City of Portland Job Code: 30000570

CLASS SPECIFICATION City Budget Director

FLSA Status: Exempt

Union Representation: Nonrepresented/ Incumbents hired after January 4, 2008 are exempt from Civil Service

(Ordinance 181459)

GENERAL PURPOSE

Reporting to the Mayor and serving the entire Council, the City Budget Director serves as and performs the duties of the City's budget officer, as defined in Oregon Revised Statutes. Under general policy direction, plans, organizes and directs the activities of the City Budget Office; develops and administers the City's budget; provides capital budget planning and development; provides independent financial planning and operational review of the City's utilities; provides long-range financial forecasting for the City's funds; provides financial budget policy development and analysis; develops performance measurement systems; provides legislative analysis on all City ordinances; and performs related duties as assigned.

DISTINGUISHING CHARACTERISTICS

This single position class is responsible for managing, directing and integrating broad, comprehensive budget planning services for the City, including providing strategic leadership and information to the Council, Mayor, and bureaus in the development, implementation, and administration of the budget. Also responsible for developing and analyzing financial policy and performance measurement systems and providing this information to Commissioners and the Chief Administrative Officer; collaborating with the Office of Management and Finance on the development of financial forecasts and providing forecasting information to the Chief Administrative Officer when requested. Responsibilities are broad in scope, allow for a high degree of program and administrative discretion and are evaluated in terms of overall program and cost effectiveness.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Any one position in this class may not perform all the duties listed below, nor do the listed examples of duties include all similar and related duties that may be assigned to this class.

- 1. Plans, organizes, controls, integrates and evaluates the work of the City Budget Office; with subordinate supervisors and staff, develops, implements and monitors work plans to achieve bureau mission, goals and performance measures; directs the development of and monitors performance against the biennial bureau budget; manages and directs the development, implementation and evaluation of work programs, plans, processes, systems and procedures to achieve City and bureau goals, objectives and performance measures consistent with the City's quality and citizen service expectations.
- 2. Plans, organizes, directs and evaluates the performance of staff; establishes performance requirements and personal development targets; regularly monitors performance and provides coaching for performance improvement and development; provides compensation

- and other rewards to recognize performance; takes disciplinary action, up to and including termination, to address performance deficiencies, in accordance with City Charter, Code, human resources policies and labor contract agreements.
- 3. Works closely with the City's elected leadership in setting and carrying out the City's vision, mission and objectives for the bureau.
- 4. Provides leadership and works to develop and retain highly competent, service-oriented staff through selection, compensation, training and day-to-day management practices that support the City's and bureau's mission, objectives and service expectations; provides leadership and participates in programs and activities that promote workplace diversity and a positive employee relations environment.
- 5. Coordinates City-wide activities and personnel engaged in operating and capital budget development, preparation and administration; provides advice to all City bureaus on budget preparation and budget management issues; facilitates Council's decision-making related to the budget; coordinates review and refinement of the citizen outreach and involvement process to ensure citizen input into the budget development process.
- 6. Participates in the City's assessment, development and implementation of a corporate financial management system; directs and oversees efforts to automate the budget process; directs and oversees continuous improvement review of the budget process; provides leadership in the development and implementation of financial policies related to budget.
- 7. Provides support to City bureaus and other groups in assessing the budget impact of legislation, ballot measures, negotiations and other issues.
- 8. Analyzes, develops and reviews reports of findings, alternatives and recommendations involving a broad range of revenue, financing and financial planning issues; makes presentations to City management, the Council and Council committees and others on City financial status and operations; monitors developments related to budgeting matters and evaluates their impact on City operations and financial programs; recommends policy and procedural improvements.
- 9. Directs the analysis of proposed legislation and regulation; participates in industry and governmental activities to influence legislation and regulatory change consistent with the City's interests and needs; represents the City with other industry and governmental agencies, professional organizations and elected officials.

OTHER DUTIES

- 1. Assists as needed on special assignments and projects dealing with budget planning issues.
- 2. Participates in the analysis and/or introduction of proposed changes to federal, state and local laws, regulations and rules, as well as court decisions impacting the City's budget; works with the Chief Financial Officer and Chief Administrative Officer to develop appropriate strategies.

- 2. Represents the City in meetings with local and national media on issues relating to the City's budgetary and financial planning activities; represents the City in meetings with other governmental agencies in the state and across the country.
- 3. Represents the City and coordinates budgetary financial planning activities with other governmental agencies.

MINIMUM QUALIFICATIONS

Knowledge of:

- 1. Principles, practices, methods and techniques of budgeting for capital improvements and operations of public agencies.
- 2. Principles and practices of public agency capital financing.
- 3. Federal, state and local laws, regulations and court decisions applicable to assigned areas of responsibility.
- 4. City operations and functions and associated financial planning and budgeting issues.
- 5. Principles and practices of public administration, including maintenance of public records.
- 6. Research methods and statistical and financial analysis techniques.
- 7. Organization and functions of a city council.
- 8. Principles and practices of computer-based financial and budgeting systems.
- 9. Principles and practices of effective management and supervision.
- 10. City human resources policies and labor contract provisions.

Ability to:

- 1. Plan, direct and integrate a variety of complex financial planning and budgeting programs and activities.
- Evaluate budget programs and make recommendations for improvement.
- 3. Define complex budgeting issues, perform difficult and complex analyses and research, evaluate alternatives and develop sound conclusions and recommendations.
- 4. Understand, interpret, explain and apply City, state, and federal policy, law, regulation and court decisions applicable to areas of responsibility.

- 5. Analyze, interpret and explain proposed legislation and programs in terms of impact on the work of the Office and the City's budgeting and short- and long-term budgetary financial planning goals and objectives.
- 6. Make oral presentations of proposals and recommendations clearly, logically and persuasively in public meetings.
- 7. Represent the City effectively in negotiations and other dealings on a variety of issues.
- 8. Prepare clear, concise and comprehensive budgetary financial statements, correspondence, reports, studies and other written materials appropriate to both technical and non-technical audiences.
- 9. Exercise sound, expert independent judgment within general policy guidelines.
- 10. Establish and maintain effective working relationships with all levels of City management, other governmental officials, employees and the public; exercise tact and diplomacy in dealing with sensitive, complex and confidential issues and situations.

Training and Experience:

A typical way of obtaining the knowledge, skills and abilities outlined above is graduation from a four-year college or university with a major in finance, accounting, business administration, or a closely related field; and at least ten years of progressively responsible budget and finance experience, including the development and management of budgets, at least five years of which were in a supervisory or management capacity; or an equivalent combination of training and experience. Experience in a governmental setting and masters or higher graduate degree in a relevant field are preferred.

PHYSICAL AND MENTAL DEMANDS

Persons with disabilities may be able to perform the essential duties of this class with reasonable accommodation. Reasonable accommodation will be evaluated on an individual basis and depends, in part, on the specific requirements for the job, the limitations related to disability and the ability of the hiring bureau to accommodate the limitation.

Class History:

Adopted: 07-01-02

Class created as a result of Nonrepresented Classification & Compensation Study, 2000-2002. This class is composed of positions from the following class(es):

0836 FINANCIAL PLANNING DIRECTOR. Adopted: 06-15-82; Revised: 08-19-86, 07-01-92, 05-12-00

June 2009 - Change Job Class number from 7379 to 30000570, due to system change. Revised:

December 12, 2012 – Via Ordinance, title change from Financial Planning Division Manager to City Budget Director and edits to focus on budget emphasis of work and new reporting relationship directly to Mayor.