

**CITY OF GILROY
FINANCE DEPARTMENT
BUDGET ANALYST**

GENERAL DUTIES: Under general supervision of the Finance Director, perform a variety of professional-level budget and financial analysis, assess departmental operations to improve efficiency, assist in the preparation of the City's Financial Plan and Capital Improvement Budget, and conduct research and evaluation of management projects and policy issues. This position will also support the financial transactions of the Engineering, BLES, and Planning Divisions, provide analytical support for development impact fees and other fees, prepare grant requests, analyze fees and reimbursements, and administer funded grants. Given the nature of the assigned work, the Budget Analyst may receive project/work assignment direction from the City Engineer or Development Center Manager. Additional work assignments assisting other departments and/or divisions are also anticipated. The Budget Analyst is a confidential, unrepresented, exempt-level position that provides analytical data, information, and reports in support of the City's labor negotiations function.

GENERAL REQUIREMENTS:

Personal Appearance - Is appropriate for the work environment and meets expectations for the proper image of the City, as per department policy.

Attendance - Follows department/City policy in regards to punctuality and attendance.

Compliance with Work Instructions - Follows all work instructions given, and completes all assigned duties. Follows the policies, rules, and regulations of the City and department.

Safety - Follows the Safety and Health Handbook, as well as other safety related standards, and avoids unnecessary risk to oneself, co-workers, citizens, and property.

Internal Relations - Conducts work in a manner which supports the overall team effort, and which avoids disruption of one's work and the work of others. Treats all City employees with respect. Takes responsibility to resolve differences. Finds solutions to problems. Respects racial, religious, ethnic and sexual differences of others, and avoids derogatory statements regarding these differences.

Customer Service - Conducts work that fosters public support for the City, that will lead to fewer complaints and claims against the City. Treats customers with respect. Follows the same rules that one expects the customers to follow. Respects racial, religious, ethnic and sexual differences of others, and avoids derogatory statements regarding these differences.

ILLUSTRATIVE EXAMPLES OF WORK:

1. Compile and analyze financial data and transactions as well as budget requests and other relevant materials from operating departments for the preparation of the City's annual Financial Plan and Capital Improvement Budget.
2. Develop and implement improved methods of departmental budget preparation, including budget preparation manuals or guides, budget kick off presentations, technical assistance to departments in preparing budget requests, as well as budgetary control procedures. Develop budgetary, operational, and policy recommendations.
3. Perform grant writing and preparation of reimbursement requests from local, State and Federal aid programs.
4. Assist in the preparation and follow-up of applications for financial aid from local, State and Federal agencies.
5. Maintain database of City's compliance with grant reporting requirements, including periodic financial reports and timely reimbursement requests/receipts.
6. Provide cost accounting support in establishment of fees and overhead charges for City services.
7. Assist in the preparation of the salary and benefits portion of the operating budget for all departments.
8. As requested, provide data, costing information, and reports in support of the City's labor negotiations function.
9. Review departmental expenditure requests and revenue estimates for completeness and accuracy.
10. Assist in developing short- and long-term revenue and expenditure projections.
11. Coordinate and edit the preparation of program budget narratives. Assist in the preparation of cost information and budget related documents.
12. Review proposed budgets and make recommendations on resource allocations.
13. Assist in monitoring and controlling budget activities including, but not limited to, developing and recommending impact fee schedule; tracking incentive agreements and developer fees; preparing, reviewing, and analyzing impact fee budgets and accounting methodologies; and analyzing developer reimbursements.

14. Analyze and reconcile subsidiary, budgetary and general ledger accounts.
15. Work with department heads to identify and solve budget issues. Assist department and division heads in developing, presenting, and amending their budgets.
16. Conduct various complex statistical analysis of budgetary information and prepare related summary reports as required.
17. Prepare summary reports, spreadsheets, and charts for presentation to the City Administrator, Finance Director, City Council, department heads, and the public.
18. Interact and communicate with a variety of groups and individuals, including Finance Department staff, department heads, division managers, City Council members, the public and professional peers.
19. Provide technical assistance to city departmental staff in developing and formulating budget and other related proposals and reports.
20. Provide and conduct research and analyses, and make recommendations regarding policy formulations, operational planning and program evaluation.
21. Provide assistance, research and counsel to the City Administrator and department heads on departmental policies and issues, as well as administrative and operational issues of the City.
22. Perform other related duties as required.

REQUIRED SKILLS, KNOWLEDGE AND ABILITIES:

SKILLS:

1. Communicate effectively, both verbally and in writing.
2. Maintain accurate and detailed records and make accurate arithmetic calculations.
3. Work on several assignments simultaneously, set priorities, meet deadlines, and work independently within established guidelines.

KNOWLEDGE: Knowledge of:

1. Fiscal and budgetary practices and public finance.
2. Grant administration, accounting, auditing, economics, financial forecasting, and budgeting principles and practices.

3. Public works related capital improvement budgeting.
4. Funding sources; principles of administration, organization and management.
5. Governmental accounting principles, applicable laws and regulations, and financial reporting practices.
6. Statistical and analytical methods, techniques and procedures.
7. Project management.
8. Basic management information system applications for accounting and budgeting functions.
9. Computer applications, including spreadsheet, database, word processing and presentation software.
10. General customer service principles and practices.

