

Adopted: September 2001, Revised: July 2014

Class Title: Budget Team Leader

BRIEF DESCRIPTION OF THE CLASSIFICATION:

Responsible for advanced professional and lead work managing and supporting the preparation and administration of the City’s annual operating and/or capital improvement program budgets for departments and agencies. Implements a managed competition program, and other organizational effectiveness programs; coordinates operating budgets for City departments and outside agencies funded with general purpose funds, federal and state grant funds and HUD grants; and, coordinates the capital improvement program for the City. In addition, monitors position control in partnership with staff from the Human Resources Department to ensure that full-time and part-time positions are properly authorized and approved by the City Manager. Provides direction as the lead to Senior and entry-level Quality and Finance Analysts engaged in budget preparation, program evaluation, capital improvement programming and administrative research.

ESSENTIAL FUNCTIONS:

This information is intended to be descriptive of the key responsibilities of the classification. The following examples do not identify all duties performed by any single incumbent. Specific requirements of individual positions are described in the Job Description.

Physical Strength Code		ESSENTIAL FUNCTIONS
1	S	Assists with directing, planning, and supervising the preparation of all City operating budgets, capital improvement programs, and grants budgets. Assists with the management of the annual budget process, midyear budget reviews, year-end transfer process and carry over process; develops and presents funding and policy recommendation to the Budget Director. Ensures effective intra- and inter- team coordination to accomplish day-to-day functions of the department in various program areas; meets regularly with other team leaders to set and monitor short and long term project goals; ensures the availability of adequate personnel and work tools to complete projects effectively and within prescribed time frames. Develops and assigns studies and other analytical reviews with implications for administrative problem solving; conducts complex analytical studies; prepares detailed and comprehensive written reports with conclusions and recommendations; makes oral presentations regarding study findings and recommendations.
2	S	Provides expert advice and assistance to City management and City departments; develops budget plans and estimates. Interprets budget laws, policies, and regulations; analyzes the cost effectiveness of program operations; recommends alternate sources of program funding. Participates in the preparation of long range financial plans to include reviewing revenue and expense estimates prepared by departments, rationalizing proposed programs in terms of City priorities and existing commitments; and coordinating cross-departmental projects. Performs comprehensive analysis of special projects and prepares reports as requested by the Director. Plans, conducts, and leads complex analytical studies and research projects to assist executive management with long term planning and policy developments related to contemporary urban issues.

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Physical Strength Code		ESSENTIAL FUNCTIONS
3	S	Participates in employee selection, training and development, counseling, and performance evaluation activities, and recommends disciplinary action as necessary. May represent and act for the Director in his/her absence.
4	S	Researches, develops and maintains the department's automated budget business system. Prepares the monthly financial report for the Director. Researches and/or recommends changes in budget policy, procedures and development. Makes presentations to civic leagues and residents in the community.

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CLASS REQUIREMENTS:

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Formal Education / Knowledge	Work requires broad knowledge in a general professional or technical field. Knowledge is normally acquired through four years of college resulting in a Bachelor's degree or equivalent.
Experience	Five years progressively responsible professional analytical staff management experience including at least one year of experience in developing, analyzing and administering complex budgets. Requires at least one year of supervisory experience.
Certifications and Other Requirements	N/A
Reading	Work requires the ability to read financial data, various reports, and memos.
Math	Work requires the ability to perform general math calculations such as addition, subtraction, multiplication and division.
Writing	Work requires the ability to write financial data, various reports, and memos.
Managerial	Managerial responsibilities include allocating financial resources, verifying the accuracy of reports, and facilitating communication and teamwork.
Budget Responsibility	Researches documents, compiles data for computer entry, and/or enters or oversees data entry and has responsibility for monitoring budget expenditures (typically non-discretionary expenditures) for a work unit of less than bureau size.
Supervisory / Organizational Control	Work requires supervising and monitoring performance for a regular group of employees in a work unit including providing input on hiring/disciplinary actions and work objectives/effectiveness, and realigning work as needed.
Complexity	Work requires analysis and judgment in accomplishing diversified duties. Work requires the exercise of independent thinking within the limits of policies, standards, and precedents.
Interpersonal / Human Relations Skills	Contacts others within the organization. These contacts may involve similar work units or departments within the City which may be involved in decision-making or providing approval or decision-making authority for purchases or projects. Works with individuals outside the City who may belong to professional or peer organizations. Working with various state and federal agencies may also be required.

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OVERALL PHYSICAL STRENGTH DEMANDS:

SedentaryX	Light	Medium	Heavy	Very Heavy
S = Sedentary Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time	L = Light Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree.	M = Medium Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly.	H = Heavy Exerting 50-100 lbs. occasionally, 25-50 lbs. frequently, or up to 10-20 lbs. constantly.	VH = Very Heavy Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly.

PHYSICAL DEMANDS:

C = Continuously 2/3 or more of the time.	F = Frequently From 1/3 to 2/3 of the time.	O = Occasionally Up to 1/3 of the time.	R = Rarely Less than 1 hour per week.	N = Never Never occurs.
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This is a description of the way the job is currently performed; it does not address the potential for accommodation.

PHYSICAL DEMANDS	FREQUENCY CODE	DESCRIPTION
Standing	F	Office equipment, presentations
Sitting	F	Computer, desk work, meetings driving
Walking	F	Inter-office, to/from office equipment
Lifting	N	
Carrying	N	
Pushing/Pulling	O	Desk drawers, chair
Reaching	O	Across desk
Handling	O	Paperwork, office supplies
Fine Dexterity	F	Computer keyboard, calculator, writing
Kneeling	N	
Crouching	N	
Crawling	N	
Bending	N	
Twisting	N	
Climbing	N	
Balancing	N	
Vision	C	Computer, desk work, reading, driving
Hearing	C	Staff, supervisor, telephone, meetings
Talking	F	Staff, supervisor, telephone, meetings
Foot Controls	O	Driving
Other (specify)		

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MACHINES, TOOLS, EQUIPMENT, AND WORK AIDS:

ENVIRONMENTAL FACTORS:

D = Daily	W = Several Times Per Week	M = Several Times Per Month	S = Seasonally	N = Never
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HEALTH AND SAFETY		ENVIRONMENTAL FACTORS	
Mechanical Hazards	N	Dirt and Dust	N
Chemical Hazards	N	Extreme Temperatures	N
Electrical Hazards	N	Noise and Vibration	N
Fire Hazards	N	Fumes and Odors	N
Explosives	N	Wetness/Humidity	N
Communicable Diseases	N	Darkness or Poor Lighting	N
Physical Danger or Abuse	N		
Other	N		

PRIMARY WORK LOCATION	
Office Environment	X
Warehouse	--
Shop	--
Vehicle	--
Outdoors	--
Other (see 2 below)	--

PROTECTIVE EQUIPMENT REQUIRED:

NON-PHYSICAL DEMANDS:

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NON-PHYSICAL DEMANDS	
Time Pressures	F
Emergency Situations	N
Frequent Change of Tasks	F
Irregular Work Schedule/Overtime	F
Performing Multiple Tasks Simultaneously	F
Working Closely with Others as Part of a Team	F
Tedious or Exacting Work	R
Noisy/Distracting Environment	R
Other	N