

**CITY OF GILROY
FINANCE DEPARTMENT
BUDGET OFFICER**

GENERAL DUTIES: Assume responsibility for the development, maintenance, and operation of the City's Financial Plan and Capital Improvement Budget (CIB); and to perform a variety of advanced and complex professional accounting functions involved with compiling, preparing, and monitoring the City budget. Work is performed under the general supervision of the Finance Director, but considerable latitude is granted for the exercise of independent judgment and initiative.

GENERAL REQUIREMENTS:

Personal Appearance - Is appropriate for the work environment and meets expectations for the proper image of the City, as per department policy.

Attendance - Follows department/City policy in regards to punctuality and attendance.

Compliance with Work Instructions - Follows all work instructions given, and completes all assigned duties. Follows the policies, rules, and regulations of the City and department.

Safety - Follows the Safety and Health Handbook, as well as other safety related standards, and avoids unnecessary risk to oneself, co-workers, citizens, and property.

Internal Relations - Conducts work in a manner which supports the overall team effort, and which avoids disruption of one's work and the work of others. Treats all City employees with respect. Takes responsibility to resolve differences. Finds solutions to problems. Respects racial, religious, ethnic and sexual differences of others, and avoids derogatory statements regarding these differences.

Customer Service - Conducts work that fosters public support for the City, that will lead to fewer complaints and claims against the City. Treats customers with respect. Follows the same rules that one expects the customers to follow. Respects racial, religious, ethnic and sexual differences of others, and avoids derogatory statements regarding these differences.

ILLUSTRATIVE EXAMPLES OF WORK:

1. Direct Budget Team staff activities related to budget/CIB preparation, completion, evaluation and on-going review.
2. Recommend improvements in policies and procedures to ensure efficiency and effectiveness of the Budget Team's work methods and practices.
3. Prepare and deliver budget and financial presentations to departments, City Council and others as needed.
4. Work with department heads and their designees to identify and solve budget issues. Assist

department and division heads in developing, presenting, and amending their budgets.

5. Analyze recommendations of the Budget Team and conduct meetings to resolve differences and facilitate decision making by the City Administrator.
6. Assist the City Administrator in presenting and justifying the annual operations and capital budget to the City Council and general public.
7. Coordinate with the Budget Analyst on integration of budget amendments/ transfers, revenue and expenditure analysis, and quarterly budget status reports.
8. Assist with the development of procedures to facilitate monitoring revenues, expenditures, encumbrances, and capital projects in compliance with federal, state and municipal ordinances.
9. Coordinate, plan, and supervise the day-to-day operations of the Budget Team, including counseling and/or mentoring staff as necessary, and completing annual performance reviews.
10. Work with the Budget Team to improve methods, communication, and customer service with other departments and general public.
11. Participate in the development of City-wide fiscal goals and objectives; advise and otherwise provide assistance to the Finance Director, the City Administrator, and the City Council in the analysis of legislation and issues affecting City fiscal operations and policies.
12. Conduct and coordinate internal and external audits of financial records; examine, analyze, and verify documents to ensure adherence to established internal controls and accepted professional standards.
13. Perform special projects and other related duties as required.

REQUIRED SKILLS, KNOWLEDGE AND ABILITIES:

SKILLS:

1. Communicate effectively, both verbally and in writing, including strong facilitation skills.
2. Analyze, interpret and report research findings and recommendations.
3. Maintain accurate and detailed records and make accurate arithmetic calculations.
4. Work on several assignments simultaneously, set priorities, meet deadlines, and work independently within established guidelines.

5. Perform a broad range of supervisory responsibilities over others.

KNOWLEDGE: Knowledge of:

1. Principles, practices, objectives and methods of municipal finance, accounting, auditing, financial forecasting and budget preparation.
2. Funding sources, principles of administration, organization and management.
3. Governmental accounting principles, applicable laws and regulations, and financial reporting practices.
4. Statistical, analytical, and research methods, techniques and procedures.
5. Project management.
6. Design, maintenance and implementation of management information system applications for accounting and budgeting functions.
7. Principles and practices of computer applications, including spreadsheet, database, word processing and presentation software.
8. General customer service principles and practices.

ABILITIES: Ability to:

1. Analyze and review budget and financial data to develop forecasts, trends and analysis.
2. Manage multiple priorities.
3. Analyze complex problems, evaluate alternatives and implement creative recommendations.
4. Establish, maintain, and foster positive and harmonious working relationships with those contacted in the course of work, including supervisor, co-workers, other departments, outside agencies, and the general public.
5. Use independent judgment, within established guidelines, in the course of undertaking assigned responsibilities.
6. Organize work, set priorities, meet deadlines, and complete assignments with minimal supervision.
7. Communicate clearly and concisely, both verbally and in writing.

