



**BUDGET ANALYST SENIOR  
155**

**DEPARTMENT:** Financial and Management Services/Budget and Accounting

**NATURE OF WORK:**

Performs highly responsible and complex professional and administrative budget work: planning, organizing, analyzing, evaluating, coordinating, and auditing the budget of James City County and a variety of other fiscal agencies. Work is performed under the general direction of the Director of Budget and Accounting.

**ESSENTIAL FUNCTIONS OF THE JOB:**

Researches and prepares the County's operating budget recommendation, capital planning and financing efforts. Assists in developing and implementing budget policy.

Analyzes financial operations and budget requests to resolve complex issues considering costs, benefits and resources.

Provides administrative oversight over the operating budget and ensures budget compliance. Approves contracts and purchases ensuring prior budget approval.

Monitors outside agencies receiving County contributions for operating and capital costs.

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 local issues, fee based and tax revenue, cost/benefit and break even analysis.

Develops revenue forecasting models. Conducts the most complex analytical studies; prepares detailed and comprehensive written reports with conclusions and recommendations; makes oral presentations regarding study findings and recommendations.

Develops proposals and forecasts reflecting many variables such as the effects of changing economic and fiscal policies, program funding trends and fluctuations, and the impact on short- and long-term plans and strategies.

Monitors revenues and expenditures throughout the fiscal year for compliance with budget projections; recommends alternative solutions to budget deviations.

Develops or acquires budget planning models built on a two-year operating budget and five year capital improvement plan, maintaining, enhancing and improving these models for both revenues and spending. Administers budgeting software system, including initial programming and program modification.

Creates a budget manual each year and provides training to all County departments and offices.

Participates on evaluative teams, as requested, for programs, positions, facilities, compensation and benefits.

Evaluates and makes recommendations in response to developer initiated fiscal impact statements.

Develops annual financial and economic trends data for inclusion in long-term planning with the Board of Supervisors and County departments.

Uses advanced database management techniques to analyze and interpret management information including demographic data, facility usage, and revenue trends. Prepares charts, graphs, and statistical tables to aid in presentation and consideration of budget programs.

Practices continuous learning through individual study, classroom training, seminars, and conferences.

Performs work safely in accordance with department safety procedures and the County Safety Program. Operates equipment safely and reports any unsafe work condition or practice to Supervisor.

May be required to report to work to serve customers during emergency conditions. May be assigned to report at a different time and location and to perform different duties as necessary.

Performs related work as required.

#### **REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES:**

Thorough knowledge of the concepts and details involved in developing, operating, monitoring, and modifying automated financial systems.

Thorough knowledge of microcomputers and skill in their use including spreadsheet, word processing, and database management.

Thorough knowledge of the principles of public budgeting, fiscal and economic analysis, and budget management.

Thorough knowledge of the cost/benefit relationships in a public service environment.

Thorough knowledge of data base management software and utilization.

Ability to apply technical and statistical knowledge in developing and interpreting financial models.

Ability to perform and oversee the use of analytical procedures and methods for identifying financial deficiencies and problems.

Ability to plan, organize, manage, and coordinate complex financial operations concurrently.

Ability to plan, organize, coordinate, evaluate, inform, and motivate staff in a positive and effective manner.

Ability to communicate effectively, both orally and in writing.

Ability to gather and analyze data and to recommend and implement policy and procedural changes resulting from such analyses.

**MINIMUM QUALIFICATIONS:**

Bachelor's degree (master's degree preferable) in finance, accounting, public administration, or a related field. Considerable professional experience, preferably in local government; experience in budgeting and a thorough familiarity with fiscal and budget analytic tools, including computer-based modeling.

**NECESSARY SPECIAL QUALIFICATIONS:**

Requires a post-offer credential check.

Requires a post-offer criminal history and sex offender record check.

Requires the ability to travel among various work sites.

