

**CLASS SPECIFICATION**

**Assistant Budget Director**

FLSA Status: Exempt  
Union Representation: Nonrepresented

**GENERAL PURPOSE**

Under general policy direction, leads the development and analysis of the City budget; supervises budget analysts; oversees Citywide budget processes; assists the City Budget Director and elected officials to set and carry out bureau objectives and city budget policies; acts as the Budget Director in the Director's absence; develops and administers bureau budget and manages other administrative bureau functions; and performs related duties as assigned.

**DISTINGUISHING CHARACTERISTICS**

This single position class is responsible for overseeing various citywide budget development and analysis processes, including annual budget, Capital Improvement Plan (CIP) and Budget Monitoring (BMP) processes, either directly or through reporting analysts; supervises budget analysts – providing guidance on analysis approaches and methods, reviewing draft analyses and presentations, and coordinating budget office interactions with City Council.

The City Budget Director, Assistant Budget Director and budget analysts work closely together to develop and present the overall annual City budget. Analysts review and make recommendations on individual bureau budget submissions, discussing mid-level recommendations with the Assistant Budget Director (large dollar amounts, issues that involve city-wide policy or are potentially controversial) and higher-level issues with both the Director and Assistant Director (such as issues of citywide importance or that are known to be controversial).

The Assistant Director differs from the City Budget Director by managing the operational aspects of budget development and the initial review of recommendations. The City Budget Director has final review of completed recommendations, addresses the most controversial, highest impact issues and has ultimate responsibility for budget processes and for overall budget policy, performance measurements, development of long range financial forecasting, legislative analysis on all City ordinances, operational review of city utilities and providing strategic guidance to City Council.

**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 assigned staff; develops, implements and monitors work plans to achieve bureau mission, goals and performance

measures; directs the development of and monitors performance against the 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. 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.
4. Represents the City Budget Director in the Director's absence; works closely with bureau director in setting and carrying out bureau objectives and policies; responds to media inquiries as delegated.
5. Establishes and coordinates processes and systems used by bureaus to input the annual budget; plans and communicates timing and procedures; provides training and guidance to budget analysts and budget staff in all City bureaus; reviews financial budgeting system operations; gathers input from Budget Office and bureau budgeting staff; analyzes and researches alternatives; recommends and implements systems changes and improvements.
6. Oversees staff who coordinate the Capital Improvement Project (CIP) budget process, the BMP processes, and ongoing, routine budget monitoring and reporting; provides advice to all City bureaus on budget preparation and budget management issues.
7. Supervises budget analysts' review and analysis of bureau budgets; provides templates, guidance and advice on analyses formatting, verbiage and content; reviews analyses and provides feedback; participates in team discussions on overall budget roll-up and Budget Office recommendations.
8. Coordinates Budget Office interactions with City Council and citizen/community groups; supervises development of materials, presentations and briefings information; organizes and presents briefings to Council; assists the bureau director in facilitating council's decision-making related to the budget; coordinates review and refinement of citizen outreach and involvement.
9. Performs and oversees a variety of operational and administrative duties for the Budget Office, including developing and administering the bureau budget; initiates, conducts and

participates in studies of bureau operational and administrative processes and practices; identifies process, productivity and cost improvements; recommends changes to improve productivity and service while reducing costs.

10. Performs complex, specialized financial, revenue, budgetary, or management studies and analyses; identifies issues, determines techniques, and obtains needed data; researches national practices and trends; evaluates community and administrative issues; analyzes alternatives; prepares option papers; conducts cost benefit analyses and other studies; develops presentations and reports and presents recommendations.

### **OTHER DUTIES**

11. Represents the bureau on various committees, groups and boards as assigned.

### **MINIMUM QUALIFICATIONS**

#### **Knowledge of:**

1. Principles, practices and methods of municipal budget development and management, including capital improvement budgeting.
2. State Budget Law, City financial and budgeting policies, City Charter and code related to fiscal management and any other Federal, state and local laws, regulations and court decisions applicable to assigned areas of responsibility.
3. City operations and functions and associated financial planning and budgeting issues.
4. Advanced principles, practices and methods for analysis of administrative, organizational, economic and procedural subjects, including financial forecasting and statistical modeling techniques.
5. Principles and practices of public administration, including purchasing, contracting and maintenance of public records.
6. Principles and regulations governing public financing.
7. Organization and functions of a city council.
8. Principles and techniques of project planning and management.
9. Principles and practices of computer-based financial and budgeting systems.
10. Principles and practices of effective management and supervision.
11. City human resources policies and labor contract provisions.

**Ability to:**

1. Make oral presentations of proposals and recommendations clearly, logically and persuasively in public meetings.
2. Prepare clear, concise and comprehensive budgetary financial statements, spreadsheets, correspondence, reports, studies and other written materials appropriate to both technical and non-technical audiences.
3. Exercise sound, expert independent judgment within general policy guidelines.
4. Establish and maintain effective working relationships with elected officials, bureau managers and staff, community organizations, other governmental officials, and the media.
5. 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 seven years of progressively responsible budget and finance experience, including the development and management of budgets, at least three years of which were in a supervisory, management or team lead 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: Adopted by Council August 7, 2013, retroactive to 1-8-13.