



CLASSIFICATION NO. 197
Established: 6/19
FLSA: Exempt
EEO: 2

BUDGET ANALYST

CLASS CHARACTERISTICS

Under direction, to perform journey-level professional budget analysis and technically complex budget duties; to participate in preparing and administering County and department-wide budgets; to monitor fiscal operations, analyze financial data to identify discrepancies or trends, forecast, or calculate costs, and develop budgetary resources; to work closely with departments to ensure they have the tools and information needed to successfully participate in budget planning and monitoring; to provide advice and counsel to management; and to do other work as required.

DISTINGUISHING CHARACTERISTICS

The Budget Analyst classification is used within the Department of Finance to provide journey to advanced level budget administration and analysis in support of the County-wide budget. Incumbents perform analysis of fiscal and budget data and formulate recommendations to provide management and departments with information for effective decision making and planning.

The Budget Analyst differs from the Budget Coordinator who coordinates and participates in preparing the County budget but has limited responsibility to perform analysis, recommend action, or advise management on budget operations. It differs from the Budget Analyst, Senior which performs more difficult, challenging, and highly technical and complex assignments requiring a higher degree of independent judgement and initiative. It also differs from the Financial Analyst classification which provides financial analysis for large departments in order to set rates or conduct forecasting and has broader oversight of comprehensive financial program and projects. It is also distinguished from classifications in the Management Analyst series which perform a variety of analytical work in support of administrative and operational systems and activities.

TYPICAL TASKS

Duties may include but are not limited to the following:

1. Participates in all aspects of budget development within a department, between divisions, or for the county as a whole; meets with department senior managers and staff to compile, develop, and analyze documentation regarding revenue, spending levels, or staffing requirements; participates in identifying programs' current service levels and developing/reviewing documentation for budget adjustment requests.
2. Develops, prepares, and at times presents budget analysis and forecasting of departmental expenditures and revenues and offers appropriate recommendations; analyzes and makes recommendations for funding requests.

3. Coordinates fiscal operations and systems with various departments/divisions.
4. Monitors budget status as budget is spent during the fiscal year; provides reports to assist departments and programs stay within approved budget limitations.
5. Analyzes and calculates cost allocation for internal services and indirect cost rates in compliance with federal regulations, particularly 2 CFR 200 as updated; applies cost accounting theory and methodology as appropriate; works with internal services departments to organize, assemble and maintain required documentation; provides assistance and advice to departments paying allocated costs regarding regulations, cost derivation methods and cost drivers.
6. Calculates and maintains listing/control of County full-time equivalent (FTE) positions; enters costs for COLA, insurance, salary, etc. by incumbent or position into County-wide budget software; ensures position information is accurate and up to date; maintains the salary and benefits forecasting database for personnel projection costs.
7. Prepares materials for County Commissioners, department managers, and other boards and committees regarding budget issues and opportunities; may act as representative on committees, task forces, and special projects; provides information and training to staff on budgets, expenditures, and revenue forecasting.
8. Develops and maintains databases, spreadsheets, and related management systems for budget development and administration.
9. Assists in the analysis and interpretation of federal, state, and local laws, regulations, policies, and procedures in order to ensure compliance; conducts analysis on best practices and trends, and formulates and implements recommendations; researches and answers financial and budget inquiries submitted by staff, management, other jurisdictions, and the general public.
10. Participates in the preparation of the County budget manual, and various budget books developed at different stages of the budget planning process.

REQUIRED KNOWLEDGE AND SKILLS

Thorough knowledge of: Principles, practices, methods and terminology related to governmental budgeting; 2 CFR 200; federal, state and local statutes, specialized knowledge of payroll and human resources information and processing systems, Generally Accepted Accounting Principles (GAAP) and governmental fund accounting; governmental budgeting policies, procedures, and operations; general laws and rules regulating and influencing government fiscal operations;

Working knowledge of: Government personnel and benefits rules, policies and procedures; techniques used to locate errors in budget records; computerized finance systems and how they aid in compiling, maintaining and using financial information; general office practices and procedures; application and use of standard office equipment; data processing as it relates to accounting records and applications; State of Oregon Local Budget Law ORS 294.305 to 294.365.

Skill to: Use financial management software and reporting systems; generate and reconcile budgetary reports, statements, projections and schedules; interpret, explain, and apply complex budget and fiscal-related laws, documents, ordinances, rules, regulations, policies and procedures; prepare and maintain accurate reports, spreadsheets and budget records; apply and adapt established budget principles and procedures to a variety of County fiscal applications; analyze data from various sources, draw logical conclusions, and make appropriate recommendations; communicate complex financial information and processes clearly and concisely, both orally and in writing; establish and maintain effective working relationships with co-workers, managers, customers, and the general public.

MINIMUM QUALIFICATIONS

Minimum qualifications are used as a guide for establishing the minimum experience, education, licensure, and/or certifications required for employment in the classification. The following minimum qualifications are established for this classification. Additional minimum qualifications and special conditions may apply to a specific position within this classification and will be stated on the job announcement.

Experience: A minimum of four (4) years of related experience that would provide the required knowledge and skills to perform the responsibilities of this position.

Licenses/Certifications: None Required.

PRE-EMPLOYMENT REQUIREMENTS

Driving may be necessary for County business. For position(s) with occasional/incidental driving, incumbents must possess a valid driver's license. Accommodation requests for an acceptable alternative method of transportation will be reviewed on an individual basis in compliance with State and Federal legislation. For position(s) with regular driving, incumbent(s) must also possess and maintain an acceptable driving record throughout the course of employment.