

## SENIOR BUDGET ANALYST

DISTINGUISHING FEATURES OF THE CLASS: Under general supervision, an incumbent of this class, located in the Budget Office, acts as the lead budget analyst, is responsible for the full range of budgetary analysis and control over an assigned departmental grouping and/or County operational function, and coordinates workflow during the preparation of the County Budget. Work is performed with considerable independence of action and 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 work 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 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 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 Director to discuss recommendations and establish final Budget Office recommendations to the County Executive;

Participate in periodic Budget related technical exercises concerning budget development, budget modifications and expenditure monitoring functions;

Create and maintain internal multi-year forecasts;

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 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;

May perform other incidental tasks, as required.

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FULL PERFORMANCE KNOWLEDGE, SKILLS, ABILITIES AND ATTRIBUTES:

Thorough 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 program, operations, goals, objectives and general background; good knowledge of approved organizational structures and staffing patterns; ability to conduct organizational and operational evaluations and make recommendations or suggest alternate solutions; 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; ability to effectively use computer applications such as spreadsheets, word processing, calendar, e-mail and database software in performing work assignments; good judgment; integrity; initiative; tact; physical condition commensurate with the requirements of the position.

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

SUBSTITUTION: Credits earned 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.

\*\*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 Department of Education as a post-secondary, degree-granting institution.

NOTE #1: An equivalent amount of paid or unpaid experience in an approved Public Administration Intern program may be substituted for the above stated experience.

NOTE #2: Unless otherwise noted, only experience gained after attaining the minimum education level indicated in the minimum qualifications will be considered in evaluating experience.

West. Co.  
J.C.: Competitive  
NASE

Job Class Code: E0427  
Job Group: XIV