

PERSONNEL COMMITTEE

13-0102R

RESOLUTION APPROVING PROPOSED AMENDMENTS TO THE SPECIFICATIONS FOR THE EXISTING CIVIL SERVICE CLASSIFICATION OF MANAGER, FISCAL & MANAGEMENT ANALYSIS INCLUDING A TITLE CHANGE TO BUDGET MANAGER, AND SPECIFYING CONTRACT BENEFITS FOR SAME.

CITY PROPOSAL:

RESOLVED, that the proposed amendments to the specifications for the existing civil service classification of manager, fiscal & management analysis, including a title change to budget manager, which were approved by the civil service board on February 12, 2013, and which are filed with the city clerk as Public Document No. _____, are approved. This classification shall be subject to the city's collective bargaining agreement with its supervisory unit employees; and that pay range for said classification shall be Range 1105-1115, \$5,417 to \$6,897 per month. The proper city officials are authorized to execute and implement an agreement with the union to provide for employing one or more unit members consistent with this resolution.

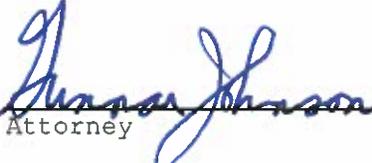
Approved:


Department Director

Approved for presentation to council:


Chief Administrative Officer

Approved as to form:


Attorney

Approved:


Auditor

HR CT:ao 2/14/2013

STATEMENT OF PURPOSE: This existing classification description was outdated and it has been analyzed and revised to more accurately reflect the current

responsibilities of the classification, to meet our current format for job descriptions, and to reflect a title more descriptive of the classification. There is no change in the rate of pay, which is Range 1105-1115, \$5,417 to \$6,897 per month.

Budget Manager

SUMMARY/PURPOSE:

The objective of the Budget Manager is to analyze, recommend, and report on budgetary and financial activities in conformity with generally accepted budget principals, legal requirements as proscribed by state statute and City policies and procedures. The position provides advice and technical assistance with cost analysis, fiscal allocation, financial forecasting and budget preparation. The position evaluates program effectiveness in operations and procedures to recommend improvements. The position coordinates the annual citywide budget process, creates and implements budget procedures and policy, and presents the annual budget to City Council and all interested parties in a variety of formats.

ESSENTIAL DUTIES AND RESPONSIBILITIES (Other duties may be assigned):

1. Coordinate the annual budget process by providing data, information, and expertise to Administration and to departments for use in decision making and budget formulation.
2. Summarize budgets and submit recommendations for the approval or disapproval of funds requests.
3. Examine budget estimates for completeness, accuracy, and conformance with procedures and regulations.
4. Prepare final budget for adoption by the City Council.
5. Identify and analyze new or revised methods, policies, or programs that will increase productivity, lower costs or increase revenues.
6. Perform cost-benefits analyses to compare operating programs, review financial requests, and explore alternative financing methods.
7. Coordinate and conduct research to gather and analyze data developed internally or derived from external sources.
8. Provide assistance to City Departments in making management improvements and in evaluating program effectiveness.
9. Maintain and operate the City's budget system. Using the system, create or prepare budget reports to present data as necessary.
10. Ensure that budget adjustments are made in accordance with legal and programmatic requirements.
11. Review operating expense and revenue budgets to analyze trends affecting budget needs.
12. Match appropriations for specific programs with appropriations for broader programs, including items for emergency funds.
13. Calculate the financial impact of multiple fiscal scenarios.
14. Prioritize, assign, and direct the work of assigned staff, including establishing work standards, effectively recommend employment action, hire, discharge, etc., provide performance evaluations, delegate authority and responsibility, train and communicate instructions and information.

Job Requirements

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skills and abilities required.

Education & Experience Requirements

1. Bachelor's degree in Finance, Business Administration, Accounting, or a field determined by HR to be equivalent.
2. Four years of full-time experience in budgeting, auditing or finance.
3. Experience in governmental budgeting preferred.

Knowledge Requirements

1. Thorough knowledge of budgeting principles, methods, practices and terminology.
2. Thorough knowledge of fiscal and management analysis methods.
3. Knowledge of governmental accounting.

Skill Requirements

1. Skill in analyzing financial data to provide information and knowledge in support of good decision making.
2. Skill in analyzing operations and procedures.
3. Skill in accurately presenting large quantities of financial data and information in a meaningful and understandable format.

Ability Requirements

1. Ability to establish and maintain good working relationships with both internal customers such as administrators, management and employees as well as external customers such as outside agencies and organizations.
2. Ability to supervise assigned personnel and effectively motivate their performance.
3. Ability to investigate and resolve disciplinary and grievance issues.
4. Ability to efficiently use computer applications such as Word, Excel, Power Point and dedicated financial and budget systems.
5. Ability to systematically perform detailed work often under stringent deadlines.
6. Ability to assess and encourage appropriate development opportunities for assigned staff.