Date: January 2008

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# IDENTIFICATION OF GENERAL APTITUDES AND PHYSICAL REQUIREMENTS

Position Title: Budget Analyst Senior Position Number: 155  
Department: Financial and Management Services Division: Budget and Accounting

The Americans with Disabilities Act requires that we identify the general aptitudes and physical requirements needed to perform the job listed above. Individuals who have the position must be able to perform all essential job functions unaided or with reasonable accommodation.

**I. Mental Abilities:** General learning ability. The ability to “catch on” or understand instructions and underlying principles.

- Ability to reason and make judgments
- Ability to understand and follow oral instruction
- Ability to understand and follow written instruction
- Ability to guide and/or give instructions
- Ability to make decisions in accordance with established procedures and policies
- Not essential to job function

**II. Verbal Abilities:** Ability to understand meanings of words and ideas associated with them and to use them effectively. To comprehend language, to understand relationships between words, and to understand meanings of whole sentences and paragraphs. To present information or ideas clearly.

## 1. Speaking/Talking:

- Answer telephone, radio or switchboard
- Communicating with County officials
- Communicating with general public
- Communicating with vendors
- Communicating with supervisors and/or with other employees
- Communicating with other \_\_\_\_\_
- Not essential to job functions

## 2. Hearing/Listening:

- Ability to distinguish between different tones
- For communication with County officials, public, vendors, supervisors and/or other employees
- Not essential to job function.

## 3. Reading: (ability to read and understand text)

- Essential to job function
- Not essential to job function

**III. Numerical:** Ability to perform arithmetic operations quickly and accurately.

- Ability to mentally perform accurate two digit calculations
- Ability to perform accurate calculations aided by a calculator, adding machine or measurement device
- Not essential to job function

**IV. Spatial Abilities:** Ability to comprehend forms in space and understand relationships of plane and solid objects. May be used in such tasks as blue print reading and in solving geometry problems. Frequently described as the ability to “visualize” objects of two or three dimensions, or to think visually of geometric forms.

- Essential function
- Not essential function

**V. Motor Coordination:** Ability to coordinate eyes and hands or fingers rapidly and accurately in making precise movements with speed. Ability to make a movement response accurately and quickly.

**1. Manual Dexterity:** Ability to move the hands easily and skillfully. To work with the hands in placing and turning motions.

- |                                                        |                                                                            |
|--------------------------------------------------------|----------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> Use telephone      | <input checked="" type="checkbox"/> Manipulate computer keyboard and mouse |
| <input type="checkbox"/> Use switchboard               | <input type="checkbox"/> Use postage machine                               |
| <input type="checkbox"/> Use radio/console             | <input type="checkbox"/> Use hand tools                                    |
| <input checked="" type="checkbox"/> Use a calculator   | <input type="checkbox"/> Use power tools                                   |
| <input checked="" type="checkbox"/> Use a copy machine | <input type="checkbox"/> Other: _____                                      |
| <input checked="" type="checkbox"/> Use a fax machine  | <input type="checkbox"/> Not essential to job function                     |

**2. Finger Dexterity:** Ability to move the fingers and manipulate small objects with the fingers rapidly or accurately. For example: electrical wiring.

- Essential to job function
- Not essential to job function

Explain: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**VI. Physical Demands:**

**1. Strength:** The quality, state or property of being strong. The power to withstand strain, force, or stress.

Please check (✓) in appropriate boxes below.

|                   | Ability to manipulate materials and/or equipment (lbs) |      |       |       |       |     | Frequency of Manipulation |            |              |
|-------------------|--------------------------------------------------------|------|-------|-------|-------|-----|---------------------------|------------|--------------|
|                   | 5-                                                     | 5-10 | 10-15 | 15-25 | 25-50 | 50+ | Occasionally              | Frequently | Continuously |
| <b>Lift</b>       |                                                        |      |       |       |       |     |                           |            |              |
| <b>Push/Pull</b>  |                                                        |      |       |       |       |     |                           |            |              |
| <b>Hold/Carry</b> |                                                        |      |       |       |       |     |                           |            |              |

