

CITY OF HELENA



Position Title: Budget Analyst

Department: Finance

Division: Budget

FLSA: Exempt

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:

This position is responsible for planning, coordination and oversight of the City of Helena's budget and provides highly responsible and complex fiscal and technical support to the Chief Financial Officer.

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.*

Budget Development

In coordination with the Chief Financial Officer and other Budget Analysts, the Budget Analyst is responsible for preparation and presentation to the City Manager and Commission of the City's biannual budget. The budget preparation involves many detailed and complex processes completed in coordination with all departments.

The process starts generally in the fall with assisting in the development of the Comprehensive Capital Improvement Plan (CCIP). Development of the preliminary budget begins in January by updating personnel budgets including employee pay grades, classifications and helping review formal requests for change; estimating general revenues such as tax receipts and miscellaneous revenues and expenditures that are not specifically prepared by other departments; reviewing revenues and expenditures prepared by other departments for completeness, accuracy and conformance with procedures and regulations; and compiling department budget requests into a single document to present to the manager and commission. The budget document is prepared in a complex Excel document, containing multiple spreadsheets, with over 100 funds including governmental, special revenue, debt service, and proprietary funds. The Budget Analyst must ensure all fund cash flows, transfers, and inter-department charges are balanced and tied to financial records. The preliminary budget is reviewed with the departments and City Manager and then submitted to the Commission for input, direction and acceptance. Upon final adoption and close of the prior fiscal year, this position is responsible for preparation and printing of the final budget.

The Budget Analyst prepares a quarterly report for presentation to the Commission showing budget to actuals. In addition a detailed review of all revenues and expenditures is performed at mid-year with consultation from other departments; processing budget amendments and adjusting entries as necessary.

The incumbent provides indirect supervision, assistance, training and guidance to staff throughout the various City departments and divisions assigned to him/her regarding development, submission and management of budget processes, including the preparation of rate increases as directed; and prepares complete documentation for rate increases in compliance with appropriate laws, rules, codes, regulations, policies, and procedures. The position participates in special projects including research of new programs and services, and feasibility analyses.

Responsible for entering all budget amendments into the City's accounting software and the budget working file after necessary reviews and approvals have been completed. Ensures all necessary items are placed on the Commission's agenda timely.

Budget Analysts work as a team to ensure the above duties are completed accurately and timely.

Miscellaneous Studies and Duties

This position is responsible for coordinating with the City Controller to establish and maintain the chart of accounts and fund structure, and to review transactions that may be in error or that vary from budget authority.

Other studies are completed throughout the year at the request of other departments, the director, City Manager or Commission. These studies generally relate to department budgets and estimating the impacts of changes departments feel would be of benefit. These include many types of requests such as changes in personnel, rate change impacts, and reviewing and recommending approval of all budget adjustments requested during the year.

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 and of standard office and computer equipment
- Intermediate or Advanced use of Microsoft Office products, including Excel, Word and PowerPoint software
- 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 spreadsheet files and able to create new Excel spreadsheets as needed in the performance of assigned duties
- 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

Physical Demands:

The position requires the ability to perform sedentary physical work with the ability to lift and carry up to 10 pounds regularly and on occasion up to 50 pounds. The position must have the ability to perform body movements applicable to records management and an 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 with an emphasis in governmental budgeting, finance and/or accounting from an accredited college or university. The position requires two years of progressively responsible experience with 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 general direction from the Administrative Services Director

Supervision Exercised:

The position exercises indirect supervision over a wide variety of staff throughout the City for budget development and special studies.

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.