

## BUDGET ANALYST

DISTINGUISHING FEATURES OF THE CLASS: Under general supervision, an incumbent of this class, located in the Budget Office, is responsible for a full range of budgetary analysis and control over an assigned departmental grouping and/or County operational function. Work involves reviewing, analyzing and making recommendations on requests by assigned County departments for the funding of their operations, functions and programs; monitoring the expenditure of approved resources for effective and efficient utilization; and performing in-depth organizational studies related to departmental issues, programs and operations. 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. Incumbents are expected 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. Does related work as required.

### EXAMPLES OF WORK: (Illustrative Only)

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

Analyzes assigned departments' 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 reports, departmental reports, budget in-depth studies, etc.;

Develops methods and procedures to research and find successful solutions to problems;

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 request's 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;

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

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

EXAMPLES OF WORK: (Illustrative Only) (Cont'd.)

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;

Meets with Budget Director and Deputy 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 programs 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 limits and to develop reporting systems to monitor expenditure progress;

Analyzes requests for transfer and interchange of funds and positions among 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;

Performs other incidental tasks, as required.

REQUIRED KNOWLEDGE, SKILLS, ABILITIES AND ATTRIBUTES: Good knowledge of the principles of public administration, municipal budgeting, and administrative management; good knowledge of Westchester County organization and operation, and of its budgetary procedures and practices; good knowledge of assigned department's programs, operations, goals, objectives and general background; good knowledge of organizational and operational evaluations and ability to make recommendations or suggest alternate solutions; ability to effectively use computer applications such as spreadsheets, word processing, calendar, e-mail and database software; ability to comprehend and prepare statistical and other data for presentation to others; ability to read, write, speak, understand and communicate in English sufficiently to perform the essential duties of the position; ability to get along with others and maintain effective working relationships; good judgment; integrity; initiative; tact; physical condition commensurate with the requirements of the position.

MINIMUM ACCEPTABLE TRAINING AND EXPERIENCE: A Bachelor's Degree\* and four years of professional experience where the primary function of the position was in organization and methods analysis\*\* or governmental budgeting.

SUBSTITUTION: Coursework toward a Master's Degree\* in Business or Public Administration, Accounting, or Economics may be substituted for each year of the above stated experience at the rate of thirty credits per year of experience.

\*SPECIAL NOTE: Education beyond the secondary 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.

\*\*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.

NOTE #1: Unless otherwise noted, only experience gained after attaining the minimum education level indicated in the minimum qualifications will be considered in evaluating experience.

NOTE #2: An equivalent amount of paid or unpaid experience in an approved Public Administration Intern program may be substituted for the above stated experience.