Physical Ability Requirements

1. Ability to work for long periods while seated at a desk.
2. Ability to talk and hear to exchange information.
3. Ability to occasionally stoop, kneel, crouch, and reach to file information.
4. Ability to occasionally lift and carry items such as reports and paperwork weighing up to 25 pounds.

Genlst: CT	Job #:	Union: CDSA	Pay: 1105 – 1115	CSB: 20130212
CC:	Res:	EEOC:	EEOF:	WC:

MANAGER, FISCAL AND MANAGEMENT ANALYSIS

DUTIES

1. To define, direct, research, recommend, implement and evaluate existing and proposed policies and procedures.
2. To provide assistance to other City Departments in making management improvements and in evaluating program effectiveness.
3. To analyze City financial and budgetary systems.
4. To supervise and manage division staff.

ACCOUNTABILITIES

1. Defining, directing, researching, recommending, implementing as evaluating existing and proposed policies and procedures.
 - A. Identifying and analyzing current operations, procedures, problems or needs.
 - B. Defining project or management improvement areas and designing valid research methodologies for collecting performance, efficiency, effectiveness and cost data.
 - C. Coordinating and conducting in depth research to gather and analyze pertinent data developed internally or submitted from external sources.
 - D. Formulating and recommending new or revised methods, policies, and implementation plans that will increase productivity, improve performance, lower costs or increase revenues.
 - E. Evaluating the effectiveness of net or revised methods that are instituted.
2. Providing assistance to other City departments in making management improvements and in evaluating program effectiveness.
 - A. Assisting department personnel in determining the scope of a particular project as well as setting goals and timetables with or without direct administrative intervention.
 - B. Researching and analyzing pertinent data.
 - C. Providing department personnel relevant information to assist them in sound decision making.
 - D. Assisting department personnel in presenting recommendations in a professional manner.
3. Analyzing City fiscal and budgetary systems.
 - A. Assisting in the development of new financial system applications on the mainframe computer.
 - B. Assisting in the formulation and promotion of the financial trend monitoring system and the financial forecasting system.
 - C. Assisting in the annual budgetary process by providing data and expertise to the Administration and to departments for use in decision making and budget formulation.

4. Supervising and managing division staff.
 - A. Effectively recommending the hiring, transfers, suspension or discharge of subordinate personnel.
 - B. Training supervising, evaluating, rewarding and disciplining Division personnel.
 - C. Defining needs, requirements, timetables, and priorities of assigned work projects.
 - D. Assigning and directing the work of subordinate employees.
 - E. Delegating authority and responsibility to appropriate staff to carry out job assignments.
 - F. Providing direction and assistance with operational problem solving.
 - G. Adjusting employee grievances on behalf of the employer.
 - H. Providing for office and reporting procedures and other administrative functions.
 - I. Assisting in the formulation of Division and Department policies and administrative procedures.
 - J. Reporting Division activities to the Director of Finance & Records and other City officials as necessary.
 - K. Representing the Division at City Council and other meetings, and to other public officials.
 - L. Keeping abreast of federal, state, and local legislation and regulations affecting Division operations.

MINIMUM QUALIFICATIONS

1. Education and Experience
 - A. An acceptable combination of verifiable education and experience equaling six (6) years, which demonstrates possession of the knowledge and ability requirements listed below. Such education might include a degree in Accounting or Business Administration. Areas of acceptable experience might include budget or management analysis or systems development.
2. Knowledge and Skills
 - A. Extensive knowledge of budgetary and accounting principles and practices.
 - B. Knowledge of statistical principles and analytical techniques.
 - C. Knowledge of program analysis, planning, implementation, and evaluation principles and techniques.
 - D. Knowledge of local government financial systems.
 - E. Knowledge of automated accounting systems.
 - F. Knowledge of approved personnel, supervisory, and management practices.

3. Abilities

- A. Ability to evaluate and analyze operations and procedures.
- B. Ability to design valid research methodology.
- C. Ability to interpret and present large quantities of technical data in a meaningful and understandable format.
- D. Ability to communicate clearly and concisely in oral and written form.
- E. Ability to speak before audiences.
- F. Ability to organize, schedule, and supervise Division workload.
- G. Ability to establish and maintain good working relationships with City administrators and employees at all levels in all departments.
- H. Ability to pay attention to detail.
- I. Ability to work under pressure.
- J. Ability to perform **SEDENTARY WORK** *

* **SEDENTARY WORK** is defined as lifting 10 pounds maximum and occasionally lifting and/or carrying such articles as docketts and ledgers.

CJ:bf
05/07/85

Anlst: CJ	Date: 19850507
Union: Supv	Pay: 1085
CSB: 19850521	Class: 1315
CC: 19850603	Res: 85-0386R