

ASSISTANT BUDGET ANALYST

DISTINGUISHING FEATURES OF THE CLASS: Under general supervision, an incumbent of this class is responsible for conducting budgetary analysis and control over an assigned departmental grouping. This is the basic professional level in this series and is distinguished from the Budget Analyst level by the lesser degree of complexity of the departmental assignments (factors determining complexity include the number of different funds, the number of employees, the range of occupations and the variety of services provided). Work is performed with considerable independence of action with wide latitude for the exercise of independent judgment within established policy, subject to final approval by a higher authority. Must be willing to work extended hours during the Budget preparation season. A staff relationship is developed with department heads and/or their managerial/ administrative staff in assigned County departments in order to keep informed of developments and changes in their functions. Supervision is not a regular responsibility of this class.

EXAMPLES OF WORK: (Illustrative only)

Gathers information of the functions of assigned departments to determine purpose, applicable laws and directives, programs, organization, and type of funds involved;

Analyzes assigned department's annual, supplemental and deficiency budget requests and develops recommendations for review by higher level budget officials;

Reviews departmental budget request submissions for conformance with established guidelines and format;

Reviews applicable program problem issues identified through various sources, such as Department of Finance audit and reports, departmental reports, budget in-depth studies, etc.;

Analyzes departmental budget requests in above problem areas as well as their justifications for new, continuing or expanding current program operations for reasonableness of need, cost and approach and drafts reports both verbally and in writing;

Prepares and discusses with supervisor, a summary of the requests' main fiscal and program issues and the strengths and weaknesses of the department's approach in each area;

Identifies and recommends problem areas for special study consideration;

Meets with Budget Director, Deputy Director and Associate Budget Director to discuss formal hearing questions and background information. Attends formal budget hearings as observer and advises supervisors on detailed matters as required;

Prepares periodic written reports of anticipated recommendations per established format as budget analysis continues. Meets with supervisor and unit head to discuss, explain and revise recommendations, in order to develop a recommendation;

EXAMPLES OF WORK: (Cont'd):

Meets with Budget Director, Deputy Director and Associate Budget Director to discuss recommendations and establish final Budget Office recommendations to the County Executive;

Adjusts departmental budget in accordance with the final decision of the County Executive;

Prepares and reviews drafts of narratives and other documents relating to recommended budget appropriations in assigned area;

Monitors assigned departmental program and fiscal operations to ensure that assigned budgets are executed in accordance with approved plans, applicable statutes and administrative guidelines;

Meets with management personnel to review departmental plans to maintain expenditures within the prescribed ceiling and to develop reporting systems to monitor expenditure progress;

Monitors compliance with approved expenditure plans by reviewing periodic activity and expenditure reports;

Analyzes requests for transfer and interchange of funds and positions between program or organizational components to meet changing conditions and makes appropriate determinations as to legality and reasonableness of interchange;

Reviews requests for new positions and reclassifications of existing positions and makes determinations based on approved organization structures, staffing patterns and availability of funds;

Conducts or participates in in-depth studies of issues, programs or operations of assigned departments' budgets or general functional area and makes appropriate recommendations for review by higher level budget officials;

Prepares draft responses to inquiries in assigned functional areas received by the Budget Director or the County Executive;

Uses computer applications or other automated systems such as spreadsheets, word processing, calendar, e-mail and database software in performing work assignments

Accesses protected health information (PHI) in accordance with departmental assignments and guidelines defining levels of access (i.e. incidental vs. extensive)

May perform other incidental tasks, as needed. .

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FULL PERFORMANCE KNOWLEDGE, SKILLS, ABILITIES AND ATTRIBUTES: Good knowledge of the principles of public administration, municipal budgeting, and administrative management; knowledge of Westchester County organization and operation and of its budgetary procedures and practices; knowledge of approved organizational structures and staffing patterns; ability to conduct organizational and operational evaluation and make recommendations or suggest alternate solutions; ability to comprehend and prepare statistical and other data for presentation to others; ability to gather and analyze pertinent data and draw appropriate conclusions; ability to identify critical factors and to formulate realistic proposals; ability to get along with others and maintain effective working relationships; ability to effectively use computer applications such as spreadsheets, word processing, calendar, e-mail and database software in performing work assignments; ability to read, write, speak, understand, and communicate in English sufficiently to perform the essential duties of the position; good judgment; integrity; initiative; tact; physical condition commensurate with the requirements of the position.

MINIMUM ACCEPTABLE TRAINING AND EXPERIENCE: A Bachelor's Degree* and two years of professional experience where the primary function of the position was in either: (a) governmental budgeting; or (b) accounting which involved governmental budgeting; or (c) organization and methods analysis (see definition below); or (d) fiscal management which included responsibility for budget preparation and evaluation.

SUBSTITUTION: Satisfactory completion of 30 credits* towards a Master's Degree* in Business or Public Administration, Accounting, or Economics may be substituted on a year for year basis for up to two years of the above stated experience.

NOTE: An equivalent amount of paid or unpaid experience in an approved Public Administration Intern program may be substituted for the above stated experience.

DEFINITION: To demonstrate experience in organization and methods analysis, candidates need to describe responsibility for analyzing organizational functions, processes, programs, or projects, etc., and performing the initial research, investigation of alternatives, identification of best solution, implementation, and modification as needed.

*SPECIAL NOTE: Education beyond the secondary level must be from an institution recognized or accredited by the Board of Regents of the New York State Education Department as a post-secondary, degree-granting institution.