ABILITIES: Ability to:

1. Analyze budgets and other financial data.
2. Manage multiple priorities.
3. Analyze complex problems, evaluate alternatives and implement creative recommendations.
4. Establish and maintain effective working relationships with supervisor, co-workers, other departments, outside agencies, and the general public.
5. Use independent judgment, within established guidelines, in the course of undertaking assigned responsibilities.
6. Organize work, set priorities, meet deadlines, and complete assignments with minimal supervision.
7. Communicate effectively, both verbally and in writing.
8. Work effectively as a team member in developing and preparing quality finished products.
9. Identify data sources, collect and analyze information and prepare informative reports.
10. Provide technical and substantive direction to other staff members on budget operating matters.

MACHINES/TOOLS/EQUIPMENT UTILIZED:

Typical office and field environments include the following:

1. Computer, keyboard and monitor
2. LaserJet or ink jet printer
3. Telephone or headset
4. Copier
5. Calculator
6. 10-key adding machine
7. Facsimile machine
8. Optical character reader
9. Postage meter and scale
10. Lettering machine
11. Microfiche reader
12. Binding machine
13. Polaroid or digital camera
14. Paper shredder
15. Paper cutter
16. Plans, maps and blueprints
17. Presentation equipment, microphones, easels, overhead projectors, etc.
18. Plan-copying machine
19. Specialized computer software
20. Automobile

PHYSICAL DEMANDS:

Under typical office or field conditions, employee will perform the following physical activities which include handling files, books, binders, plans, and boxes of work-related material:

1. Sitting, for prolonged periods of time while working at a computer or attending meetings.
2. Walking
3. Standing, during Council meetings or other public presentations.
4. Kneeling
5. Bending/stooping
6. Twisting
7. Reaching
8. Carrying
9. Pushing/pulling, boxes of files or plans
10. Lifting up to 25 lbs.
11. Driving
12. Speed, in meeting deadlines and in using office equipment

SENSORY DEMANDS:

Under typical office and field conditions, employee utilizes these senses while using a computer, typewriter, telephone, fax machine, copier, adding machine, postage meter, paper shredder, paper cutter, plan, map, blueprint, camera, microphone, overhead projector, easel, or automobile:

1. Seeing
2. Speaking/Hearing
3. Touching
4. Smelling

ENVIRONMENTAL AND FLOOR SURFACE CONDITIONS:**Office Conditions:**

1. Indoors: Typical office conditions, over 90% of the time.
2. Flooring: Low level carpeting, linoleum, tile, wood, and some exposure to asphalt.
3. Noise Level: Conducive to office settings with phones, copiers, faxes, or printers.
4. Lighting: Conducive to normal office setting.
5. Ventilation: Provided by central heating and air conditioning.
6. Dust or Fumes: Normal, indoor levels associated with dust and odors from paper, blueprints, ink pens, plan copier, copy machines, or other office-related equipment.

Field Conditions:

1. Outdoors: Typical field conditions, less than 2% of the time.
2. Travel: Under varying conditions via automobile or plane, less than 8% of the time.
3. Flooring: Asphalt, grass, dirt, wood, carpeting, linoleum, tile, and uneven surfaces.
4. Noise Level: Minimal to low exposure to equipment noise when traveling in the field.
5. Lighting: Normal outdoor conditions, with some exposure to extreme weather conditions.
6. Ventilation: Heating and air conditioning provided by vehicle or plane.
7. Dust or Fumes: Normal to high outdoor levels of dust, pollen, or vehicle exhaust when conducting surveys or research or when traveling.

HAZARDS:

Mechanical or electrical exposure is minimal while properly using standard office equipment such as a telephone, computer, printer, copier, adding machine, fax machine, radio, paper shredder, paper cutter, microphone, overhead projector, etc.

When traveling in the field, there is some exposure to mechanical hazards while utilizing a vehicle.

ATMOSPHERIC CONDITIONS:

Minimal exposure to fumes occurs in the field, as well as in a typical office environment. Office exposure to fumes or gases may occur due to the use of copiers, dry erase pens, liquid paper, toner cartridges, ink pens, or other office supplies or equipment.

REQUIRED TRAINING, EXPERIENCE AND QUALIFICATIONS:

1. Bachelor's Degree from an accredited college or university with major course work in Accounting, Finance, Economics, Public Administration, or a closely related field.
2. Three (3) years of responsible, professional work experience in the areas of Operational Budgeting, Capital Budgeting, Accounting, Grant Administration and/or Finance is required. One (1) year of local government accounting or finance experience that has included budget responsibilities, grant administration and development fee and impact fund accounting and analysis is strongly preferred.
3. Experience in utilization of current personal computer Excel spreadsheet and Microsoft word-processing applications. Proficiency with the use of complex financial system software is required. Direct experience with SunGard Pentamation desired, but not required.
4. Possess and maintain a valid California Driver License and a safe driving record necessary to operate assigned vehicle(s).
5. Willingness to continue education and training by learning new skills as changes occur. Expand skills by taking additional courses and attending seminars, workshops and individual study.
6. Pass a post-offer medical examination, which includes a drug test.
7. Prefer non-tobacco user.
8. Prefer bilingual (English/Spanish).
9. Pass a Department of Justice criminal record check for employment.