

## **The Maryland-National Capital Park and Planning Commission**

TITLE: Corporate Budget Analyst III

GRADE: 28

DATE: 7/9/2018

SERIES: Corporate Budget

CODE: 1285

EEO: Professionals

FLSA: Exempt

### Class Definition:

Under direction, performs a wide range of Commission-wide budgetary review and analysis functions to assist, in a senior level capacity, the Corporate Budget Director in the formulation, justification, presentation and execution of operating and capital budgets (annual budget and multi-year projections), and assists/guides departments with their budget submissions for consideration and consolidation into the Commission's budget. Reviews departmental budget submissions regarding form, content, accuracy, completeness and compliance with guidelines; writes and edits budget facts and justifications; assists with preparing and publishing the adopted budget; reconciles proposed expenditures with estimated revenues; and performs related work. Ensures completeness, soundness, sufficiency and, as pertinent to the assignment, integration of work across funding areas. Makes recommendations to implement or improve budget policies, processes and procedures or make other enhancements in budget management; guides less experienced budget personnel. Some work is highly confidential or highly sensitive. On a regularly recurring basis, the work has important impact on budget management, including high profile or high stakes matters, mainly Commission-wide. Applies comprehensive knowledge of budgeting along with good working knowledge of the functional and programmatic domains of the Commission altogether to ensure one's own work products and services are effective. Independently performs various types of analyses and solves conventional, non-standard and challenging problems. Interacts with people inside and outside the organization to coordinate, instruct, guide, advise and obtain agreement or compliance or achieve other desired actions. Performs other duties, as assigned.

Work is assigned in terms of functions, priorities, requirements of specific assignments, known or suspected problems. The incumbent independently plans and carries out the work in conformance with these parameters, established policies or procedures and accepted practices of the field of work, and resolves commonly encountered problems by selecting and applying, or adapting and adjusting, the applicable guides. The incumbent is to keep the supervisor informed and to seek assistance only for highly complex or very sensitive matters. Work is expected to meet objectives effectively – the incumbent is held responsible for results, and is evaluated in terms of quality, quantity, timeliness, teamwork, customer service and such other factors as use of skill and ingenuity in overcoming technical and non-technical problems.

### Examples of Important Duties (Estimated Percentages):

1. Budget formulation, justification, presentation and execution (±70%)
  - Assists, in a lead (or senior) capacity, with the preparation and presentation of the Commission's budget document. Reviews departmental budget submissions regarding form, content, accuracy, completeness and compliance with guidelines; writes and edits budget facts and justifications; and reconciles proposed expenditures with estimated revenues. Leads in development of the annual pay/benefit projections. Creates subsidiary schedules in support of the budget.

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- Prepares highlights, statistical charts and graphs in support of budget presentation. Assists in the presentation of the budget (and all supporting documents) before the Planning Board or County Councils, as assigned.
- Reconciles changes in the proposed budget to create the adopted budget. Prepares and publishes the adopted budget.
- Conducts budget/fiscal impact studies and other special management studies, as assigned, which include use of complex spreadsheet formulas, and use of mathematical or statistical models. Prepares specialized budget reports and projections of revenue and expenditure reports to fulfill management objectives. Develops and uses economic assumptions.
- Reviews monthly budget account statements for expenditure trends. Prepares monthly and quarterly budget reports for the Commission that reflect budget amendments and transfers.
- Conducts six-and nine-month expenditure reviews of operating departments' budgets in conjunction with the Finance Department to monitor expenditure levels and to determine funding levels and availability.
- Attends meetings, hearings and work sessions; represents the Corporate Budget Director in his/her absence. Shares responsibility as main contact for budget-related inquiries.
- Interprets budget data and trends in fund activity, instructs line managers or directors in selection of proper sources of funds to achieve management objectives, reviews requests having fiscal implications to the Commission, and responds to those requests.
- Participates in expenditure reviews, prepares statistical data/charts, and participates in budget work sessions with Commission staff and with Montgomery County and Prince George's County government staff.
- Monitors departmental expenditures for compliance with budget. Closes out the budget.
- Recommendations for improvements in budget policies, processes and procedures or makes other enhancements in budget management such as better ways to guide or advise line personnel.

