

## Budget and Financial Planning Manager

### **Definition**

Under direction from the County Budget Director, to plan, organize, coordinate, and direct the day-to-day operations and staff of the County Executive's Office of Budget and Analysis (OBA).

### **Distinguishing Characteristics**

The Budget and Financial Planning Manager classification is distinguished from the County Budget Director classification in that the County Budget Director has overall control and responsibility for the Office of Budget and Analysis, under policy direction from the County Executive. The Budget and Financial Planning Manager is primarily responsible for the immediate supervision of Budget and Public Policy Analysts, Financial and Economic Analysts, and others involved in the preparation and maintenance of the County budget, long-term financial planning, financial analysis, evaluation of County programs, organizational review, and similar analyses.

### **Typical Tasks**

- Manages the day-to-day operations and staff of the assigned functional area;
- Coordinates the preparation and presentation of the recommended budget, adopted budget, and financial projections;
- Prepares annual goals and objectives for areas of responsibility involving subordinates;
- Guides and directs subordinates performing the following functions: budget, financial planning, financial analysis, management, and organizational and program analyses;
- Provides analysis, prioritization, and/or feasibility studies of functions with a budgetary impact, or policy analysis, as needed;
- Develops policy and procedure recommendations for the preparation and maintenance of the County budget;
- Plans, assigns, directs, and reviews the work of staff engaged in budget, public policy, and financial analysis;
- Evaluates the performance of staff;
- Provides training and staff development aimed at integrating new staff into the OBA team and maximizing the potential of existing staff;
- Interprets and explains policies, rules, and procedures and formulates recommendations for improvements;

- Monitors expenditures and recommends appropriate action;
- Evaluates existing programs and activities and makes recommendations for improvement;
- Ensures quality and timeliness of work assignments;
- May be assigned as a Disaster Service Worker, as required;
- Performs other duties as required.

### **Employment Standards**

Sufficient education, training, and experience to demonstrate the possession and direct application of the following knowledge and abilities:

**Training and Experience Note:** The required knowledge and abilities are attained through training and experience equivalent to a Bachelor's degree in Economics, Accounting, Business, Public Administration, or a related field;

and

Three (3) years of professional level experience developing and maintaining complex governmental budgets and/or conducting financial planning and analysis in a large and diverse public organization, with at least two (2) years in a supervisory or lead capacity.

### **Knowledge of:**

- Principles and practices of supervision and personnel management;
- Principles, practices, and theory of governmental budgeting and accounting;
- Principles and practices of financial planning;
- Administrative problems common to the operation of governmental agencies;
- Principles of governmental organization and administration;
- Methods and techniques of public financing;
- Economic analysis and forecasting techniques;
- Principles of management analysis and organizational design necessary to formulate administrative policies and procedures;

- Principles and practices of various budgeting processes, including performance-based budgeting, zero-based budgeting, and incremental budgeting;
- Administrative survey and analytical principles and techniques;
- Federal, State, and local funding sources.

**Ability to:**

- Effectively plan, assign, direct, and review the work of subordinate staff engaged in budget, management, organizational, program, and financial analysis and evaluation;
- Assist in planning, organizing, and administering a comprehensive budget or financial planning program;
- Recommend new and revised policies and procedures necessary for budget and financial program administration;
- Train and develop staff;
- Communicate effectively, both orally and in writing;
- Establish and maintain effective working relationships with subordinates, other staff of the County Executive's Office, elected and appointed officials, County management, and departmental staff.

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