Manipulation done from:  ground to waist  waist level  waist to shoulder  above shoulder  
(Check all that apply)

Not essential to job function:  Lift  Push/Pull  Hold/Carry (Check all that apply)

**2. Climbing:** To move up or mount by using the hands or feet.

| <u>Ladders</u>                                                    | <u>Stairways</u>                                                  | <u>Steps</u>                                                      |
|-------------------------------------------------------------------|-------------------------------------------------------------------|-------------------------------------------------------------------|
| <input type="checkbox"/> Step stool                               | <input type="checkbox"/> 1 flight                                 | <input type="checkbox"/> 1-2                                      |
| <input type="checkbox"/> 8' to 10' step ladder                    | <input type="checkbox"/> 2 flights                                | <input type="checkbox"/> 2-3                                      |
| <input type="checkbox"/> Extension ladder                         | <input type="checkbox"/> 3 or more flights                        | <input type="checkbox"/> 3-4                                      |
| <input type="checkbox"/> Other _____                              | <input type="checkbox"/> Other _____                              | <input type="checkbox"/> Other _____                              |
| <input checked="" type="checkbox"/> Not essential to job function | <input checked="" type="checkbox"/> Not essential to job function | <input checked="" type="checkbox"/> Not essential to job function |

**3. Ability to Stand, Sit, Walk, and Run:**

Please check (✓) in appropriate boxes below.

|              | Duration (hours/day) |     |     |     |     |    | Occasionally | Frequently | Continuously |
|--------------|----------------------|-----|-----|-----|-----|----|--------------|------------|--------------|
|              | 0-1                  | 1-3 | 3-5 | 5-7 | 7-9 | 9+ |              |            |              |
| <b>Stand</b> | ✓                    |     |     |     |     |    |              | ✓          |              |
| <b>Sit</b>   |                      |     |     | ✓   |     |    |              |            | ✓            |
| <b>Walk</b>  | ✓                    |     |     |     |     |    |              | ✓          |              |
| <b>Run</b>   |                      |     |     |     |     |    |              |            |              |

If walking or running, over what type of terrain?  flat  rough  both

Not essential to job function:  Stand  Sit  Walk  Run (Check all that apply)

**4. Stooping, Kneeling, Crouching, and /or Crawling:**

To bend forward or down from the middle of the waist or the middle of the back, to bend downwards, to lower oneself and/or to move freely on hands and knees.

**Daily Amounts**

- 0-5x     
  5-20x     
  20-50x     
  50+x  
 Other \_\_\_\_\_     
  Not essential to job function

**5. Reaching, Handling, Fingering, and/or Feeling:**

To stretch out, extend, or put forth a bodily part. To touch or grasp something, by extending or stretching. To touch, lift, hold or operate with the hands.

**Daily Amounts**

- 0-5x     
  5-20x     
  20-50x     
  50+x  
 Other \_\_\_\_\_     
  Not essential to job function

**6. Seeing: To perceive or comprehend by the sense of sight.**

Essential to job function: These characteristics are necessary (Check all that apply)

- Peripheral vision
- Night vision
- Focus (distinctness or clarity)
- Color perception (discriminate between colors)
- Depth perception (determine distance relationship between objects)

**VII. Driving: The ability to transfer or convey in a vehicle.**

| <b>Transmission</b>           | <b>Standard</b>                     | <b>Automatic</b>                    | <b>Multi-Gears</b>                  |
|-------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Car                           | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Van                           | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Small Truck                   | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Medium Truck                  | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Large Truck                   | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Truck w/Equipment             | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Heavy Bus Equipment           | <input type="checkbox"/>            | <input type="checkbox"/>            | <input type="checkbox"/>            |
| Not essential to job function | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Other (list) _____            |                                     |                                     |                                     |

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