



City of Phoenix

Budget and Research Analyst

Job Code:	05600	Job Function:	Personnel and Budgeting
Salary Plan:	001	Grade:	039
FLSA:	Exempt	Labor Assign:	Non-Represented Groups
Benefit Cat:	007	EEO-4:	Professionals
SOC:	13-2031	Last Revision:	January 2023

This description shall not be held to exclude other duties not specifically mentioned that are of similar kind or level of difficulty as the examples of typical functions of the classification. They are intended to describe the general nature and level of work being performed by individuals assigned to positions in this classification.

DEFINITION:

The fundamental reason this class exists is to perform professional fiscal analysis and research duties for the Budget and Research Department in support of the preparation and administration of citywide capital and operating budgets.

DISTINGUISHING FEATURES OF THE CLASS:

This is the journey-level classification in the Budget and Research Analyst series. Positions at this level are distinguished by the performance of the full range of duties as assigned, working independently, and exercising judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. Work is normally reviewed upon completion and for overall results. This class is distinguished from the Senior Budget and Research Analyst in that the latter is responsible for the most complex work assigned to the series and/or provides technical and functional direction to lower-level professional classes.

SUPERVISION RECEIVED/GIVEN:

Receives general direction from assigned supervisory or management personnel.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only):

- Analyzes and reviews capital and/or operating expenditure and revenue budget requests from departments for accuracy and projects fund balance impact.
- Works collaboratively and effectively with City departments in the development of budgets, assisting with each stage of the budget development process.
- Assesses availability of funding, appropriation authority, and acceptability of the use of funds; recommends adjustments and discusses recommendations with management and department staff.



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- Reviews and approves budget and position control documents in accordance with relevant administrative regulations and availability of funding; resolves issues with departments.
- Assists in preparation of City budget documents, including the Inventory of Programs, Summary Budget and Detail Budget books, and Capital Improvement Program documents.
- Prepares and quantifies changes to the budget as they arise in the budget process.
- Performs system administration for budget and position control systems; maintains tables, data, internal controls, and security; performs electronic uploads/exports, updates, trouble shooting, and generates reports.
- Coordinates and conducts training on the budget process and budget system for city departments.
- Conducts independent research studies involving surveys, identifying best practices, producing cost-benefit analysis, and preparing written reports.
- Makes recommendations identifying improvements, cost savings and efficiencies for a diverse array of City programs and services.
- Conducts analysis and produces reports of personnel costs, and other costs as requested and provides costing support and analysis during the labor negotiation process.
- Completes short-term and long-term forecasts of revenues and expenditures and proposes changes to maximize forecasting accuracy .
- Gathers economic information and data on a routine basis and provide updates to management on the economy.

REQUIRED KNOWLEDGE AND ABILITIES:

Knowledge of:

- Methods, principles and practices of government finance, budgeting and accounting.
- Pertinent laws, codes, regulations, policies and procedures, and standards relevant to area(s) of assignment.
- Principles and practices of researching, analyzing, and interpreting fiscal and economic data and trends.
- Principles and practices of developing effective reports and presentations for a variety of audiences.
- Budgetary and financial software and systems.
- Data management and spreadsheet software.
- Techniques for providing a high level of customer service by effectively dealing with the public, City management and staff, elected officials, and vendors/contractors, as required.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.



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Ability to:

- Research, write reports, analyze and make effective recommendations from a city-wide perspective on budgetary and fiscal practices, procedures, and issues.
- Research, analyze, compile, and interpret statistical and other complex data.
- Write complex reports in a logical, comprehensive, concise manner.
- Prepare effective presentations on conclusions and recommendations.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Understand the organization and operation of the City and of outside agencies as necessary to assume assigned responsibilities.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Additional Requirements:

- Some positions require the use of personal or City vehicles on City business. Individuals must be physically capable of operating the vehicles safely, possess a valid driver's license and have an acceptable driving record.
- Use of a personal vehicle for City business will be prohibited if the employee is not authorized to drive a City vehicle or if the employee does not have personal insurance coverage.
- Appointments to some positions are subject to meeting appropriate background standards.

ACCEPTABLE EXPERIENCE AND TRAINING:

Bachelor's degree in economics, finance, accounting, statistics, or a related field and three years of professional-level experience in governmental budgetary and finance activities which included some experience analyzing and interpreting financial and economic data and trends.

Other combinations of experience and education which meet the minimum requirements may be substituted.