 CITY OF HELENA

## Position Title: Budget Analyst

## Department:  Division:

## FLSA:

**Pay Grade: 144**

**X** Regular Full-time \_\_\_Regular Part-time \_\_\_Temporary/Seasonal \_\_\_On-Call

**Hours worked per week: 40**

**Daily Shift: \_8:00 a.m. – 5:00 p.m.**

**Work Schedule:** \_\_\_ Sun **X** M  **X** \_T **X** \_W **X** \_Th **X** \_Fr \_\_\_Sat

*The City of Helena is an equal opportunity employer. The City shall, upon request, provide reasonable accommodations to otherwise qualified individuals with disabilities.*

Job Purpose:

Under the direction of the Finance Director, this position is responsible for assisting with the preparation and presentation of the city’s operating and capital budgets. The budget preparation involves many detailed and complex processes completed in coordination with other departments and stakeholders.

This position also provides complex fiscal analysis and support and prepares financial data and reports for the Finance Director, City Manager, departments and the City Commission.

**Essential Duties:** *These job functions are the essential duties of the position and are not all-inclusive of all the duties the incumbent may be assigned.*

**60% Budget Development:**

* Gather, analyze, and verify revenue, expense, and capital outlay data from financial system
* Gather and analyze statistical metrics and update internal cost allocation workpapers. Verify information and assist with annual forecast and adjustments
* Assist with the estimation of department and general revenue forecasts
* Assist with the preparation of administrative budgets not prepared by other departments.
* Update, verify and distribute budget documents to departments for operating forecasts
* Ensure department submissions are complete and reasonable with established procedures and regulations
* Review preliminary and final budget submissions to ensure cash flows, transfers and inter-departments charges are balanced and tie to financial records
* Assist with coordinating and updating all budget and rate resolutions and coordinate appropriate public hearing notices
* Assist with the preparation and final printing and distribution of the final budget document
* Ensure all budget entries are entered accurately into financial system and are balanced to adopted budget
* Assists with project code accounting and review as it relates to the annual budget process
* Administers the annual budget carry-over process

**40% Budget Analysis & Reporting**

* This position provides detailed analysis on budget vs. actual variances on a monthly, quarterly, and annual basis and prepares appropriate reports for Finance Director for review.
* Updates and distributes budget vs. actual financial reports to departments and follows up to ensure variances are being addressed and follows up with department if budget amendments are warranted
* Reviews and /or prepares budget adjustments requested by departments
* Reviews and reconciles project accounting to adopted budget as needed
* Provide assistance, training, and guidance to staff throughout the various City departments and divisions with the review and recommendation of budget submissions
* Assists with rate increase analysis in compliance with appropriate laws, rules, codes, regulations, policies, and procedures.
* Assists with economic analysis and fiscal indicator / metric reporting
* Provide budget information, analysis, workpapers, statistics and other information to assist in the preparation of the Audited Annual Financial Report preparation.
* Works as a team with other accounting and finance staff to ensure duties are completed accurately and timely
* Participate in special projects as assigned which may include revenue analysis, forecasting, and feasibility analysis
* Update annual assessment databases and workpapers and prepare data files for tax system
* Perform other duties as assigned

Essential Knowledge, Skills and Abilities Related to this Position:

Knowledge of:

* The principles, methods and practices of municipal accounting and budgeting, mathematics, and statistics
* Modern office practices and procedures of standard office equipment and computer equipment
* Intermediate or Advanced use of Microsoft Office products, including Excel, Word, and PowerPoint
* Modern economic principles

Skill or ability to:

* Prepare the budget in accordance with generally accepted accounting principles and State law
* Maintain a high degree of discretion and integrity when handling confidential data
* Communicate effectively both orally and in writing and explain complex processes in plain terms
* Analyze operating trends from records and other materials
* Work proficiently with Microsoft Excel including working with established complex spreadsheet files, ability to write advanced formulas, create pivot tables, use sort features, create graphs and tables, manipulate data and ability to process large quantities of data into relevant business information.
* Use Microsoft PowerPoint to work with existing files or create new files to make effective presentations to staff and the City Commission
* Establish and maintain effective, professional working relationships with employees and the public.
* Demonstrate critical thinking skills and provide recommended solutions to identified challenges.
* Ability to multi-task, prioritize workflow to achieve deadlines with quality work product.

Physical Demands:

The position requires the ability to perform sedentary physical work with the ability to lift and carry up to 10 points regularly and on occasion up to 50 pounds. The position must have the ability to perform body movements applicable to records management and office environment.

Safety

Performs all functions in the safest possible manner and according to policies and procedures. Participates fully with safety trainings. Reports unsafe work conditions and practices, work-related injuries, illnesses, and near-misses as soon as possible to assigned supervisor.

**Minimum Qualifications (Education, Experience and Training):**

This position requires a Bachelor’s Degree in Business, Finance, Accounting or related field from an accredited college or university. The position requires a minimum of two years progressively responsible experience with a preferred emphasis on governmental finance and budgeting. Other relevant combinations of education and work experience may be evaluated on an individual basis.

License or Certificate:

Must possess a valid driver’s license with acceptable driving record at the time of hire and have the ability to obtain a valid MT driver’s license within six months of hire.

Supervision Received:

This position is under the general direction of the Finance Director.

Supervision Exercised:

None

The specific statements shown in each section of this position description are not intended to be all inclusive. They represent typical elements and criteria considered necessary to perform the job successfully.

**After reading this job description, as of this date would you require any accommodation to perform these duties?**

**[ ]  YES or** **[ ]  NO**

**Employee’s Signature: Date:**