8. Work effectively as a team member in developing and preparing quality finished products.
9. Identify data sources, collect and analyze information and prepare informative reports.
10. Provide technical and substantive direction to other staff members on budget operating matters.
11. Interpret and apply related laws, ordinances, rules, regulations, policies and procedures.

MACHINES/TOOLS/EQUIPMENT UTILIZED:

Typical office and field environments include the following:

1. Computer, keyboard and monitor
2. LaserJet or ink jet printer
3. Telephone or headset
4. Copier
5. Calculator
6. 10-key adding machine
7. Facsimile machine
8. Optical character reader
9. Postage meter and scale
10. Lettering machine
11. Microfiche reader
12. Binding machine
13. Digital camera
14. Paper shredder
15. Paper cutter
16. Plans, maps and blueprints
17. Presentation equipment, microphones, easels, overhead projectors, etc.
18. Plan-copying machine
19. Specialized computer software
20. Automobile

PHYSICAL DEMANDS:

Under typical office or field conditions, employee will perform the following physical activities which include handling files, books, binders, plans, and boxes of work-related material:

1. Sitting, for prolonged periods of time while working at a computer or attending meetings
2. Walking
3. Standing, during Council meetings or other public presentations
4. Kneeling
5. Bending/stooping
6. Twisting
7. Reaching
8. Carrying

9. Pushing/pulling, boxes of files or plans
10. Lifting up to 25 lbs.
11. Driving
12. Speed, in meeting deadlines and in using office equipment

SENSORY DEMANDS:

Under typical office and field conditions, employee utilizes these senses while using a computer, typewriter, telephone, fax machine, copier, adding machine, postage meter, paper shredder, paper cutter, plan, map, blueprint, camera, microphone, overhead projector, easel, or automobile:

1. Seeing
2. Speaking/Hearing
3. Touching
4. Smelling

ENVIRONMENTAL AND FLOOR SURFACE CONDITIONS:

Office Conditions:

1. Indoors: Typical office conditions, over 90% of the time.
2. Flooring: Low level carpeting, linoleum, tile, wood, and some exposure to asphalt.
3. Noise Level: Conducive to office settings with phones, copiers, and/or faxes.
4. Lighting: Conducive to normal office setting.
5. Ventilation: Provided by central heating and air conditioning.
6. Dust or Fumes: Normal, indoor levels associated with dust and odors from paper, blueprints, ink pens, plan copier, copy machines, or other office-related equipment.

Field Conditions:

1. Outdoors: Typical field conditions, less than 2% of the time.
2. Travel: Under varying conditions via automobile or plane, less than 8% of the time.
3. Flooring: Asphalt, grass, dirt, wood, carpeting, linoleum, tile, and uneven surfaces.
4. Noise Level: Minimal to low exposure to equipment noise when traveling in the field.
5. Lighting: Normal outdoor conditions, with some exposure to extreme weather conditions.
6. Ventilation: Heating and air conditioning provided by vehicle or plane.
7. Dust or Fumes: Normal to high outdoor levels of dust, pollen, or vehicle exhaust when conducting surveys or research or when traveling.

HAZARDS:

Mechanical or electrical exposure is minimal while properly using standard office equipment such as a telephone, computer, printer, copier, adding machine, fax machine, radio, paper shredder, paper cutter, microphone, overhead projector, etc.

When traveling in the field, there is some exposure to mechanical hazards while utilizing a vehicle.

ATMOSPHERIC CONDITIONS:

Minimal exposure to fumes occurs in the field, as well as in a typical office environment. Office exposure to fumes or gases may occur due to the use of copiers, dry erase pens, liquid paper, toner cartridges, ink pens, or other office supplies or equipment.

REQUIRED TRAINING, EXPERIENCE AND QUALIFICATIONS:

1. Bachelor's Degree from an accredited college or university with major course work in Accounting, Finance, Public Administration, or a closely related field.
2. Five (5) or more years of progressively responsible experience working with budgeting and financial activities, with three (3) years of supervisory experience. Consideration given for equivalent combination of experience and training which provides the skills, knowledge and abilities necessary to perform the work.
3. Extensive experience with budgeting and planning software systems and a high level of proficiency with Microsoft Office Database, especially Excel and word processing applications.
4. Possess and maintain a valid California Driver License and a safe driving record necessary to operate assigned vehicle(s).
5. Willingness to continue education and training by learning new skills as changes occur. Expand skills by taking additional courses and attending seminars, workshops and independent study.
6. Pass a post-offer medical examination, which includes a drug test.
7. Prefer non-tobacco user.
8. Pass a background check including a Department of Justice criminal record check for employment.