### **2. Other (±30%)**

- Maintains confidentiality of data including legally-protected personal information, proprietary and pre-decisional information not subject to public information disclosure, sensitive budgetary and programmatic data, and other sensitive information.

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- Stays informed of developments in budget management, budgetary aspects of programs and operations, and of changes in guidelines applying to the areas of work focus.
- Communicates and interacts effectively with business contacts. Establishes and maintains, or enhances, working relationships, including teamwork, with internal and external contacts. Actively listens to ascertain key information, including perspectives, concerns, wants and needs of stakeholders, in relation to budget management matters; seeks to obtain agreement, gain compliance or achieve other desired results.
- Uses a computer and modern office suite software (such as MS Office), enterprise software and specialized software for planning, scheduling, communicating (email), word processing, budgeting, manipulating data, preparing presentations, reporting time and attendance, requisitioning, researching (the Internet), and performing other functions.
- Provides guidance to less experienced budget personnel in corporate level budget guidelines, interests-concerns, formulation, justification, presentation and execution.
- Performs periodic maintenance functions within enterprise budgeting software; trains and provides support for departmental users.

### Important Worker Characteristics:

- A. (1) Comprehensive knowledge of, and skill in applying, the methods, techniques and generally-accepted practices of budgeting in the formulation, justification, presentation and execution of budgets; this includes (a) considerable skill in analyzing budget proposals/justifications and spending trends, assessing variances, reprogramming funds, and identifying budget options to support work programs and (b) knowledge of, and skill in using, budget management tools and systems of the organization, or ability to rapidly acquire or apply this knowledge and skill set.
- (2) Knowledge of key Commission work programs to thoroughly review budget submissions, track spending and identify trends, advise on budget options that support work programs at appropriate levels and prepare sound, complete and integrated analyses of budget matters\*.
- (3) Knowledge of government budget processes\*.
- (4) Knowledge of Commission organization, policies, and procedures (including budget processes, account codes, funding sources and other budget-specific information)\*.

*\*Typically acquired or fully developed primarily after employment in this job class.*

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- B. Considerable skill in problem solving to select, organize and logically process relevant information (verbal, numerical or abstract) to solve a problem. This includes skill in recognizing subtle aspects of problems and making recommendations and decisions. Examples include applying a wide variety of qualitative and quantitative measures to analyze budget information; developing economic assumptions for trending; paying close attention to detail; and performing environment scans to proactively identify, prepare for and respond to emerging budget management issues.
- C. Skill in communication to understand verbal and written information (including facts, assertions and arguments), draw inferences, form hypotheses and develop logical arguments, and to express such information so that others will understand and, in some situations, agree, comply or take other desired action(s). This includes skills in actively listening to ascertain key information, including perspectives, concerns, wants and needs of others, and in communicating effectively to obtain agreement, compliance or other desired results.
- D. Interpersonal skills to interact effectively with business contacts in a businesslike, customer service-oriented manner; this includes skill in establishing and maintaining effective working relationships and working as a member or a leader of a team.
- E. Skill in using a computer, modern office suite software, enterprise software and specialized software.

### Minimum Qualifications (MQs):

1. Bachelor's Degree in Finance, Accounting, Business Administration, Management, Public Administration or any related field.
2. Four years of progressively responsible budget analysis experience that includes substantive work in the range of duties and responsibilities in this class specification.
3. An equivalent combination of education and experience may be substituted, which together total 8 years.

### Working Conditions:

Works in an office setting; may work outdoors briefly on an incidental basis. Work is primarily sedentary and requires very light to light physical effort. May be subject to various job demands such as high volume of work and tight deadlines.