

BUDGET ANALYST I  
BUDGET ANALYST II

DEFINITION

To perform complex financial analysis related to coordinating, preparing and monitoring the City's financial plan including operating and capital budgets; to provide technical assistance and recommendations to City departments as it relates to budget development and monitoring; and to research, analyze and review complex financial data.

DISTINGUISHING CHARACTERISTICS

Budget Analyst I – This is the entry level class in the Budget Analyst series. This class is distinguished from the journey level by the performance of the more routine tasks and duties assigned to positions within this series. Employees at this level are not expected to perform with the same independence of direction and judgment on matters allocated to the journey level. Since this class is typically used as a training class, employees may have only limited or no directly related work experience. Employees work under general supervision while learning job tasks.

Budget Analyst II – This is the journey level class within the Budget Analyst series and is distinguished from the I level by the assignment of the full range of duties. Employees at this level receive only occasional instruction or assistance as new, unusual or unique situations arise and are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the I level.

SUPERVISION RECEIVED AND EXERCISED

Budget Analyst I

Receives general supervision from the Budget Manager.

Budget Analyst II

Receives direction from the Budget Manager.

EXAMPLES OF ESSENTIAL DUTIES - Duties may include, but are not limited to, the following:

Perform professional technical and analytical work in the areas of City-wide budget development, monitoring and implementation.

Prepare financial reports; analyze and recommend budget funding levels and determine the impact of programs.

## Budget Analyst I/II

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Assist in coordinating the City budget process, including the preparation of budget instructions and budget documents.

Develop and implement training for City staff related to annual budgeting, budget adjustments and use of the City's financial system.

Forecast, analyze and monitor City revenues and expenditures throughout the year, ensuring compliance with adopted fiscal initiatives, financial policies, guidelines and procedures.

Collect complex statistical, financial and operational data to prepare City-wide budget summaries.

Analyze and recommend budget funding levels to determine the impact on programs and cost proposals.

Review and post budget adjustments and make recommendations regarding fund allocations and justification.

Coordinate with Finance Department staff and other City departments to ensure cost accounting and revenue collection systems are consistent with the approved budget; review accounting systems and procedures related to area of program assignment and make recommendations for improvements and modifications.

Forecast and budget major revenues including sales tax, property tax, and large development impact fees.

Receive, research and respond to questions from City management, City Council, outside agencies, member of the public and news media regarding the City's budget activities.

Assist in monitoring the City's budget for overages; propose recommendations and provide guidance to City staff.

Serve as subject matter expert and perform complex financial analysis as requested by City Council, executive management, department management and outside agencies.

Make recommendations for changes and improvements to existing standards and procedures.

Maintain knowledge of current developments, legislation, rules, regulations and innovations in governmental financial management, including budget management and financial accounting systems.

Build and maintain positive working relationships with co-workers, other City employees and the public using principles of good customer services.

Assist in conducting quarterly budget to actual reviews.

Assist in the administration of City's budget development financial application.

Perform related duties as assigned.

MINIMUM QUALIFICATIONS

Budget Analyst I

Knowledge of:

Principles and practices of governmental accounting, auditing and financial reporting including GASB and GAAP.

Modern office equipment and methods including use of computer applications in word processing, spreadsheet, database, and graphic presentation.

Automated accounting and information systems.

Complex statistical research and analysis techniques.

Ability to:

Perform professional duties in the analysis of a variety of complex accounting and financial data.

On a continuous basis, know and understand all aspects of the job; intermittently analyze work papers, reports and special projects; identify and interpret technical and numerical information; observe and problem solve operational and technical policy and procedures.

On a continuous basis, sit at desk for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone, and write or use a keyboard to communicate through written means; and lift or carry weight of 10 pounds or less.

Learn pertinent local, State, and Federal laws, rules and regulations especially as related to accounting, auditing, and budgeting requirements.

Apply accounting principles to the analysis of budgetary and accounting records; prepare financial statements and reports.

Collect, evaluate and interpret varied statistical and narrative information.

Maintain confidentiality as necessary.

Use automated accounting and information systems.

Use a variety of personal computer applications in word processing, spreadsheet, database, and graphic presentation.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of work.

### Experience and Training

#### Experience:

Three years of professional financial, accounting, or budget experience.

AND

#### Training:

A Bachelor's degree from an accredited college or university, preferably in accounting, finance or a related field.

### License or Certificate

Possession of a valid California driver's license by date of appointment.

## Budget Analyst II

In addition to the qualifications for the Budget Analyst I:

#### Knowledge of:

Principles and practices of budget development, financial accounting, analysis and reporting, cost-benefit analysis, policy analysis and long-range financial planning.

Pertinent local, State and Federal laws, rules and regulations, as related to area of assignment.

Advanced methods of financial record keeping, data collection, research and report preparation and presentation.

#### Ability to:

Independently conduct complex research and financial analysis related to the development and monitoring of the City-wide budget.

Develop technical reports and presentations.

Monitor assigned accounting and financial analysis activities ensuring compliance with local, State, and Federal requirements and professional standards.

Train staff in budgetary principles, practices and procedures.

Experience and Training

Experience:

Two years of professional experience performing duties similar to that of a Budget Analyst I with the City of Roseville or in an organization-wide budget analyst capacity performing complex financial analysis related to coordinating, preparing and monitoring a financial plan including operating and capital budgets; providing technical assistance and recommendations to departments as it relates to budget development and monitoring; and to research, analyze and review complex financial data.

AND

Training:

A Bachelor's degree from an accredited college or university, preferably in accounting, finance or a related field.

License or Certificate

Possession of a valid California driver's license by date of appointment.

10-12-21

11-07-20

10-22-18

08-10-17

08-25-12

02-20-09

01-14-99

05-20-91

10-01-88

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07-01-82

Administrative Analyst