



City of Phoenix

Senior Budget and Research Analyst

Job Code:	05610	Job Function:	Personnel and Budgeting
Salary Plan:	001	Grade:	040
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 advanced 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 advanced-level classification in the Budget and Research Analyst series. Incumbents work under general direction and exercise a high level of discretion and independent judgment in performing the full range of routine to complex professional fiscal analysis and research duties.

SUPERVISION RECEIVED/GIVEN:

Receives general direction from assigned supervisory or management personnel.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only):

- Analyzes changes in operating or capital fund balances and prepares comprehensive reports on the financial condition of all operating and capital funds and recommends solutions to identified problems.
- Identifies fund condition and/or problems and recommends solutions.
- Evaluates citywide and departmental expenditure budget requests and makes necessary adjustments.
- Prepares and quantifies changes to the budget as they arise in the budget process.
- Develops all legal budget adoption schedules, ordinances and requests for Council Action in conformance with statutory requirements.
- Conducts comprehensive analysis of selected major revenue sources and prepares alternative revenue increase/decrease reports or recommended estimates.
- Conducts citywide analysis and review of debt estimates, proposed budget, and actual results.



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- Conducts research and prepares reports for required reporting or on special projects.
- Conducts analysis and produces reports of personnel costs and other costs as requested.
- Completes short-term and long-term forecasts of revenues and expenditures as needed.
- Participates in the labor costing process and completes labor costing as assigned.
- Participates, coordinates, prepares required analysis and reports for the quadrennial Expenditure Limit process required by the State of Arizona Constitution.
- Provides assistance with complex governmental accounting issues and recommends efficient and effective budget and accounting strategies.

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.

Ability to:

- Research, write reports, analyze and make effective recommendations from a city-wide perspective on budgetary and fiscal practices, procedures, and problems.
- Research, and compile 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.
- Effectively represent the department and the City in meetings with individuals; governmental agencies; community groups; various business, professional, and regulatory organizations.
- Learn and understand the organization and operation of the City and of outside agencies as necessary to assume assigned responsibilities.



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- 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 five years of professional-level experience developing and administering complex budgets in a government setting and researching and analyzing complex financial and economic data.

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