry out established department policy and procedures. Does related work as required.

TYPICAL WORK ACTIVITIES:

1. Analyzes departmental appropriation requests, grant budget requests, revenue estimates, plans and work programs as part of the annual budget process;
2. Performs technical review of annual budget submissions to ensure compliance with established guidelines and format, to verify the accuracy of calculations, to compute sub-totals and totals by budget classification and department, and to edit figures as necessary to finalize the annual budget;
3. Performs research and studies, statistical and financial analysis, and prepares reports and recommendations, such as revenue trends and projections, staffing size analysis and function appropriation analysis;
4. Recommends the development and revision of procedures, budget forms, and instructions for improving budget preparation;
5. Computes and charts statistical and financial data related to monthly budget status, projects, and special budget analysis assignments;
6. Analyzes, monitors, and processes departmental requests for transfer of funds and appropriation changes, including position funds, while ensuring that budgets remain within county guidelines;
7. Attends budget meetings with Director, County Manager, and departments heads and adjusts budgets based upon the direction of the County Manager;
8. Prepares and proofs budget materials prior to the submission of the tentative and adopted budgets and posting to the county web site;
9. Serves as recording secretary to the Administration Committee which involves receiving materials, preparing agendas, attending meetings, and taking, finalizing, and filing minutes;
10. Identifies problem areas for special study consideration, develops methods and procedures to research, identifies possible solutions and makes recommendations to find successful solutions to problems;
11. Performs routine office tasks such as answering phones, filing, making copies, utilizing modern computer software applications (including word processing, spreadsheets, database, and calendar programs) and related peripherals;
12. Prepares legislative resolutions;
13. Compiles statistics and records to prepare reports, charts, and graphs for annual budget and on-going analysis;
14. Provides assistance in implementing budgeting software systems, maintenance of the position control system, and the chart of accounts;
15. When assigned may act as Director to ensure that established departmental policies and instructions are carried out.

CONTINUED

BUDGET ANALYST CONTINUED

FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES AND PERSONAL CHARACTERISTICS:

Thorough knowledge of the principles of public administration and administrative management; thorough knowledge of the principles, practices, and terminology of general and governmental accounting and budgeting; thorough knowledge of financial administration including budgeting and reporting; good knowledge of county organization, operation, and budgetary procedures and practices including those required for the preparation and approval of budget allocations and changes; good knowledge of county department programs, operations, goals, objectives and general background; good knowledge of business arithmetic and English and statistical concepts and methods; skill in using modern software applications including word processing, spreadsheets, databases, at an acceptable rate of speed and accuracy; ability to analyze department operations and organizational structure and to make recommendations; ability to analyze problems and suggest solutions; ability to compile and prepare statistical and other data for presentation to others; ability to analyze budget data, make calculations, and prepare budgets; ability to compute percentages, cumulative totals, averages and summary statistics for carrying out detailed budget preparation and operation; ability to carry out complex verbal and written instructions; ability to be discreet in routinely handling highly confidential information; ability to perform close, detail work involving considerable visual effort and strain; poise in communicating with public officials; tact in relating to personnel; resourcefulness in reconciling data and working out computational and procedural problems; initiative in carrying work through to completion; neat personal appearance; sound professional judgment; integrity and honesty; physical condition commensurate with the demands of the position.

SUGGESTED PROMOTIONAL QUALIFICATIONS:

Three (3) years of permanent competitive status as a Budget Clerk in the Office of Management and Budget immediately preceding the date of written examination.

MINIMUM QUALIFICATIONS: Graduation from high school or possession of an equivalency diploma **AND**

1. Graduation from a regionally accredited college or university or one accredited by the New York State Board of Regents to grant degrees with a Bachelor's Degree in accounting, business or public administration, economics, or closely related field **and** two (2) years of full-time paid accounting or auditing experience involving the maintenance or auditing of double-entry books of a business, including the general ledger, or in the maintenance of governmental agency books involving appropriation accounting and the preparation of budget and financial reports; **OR**
2. Graduation from a regionally accredited college or university or one accredited by the New York State Board of Regents to grant degrees with an Associate's Degree in accounting, business or public administration, economics, or closely related field **and** four (4) years of full-time paid accounting or auditing experience involving the maintenance or auditing of double-entry books of a business, including the general ledger, or in the maintenance of governmental agency books involving appropriation accounting and the preparation of budget and financial reports.