

# CITY OF HELENA



**Position Title:** Budget and Studies Mgr **Department:** Admin Services  
**Position #:** 14220 **Grade:** 152  
**EEO Category:** (05) Para-professional **FLSA:** Exempt  
**EEO Function:** (01) Financial Admin **Work Comp Code:** 8743

## **DEFINITION**

Under general direction, plans, coordinates, directs, manages, and oversees the City's budget development, including on-going budget monitoring, and all related annual, capital improvement, rate study and feasibility study activities for the City. Provides highly responsible and complex administrative support to the Administrative Services Director. Provides professional training, supervision, guidance and support to all budgetary staff throughout City departments. Provides professional support and assistance for the City's annual audit process and internal audit program.

## **SUPERVISION RECEIVED**

Under general direction of the Administrative Services Director

## **SUPERVISION EXERCISED**

Exercises direct supervision over the Administrative Assistant III and indirect supervision over a wide variety of staff throughout the City operations for budget development and special studies.

## **EXAMPLES OF IMPORTANT AND ESSENTIAL DUTIES**

Plans, develops and coordinates preparation of the City's annual operating budget.

Provides budget consultation and guidance to department heads and their staff, City Manager, and City Commission.

Supervises and trains staff throughout the various City operations to perform budget development and management functions.

Conducts mid-year budget reviews with all departments.

Coordinates with the City Controller to establish and maintain the chart of accounts and fund structure, and to review transactions that vary from budget authority.

Plans, develops and coordinates preparation of the Capital Improvement Programs and related presentation documents in cooperation with other departments.

Plans, develops and coordinates the annual water and sewer rate study, Performance Measure, and other fee structure studies as needed.

Conducts other management studies as needed.

## **OTHER JOB RELATED DUTIES**

Acting department head in the absence of the Administrative Services Director.

Provides professional support and assistance with the preparation of the Comprehensive Annual Financial Report and annual audit

Provides professional guidance, assistance and support to the City's internal audit program.

Performs other duties and assumes other responsibilities as apparent or assigned.

### **SAFETY RELATED DUTIES:**

Abide by the City of Helena and department/division work practices established for specific job assignments and occupations.

Report occupational injuries, illnesses and near misses immediately to their supervisor. Follow supervisor instructions for obtaining first aid and/or medical attention. Participate in accident investigations as requested by the supervisor.

Participate fully in safety training. Suggest improvements in safety training requirements or programs to the supervisor or the safety committee.

Identify unsafe work conditions and unsafe practices. Correct hazards or report them to the supervisor or safety committee as appropriate.

### **JOB RELATED AND ESSENTIAL QUALIFICATIONS**

#### **Knowledge of:**

The principles, methods and practices of municipal accounting and budgeting;

Modern office practices and procedures and of standard office and computer equipment;

The approved principles and standard practices of budgetary and accrual accounting and budgeting;

Business and management principles involved in strategic planning, resource allocation, leadership technique and coordination of personnel and resources; and

Various software used for communications, budgeting, accounting and data analysis.

#### **Skill to:**

Communicate effectively both orally and in writing;

Establish sound priorities on work assignments so as to assure an orderly and timely work flow for budget development and management studies;

Supervise, train, motivate and evaluate technical and clerical employees in the division;

Use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems;

Identify complex problems and review related information to develop and evaluate options and implement solutions;

Consider the relative costs and benefits of potential actions to choose the most appropriate one;

Understand the implications of new information for both current and future problem-solving and decision-making; and

Manage one's own time.

#### **Ability to:**

Establish and maintain a favorable, effective and cooperative work relationship with all department heads, employees and officials of City government;

Prepare City budgets and studies in a complete, accurate and timely manner;

Keep abreast of new and improved budget, performance measure and other special reporting methods;

Maintain a favorable interdepartmental working climate for budget and study development so that employees are trained and motivated to work up to their full potential;

**Ability to cont.:**

Implement and maintain good supervisory practices with all budgetary staff in each department;  
Maintain highest degree of discretion and integrity when handling confidential data;  
Initiate, plan, develop and implement complex budgets and studies;  
Develop, recommend and/or interpret policies to be implemented throughout the City operations for budget and management studies;  
Communicate complex information verbally and in writing; and  
Create, maintain and make use of complex spreadsheets used in the budget process and other areas as needed.

**Physical Demands**

Ability to lift and carry up to 10 pounds regularly and on occasion up to 50 pounds  
Ability to perform body movements applicable to records management and an office environment  
Possession of hand/eye coordination adequate to operate a computer and calculator, and operate a vehicle  
Ability to talk and hear in person and by telephone  
Ability to see and read instructions, spreadsheets, reference materials and computer reports

**Work Environment**

Majority of work is performed in an office environment;  
Outside work is performed in an environment where hazards are controllable

**Experience and Training Guidelines:**

*Any combination equivalent to experience and training that would provide the required knowledge, skills, and abilities would be qualifying. A typical way to obtain the knowledge, skills, and abilities would be:*

**Experience:**

Five years of progressively responsible experience emphasizing governmental budget, finance and/or accounting, including 3 years of administrative supervisory experience.

**Training:**

Bachelor's degree in Accounting, Business or Public Administration. Emphasis on governmental budget, finance and/or accounting. Master's degree is desirable.

**License or Certificate:**

Possession of a valid driver's license  
Possession of or ability to obtain CPA or CPFO certificate

**After reading this job description, as of this date would you require any accommodation to perform these duties?**

**YES or NO (circle one)**

**Employee's Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_