



Town of Oro Valley Classification Description

Title: **SENIOR BUDGET ANALYST**
Job Code: 1435
FLSA Status: Exempt

Department: Finance
Salary Grade: 118

POSITION SUMMARY:

Under general supervision, coordinates the development and preparation of the Town's annual budget, performs financial analysis, fiscal/managerial research, financial forecasting and interpretation of records and reports for the Finance Department.

ESSENTIAL JOB FUNCTIONS:

- A. Performs comparative and fiscal analyses, interprets fiscal records and prepares reports through application of statistical analysis, research techniques, financial forecasting and estimating methodologies.
- B. Compiles, reviews and evaluates departmental budget requests and revenue and expenditure forecasting.
- C. Responsible for the development of the Town's annual budget and prepares and provides budget documents and reports on the Town's financial status.
- D. Responsible for preparation of the Town's annual five-year financial forecast.
- E. Assists departments on developing operating and capital budgets by conducting research, analyzing data, preparing reports and making recommendations.
- F. Coordinates and prepares the Town's 10-year Capital Improvement Plan.
- G. Prepares quarterly Capital Improvement Plan status reports.
- H. Estimates the operating budget's year-end personnel expenditures and develops worksheets for fund revenue and expenditure estimates to calculate fund balances and in preparation for developing the new fiscal year budget.
- I. Performs administrative functions on behalf of the Town's self-insured medical and prescription plan and complies with the Town's HIPAA Privacy Policies and Procedures, especially as it pertains to use and disclosure of Protected Health Information.
- J. Monitors and analyzes accounts, budget variances, financial/cost impacts, financial reporting and managerial research projects.
- K. Develops labor cost projection worksheets to reflect department/division staffing levels.
- L. Ensures departmental budget documents are complete and meet deadlines.
- M. Responds to budget inquiries and resolves budgetary issues.
- N. Coordinates final publication and distribution of adopted budget.

- O. Performs research analysis and makes recommendations for improving management policies, procedures, methods and operations to improve effectiveness and efficiency of delivery of service.
- P. Assists in the development of special projects such as cash management, investment policies and alternatives, local sales tax monitoring and compliance and long-term debt administration.
- Q. Participates in the implementation of new financial systems.
- R. Responsible for tracking and maintaining budgeted personnel positions.
- S. Trains Town employees on the budget module of MUNIS.
- T. Prepares and updates the Town's annual Master Fee Schedule.
- U. Prepares the Town's annual Impact Fee Report.
- V. Assists in the preparation of the Town's Popular Annual Financial Report
- W. Performs other duties as required.
- X. Regular and reliable attendance; may work more than forty hours in a workweek without additional compensation to perform assigned job duties, including weekends, evenings, early morning hours, and holidays as required.

REQUIRED KNOWLEDGE, SKILLS AND ABILITIES:

- Knowledge of applicable Town, state and Federal statutes, ordinances, codes, rules and regulations governing public finance and budgeting.
- Knowledge of bookkeeping and/or reporting preparation and principles.
- Knowledge of budget development and analysis principles and practices.
- Experience with Microsoft Office, including strong Excel skills.
- Strong comfort level and experience using financial, budgeting and forecasting software systems.
- Skill in preparing status reports, statements and documents.
- Skill in monitoring, tracking, analyzing and evaluating expenditures and financial transactions.
- Skill in performing mathematical and statistical calculations and financial projections.
- Ability to establish and maintain effective working relationships.
- Ability to work independently and self-teach as needed when training and supervision may be limited.
- Ability to ensure accuracy of all work performed.

MINIMUM QUALIFICATIONS:

- A Bachelor's degree in Finance, Accounting, Business Administration or related field.
- Five (5) years' experience in finance, budget, accounting, analytical writing, public policy and management analysis or research; **OR** an equivalent combination of education and experience.

PREFERRED QUALIFICATIONS:

- Governmental budgeting or accounting experience.
- Experience with Tyler Technologies MUNIS ERP software.

ENVIRONMENTAL FACTORS and WORKING CONDITIONS:

- Work is performed in an indoor environment.