

Jurisdictional Class: Competitive  
Adopted: December 17, 1993  
Revised: March 1, 2017

**BUDGET ANALYST**

**DISTINGUISHING FEATURES OF THE CLASS:** These duties involve responsibility for performing audits and analyses on expenditures, budget requests, estimated revenues, and expenditures, performs total budget and fiscal forecasting and analysis, and reviews other fiscal aspects to determine the legality and conformance with budget policies. In addition, the work involves auditing warrants and claims and authorizing payment of monies in accordance with budget appropriations. This work is performed under general supervision with leeway allowed for the exercise of independent judgment. Supervision may be exercised over the work of a small number of subordinate employees engaged in clerical or accounting duties. The incumbent does related work as required.

**TYPICAL WORK ACTIVITIES:** (Illustrative only)

Researches and compiles data regarding operating and capital expenditures for inclusion in the annual budget;  
Assists department heads in keeping expenditures in line with appropriation;  
Performs analysis of the operating activities to improve departmental efficiency and reporting capabilities;  
Reviews revenue estimates and Capital Project requests;  
Administrates capital contracts as they relate to budget matters;  
Assists in preparation of claims to the State and Federal governments;  
Continually reviews and develops criteria for the preparation of all budgets;  
Coordinates and analyses annual budget requests of departments and adjusts them to conform to the budget request policy;  
Makes recommendations on budget requests by editing requests and justifying approved requests for the proposed annual budget;  
Conducts studies as needed on estimated revenues, estimated expenditures, and other fiscal aspects;  
Reviews and analyzes department requests for fund transfers between accounts;  
Acts as backup for auditing and purchasing functions and assists when necessary;  
Ensures that sufficient copies of the budget are available;  
Assists in auditing expense vouchers against budgetary appropriation to establish validity of claims and manner by which accounts will be charged;  
Maintains a computerized fixed asset inventory system used for financial statement reporting and insurance purposes;  
Assists in the preparation and disbursement of vendor checks;  
Assists in maintaining capital project accounts which includes assuring that approval has been made for payment, contracted rates are being adhered to, and project balances do not exceed appropriations;  
Assists in maintaining a vendor information retrieval system and frequently reports on vendor payments as requested;  
Reviews, processes, and forwards to appropriate state department per capita aid and other state aid reports;  
May be responsible for supervising subordinate employees engaged in a variety of clerical or fiscal duties;  
Compiles data and provides information necessary for the annual indirect cost report.

## Budget Analyst

### **FULL PERFORMANCE KNOWLEDGE, SKILLS, ABILITIES & PERSONAL CHARACTERISTICS:**

Good knowledge of the principles of budget preparation, local government organization and function;  
Good knowledge of modern methods of budget analysis and financial analysis;  
Good knowledge of the modern principles and practices of budgeting and finance;  
Good knowledge of office practices and procedures;  
Good knowledge of mathematics and English usage;  
Working knowledge of modern economic principles;  
Working knowledge of basic research procedures;  
Ability to analyze operating trends from records and other material;  
Ability to analyze and evaluate financial and business management procedures in departmental administrative levels;  
Ability to prepare simple statistical and brief narrative reports;  
Ability to prepare and control municipal budgets;  
Ability to compile records and reports;  
Ability to maintain complete files;  
Ability to establish and maintain effective working relationships;  
Ability to prepare comprehensive reports;  
Ability to organize work;  
Ability to plan and supervise the work of others;  
Accuracy;  
Sound judgment.

### **MINIMUM QUALIFICATIONS:** Either:

- (a) Graduation from a regionally accredited or New York State registered college or university with a Bachelor's Degree in Accounting, Business Administration, or related field and one (1) year of experience in the organization, preparation, and application of a municipal or corporate financial operations, which shall have included budgeting, auditing, or accounting; or
- (b) Graduation from a regionally accredited or New York State registered college or University with an Associate's Degree in Accounting, Business Administration or related field and three (3) years of experience as described in (a) above; or
- (c) An equivalent combination of training and experience as defined by the limits of (a) and (b) above.