

CITY OF SIMI VALLEY

BUDGET OFFICER

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

SUMMARY DESCRIPTION

Under administrative direction, participates in the activities and operations of the Administration Division within the Administrative Services department including preparing the City's preliminary and final budgets; coordinates assigned activities with other divisions, departments and outside agencies; prepares regular financial reports and analysis; and provides highly responsible and complex administrative support to the Administrative Services Director.

REPRESENTATIVE DUTIES

The following duties are typical for this classification. Incumbents may not perform all of the listed duties and/or may be required to perform additional or different duties from those set forth below to address business needs and changing business practices.

1. Oversee activities and operations in implementing the City's budget process; plan, direct and manage the coordination of City-wide budget activities; provide direction to departmental staff, present the annual budget to Council and provide oversight for production of the City's published budget documents.
2. Annually prepare the City's Capital Improvement Program (CIP) document, Five-Year General Fund Projection, and budget carryovers.
3. Serve as 'process owner' for the financial system's budget module providing technical oversight, trouble-shooting support, and end-user training.
4. Manage and participate in the development and implementation of goals, objectives, policies and priorities for assigned programs; recommend and administer policies and procedures.
5. Monitor the City's CIP programs; coordinate with departmental staff and Fiscal Services to ensure project budget/actual data is current and complete.
6. Prepare periodic financial reports and submit to Council; review departmental staff reports related to the budget; review, approve and process budget amendment requests.
7. Coordinate state and federal reimbursement processes for natural disasters; prepare reimbursement forms; respond to related correspondence; coordinate with project managers and State and Federal agencies.
8. Coordinate the annual City-wide SB90 claims reimbursement filings.
9. Coordinate with the Fiscal Services Division to ensure budget and financial/CAFR reports are in sync.
10. Coordinate with City management to forecast funding needed for personnel, benefits, equipment, materials and supplies; Develop and maintain budget-related report programs; prepare periodic financial reports to include budget-to-actual revenue and expenditure information; analyze significant variances and present information to City management.
11. Prepare adopted budget for upload to the financial information system.
12. Provide responsible staff assistance to the Administrative Services Director including on-demand financial analyses, preparation of RFPs, supervisory support and preparation or review of staff reports for Council presentation.

13. Attend and participate in professional group meetings; stay abreast of new trends and innovations in the fields of budgeting and public finance.
14. Respond to citizen inquiries and resolve complaints.
15. Perform related duties as required.

QUALIFICATIONS

The following generally describes the knowledge and ability required to enter the job and/or be learned within a short period of time in order to successfully perform the assigned duties.

Knowledge of:

Operational characteristics, services and activities of a municipal budget program.
Integrated accounting systems or enterprise resource planning systems.
Principles and practices of municipal budget preparation and administration.
Principles and practices of governmental accounting.
Generally accepted accounting principles.
Methods and techniques of analysis and investigation.
Principles of business letter writing and basic report preparation.
Modern office procedures, methods and equipment including computers and supporting software applications.
Principles and practices of program development and administration.
Pertinent federal, state and local laws, codes, regulations, and reporting requirements related to municipal accounting and finance administration.

Ability to:

Oversee and participate in the management of a comprehensive municipal budget program.
Participate in the development and administration of division goals, objectives and procedures.
Prepare and administer large and complex budgets.
Prepare clear and concise administrative and financial reports.
Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.
Research, analyze and evaluate new service delivery methods and techniques.
Interpret and apply federal, state and local policies, laws and regulations.
Read and interpret documents such as laws, regulations, and reporting requirements pertaining to municipal finance.
Speak effectively before groups and employees of the organization.
Communicate clearly and concisely, both orally and in writing.
Establish and maintain effective working relationships with those contacted in the course of work.

Education and Experience Guidelines - *Any combination of education and experience that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:*

Education/Training:

Equivalent to a Bachelor's degree from an accredited college or university with major course work in finance, accounting, public or business administration or a related field.

Experience:

Five years of increasingly responsible public finance or accounting experience including three years of budget development responsibility.

PHYSICAL DEMANDS AND WORKING ENVIRONMENT

The conditions herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

CITY OF SIMI VALLEY
Budget Officer (*Continued*)

Environment: Standard office setting.

Physical: Sufficient physical ability to work in an office setting; sit for prolonged periods of time; and operate office equipment including extensive use of a computer keyboard.

Vision: See in the normal visual range with or without correction; vision sufficient to read computer screens and printed documents.

Hearing: Hear in the normal audio range with or without correction.

Adopted: June 2003
Johnson & Associates

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