

Adopted: September 2001 Revised: November 2014

Class Title: Director of Budget and Strategic Planning

BRIEF DESCRIPTION OF THE CLASSIFICATION:

Responsible for directing the preparation and administration of the annual operating and capital improvement program budgets. Develops long-range fiscal plan for the City that includes forecasting revenues and expenditures for numerous funding sources including Federal and State grants, general purpose funds, bonds, and special state revenues. Manages the preparation of revenue forecasts and midyear updates, and coordinates the application of grants citywide. Manages initiates, conducts, and implements administrative research and surveys to provide a basis for management control and decision making and applies sound research techniques and methods. Responsible for leading the effort to refine, implement and report on program budgets based on performance indicators for the city departments. Represents the City Manager before the City Council and the general public.

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	Plans, directs and supervises the preparation and administration of the annual operating budget that includes numerous funding sources; grants budgets, capital improvement programs and the long range financial plan. Plans, directs and coordinates the application and monitoring of grants citywide. Supervises the preparation of long-range financial plans and analyzing nation-wide economic trends to develop a long range financial plan.
2	S	Provides expert advice and assistance to City management; develops budget plans and estimates; interprets budget laws, policies and regulations; analyzes the impact of state legislation on the City’s financial condition; analyzes the cost effectiveness of program operations; and recommends alternate sources of program funding. Provides assistance with the development and justification of budgets and represents the City Manager by conducting hearings to resolve differences and facilitate decision making.
3	S	Serves as facilitator, advisor and technical expert in budget and performance management for the City Manager, City Council, City Departments, and the public; prepares and makes formal presentations to civic leagues and residents regarding the budget and financial matters. Assists the City Manager in developing, presenting and justifying the annual operations and capital budget to the City Council and public.
4	S	Supports the executive team with efforts of organizational change and development by assisting departments in developing strategic plans, business plans, benchmarks, performance measures, performance contracts, and other continuous improvement initiatives; performs process review, redesign and implementation of department activities. Plans, conducts and leads complex analytical studies and research projects to assist executive management and others with long-term planning and policy development related to contemporary urban issues. Reviews staff’s major research projects and resulting recommendations to provide guidance as to the implementation of recommendation.

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Physical Strength Code		ESSENTIAL FUNCTIONS
5	S	Responds to inquiries from the press, City officials, and the public regarding budget and financial issues and concerns.
6	S	Facilitates the development of performance indicators for all departments by creating interdepartmental teams of audit and budget staff to work closely with departments and agencies to develop and update outcome-based performance indicators. Oversees operations/performance audit studies for assigned functions of City operations, procedural analyses, and most specialized and difficult examinations for those having the greatest potential financial or operations impact.
7	S	Manages and supervises the recruitment, selection of staff.

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CLASS REQUIREMENTS:

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Formal Education / Knowledge	Work requires specialized knowledge in a professional or technical field. Work requires professional level of knowledge of a discipline equivalent to that which is acquired in a Master’s degree-level of study.
Experience	Five years’ experience at the senior management assistant level, including three years 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	Responsible for final approval of budgetary recommendations to the City Manager and monitors progress toward fiscal objectives and adjusts plans as necessary to reach them.
Supervisory / Organizational Control	Work requires managing and monitoring work performance of senior department managers including evaluating program/work objectives and effectiveness, establishing broad organizational goals and realigning work and staffing assignments for the department.
Complexity	Work is of the broadest scope dealing with highly complex concepts and issues of great importance to the City. Highly important policies, procedures or precedents are approved or rejected by individuals in this classification.
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:

Sedentary	X	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)	N	

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MACHINES, TOOLS, EQUIPMENT, AND WORK AIDS:

Computer, telephone, calculator

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 (see 1 below)	N		

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

- (1)
- (2)

PROTECTIVE EQUIPMENT REQUIRED:

NON-PHYSICAL DEMANDS:

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NON-PHYSICAL DEMANDS	
Time Pressures	F
Emergency Situations	R
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