

**Town of Natick
Job Description**

Position Title:	BUDGET ANALYST Budget and Financial Analyst	Grade Level:	3
Department	Finance	FLSA Status	Exempt
Reports to:	Deputy Town Administrator/ Finance Director Director of Finance		

Statement of Duties:

Prepares and coordinates Town-wide budgets; administers budget performance systems; recommends financial policies and procedures; develops computerized financial reports; manages assigned operations; performs related work as required with a progressive customer service orientation.

Supervision Required: Reports to the Deputy Town Administrator/~~Finance Director~~ Director of Finance. Also receives support and supervision from the Assistant Finance Director.

Supervisory Responsibility: None.

Accountability: This position is highly accountable and incorrect actions or misjudgment would typically result in monetary loss, missed deadlines as well as legal repercussions, and adverse public relations.

Judgment: Individual judgment and the application of professional knowledge and experience is required in selecting the appropriate practices, procedures, regulations, or guidelines to apply in each case.

Complexity: This position ~~services Town government, which works in itself is municipal finance, a very demanding vocation.~~ As a Budget and Financial Analyst, the ~~many details of the complex, detailed and fast paced work~~ ~~calls~~ for close oversight and timing. Incumbent must rely, to a large extent, on ~~his/her~~ their ingenuity, training and talent in bringing about desired results.

Confidentiality: Individual judgment and the application of professional knowledge and experience is required in selecting the appropriate practices, procedures, regulations, or guidelines to apply in each case.

Work Environment: Physical demands are minimal in this work, but stress is present continuously in applying efforts for important functions of Town government. Meeting deadlines in all cases is very demanding. The work itself is of a sedentary nature, and the work environment is, for the most part, pleasant. After-hours meetings and work are required in this work on an intermittent basis, except during budget development and town meeting time, when the need to get necessary work completed is apt to be very demanding.

Nature and Purpose of Contacts: Primary contacts are with the Deputy Town Administrator/~~Finance Director~~ Director of Finance -for guidance on day-to-day matters as well as long range objectives. Other contacts are with the Assistant Finance Director, Town Administrator and other department heads for the purpose of preparing budgets.

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Occupational Risks: Risk exposure is similar to that found in a typical office setting.

Essential Functions:

The essential functions or duties listed below are intended only as illustrations of the various type of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related, or a logical assignment to the position.

1. Coordinates the preparation of Town-wide budgets; provides procedures, requirements, instructions and schedules for budget input and preparation; directs and implements modifications to budget, ~~position control and financial systems;~~ creates centralized budget with narratives & data visualization; participates in Town-wide budget forums, attends and provides information as necessary to the Select Board, Finance Committee and Town Meeting.
2. ~~Prepares~~ Collaborates with financial advisor to evaluate and coordinates compare bond structure and premium allocation; perform financial analysis for credit rating calls; and Prepare all finance-related materials for Municipal Bond/BAN Issuance.
3. Collaborates on capital projects with Deputy Town Administrator/Operations and department heads.
4. Compile and analyze Accounting Records from MUNIS ERP and other data to monitor revenue and expenditure YTD trend and produce quarterly report to the board and public.
- 2-5. Conduct financial indicator analyses and long-term financial forecasts for the town, replacement funds and enterprises, which incorporates final forecasting, incorporated with capital improvement projects.
1. ~~Prepares customized financial management reports; recommends corrective actions for resolution of budget performance issues.~~
6. Develop and maintain debt models for long-term projection of debt payment schedules & debt ratio analyses to assess the capacity and financial impact.
7. Monitor and present the general economic trends, and entire industries in written reports or visualized presentation.
8. Monitor grant funds expenditures and proposal update for Quarterly P&E compliance report to the federal government.
- 3-9. Develops and balances a ~~position control~~ personnel budgeting system that provides salary and benefit cost analysis information for all personnel; ~~incorporates position control into budget documents and projects impacts on the long term financial plan.~~
4. ~~Recommends changes to departmental policies and procedures, systems and standards; participates in organization, staffing and related management activities.~~

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~~5.10. Provides~~Maintain, manage and provide training in the use of ~~computerized financial systems and budget development procedures and system~~Budget Development & Debt Management systems.

~~2. Monitors financial data collection systems.~~

11. Costs out and otherwise provides analysis of budgetary impacts of collective bargaining proposals and agreements

~~6.12. Such other duties as may be~~ assigned by the ~~Finance Director~~Deputy Town Administrator/Director of Finance.

Recommended Minimum Qualifications:

Education and Experience: Any equivalent combination of education, training and experience which provides the required knowledge, skills and abilities to perform the essential functions of the job.

- Possession of a Bachelor's degree in public or business administration, accounting or a related field is required. A Master's degree in public or business administration, accounting or a related field is highly desirable.
- Experience: Five (~~35~~) years of increasingly responsible professional experience in finance, budgeting or accounting, including at least two (2) years of experience performing financial analysis.
- Experience in municipal finance is preferred.

Knowledge, Abilities and Skill

- Knowledge of the principles and practices of public sector budgeting, financial analysis and accounting; computerized financial systems, including MUNIS; principles and practices of public administration.
- Ability to communicate effectively with Town staff, the public and contractors, including preparing/presenting financial reports; ~~analyze complex and sensitive funding and performance issues and negotiate resolutions; understand, interpret~~

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~~and apply appropriate policies, regulations and procedures; establish and maintain cooperative relationships with those contacted in the course of work.~~

- Analyze complex and sensitive funding and performance issues and negotiate resolutions.
- Understand, interpret and apply appropriate policies, regulations and procedures.
- Establish and maintain cooperative relationships with those contacted in the course of work.

Physical and Mental Requirements

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the position's essential functions.

Physical Skills

- There is little or no physical demand needed. The ability is required to lift up to 30 pounds.

Motor Skills

- Duties require minimal motor skills other than those related to operating office equipment.

Visual Skills

- Ability to see and read

This job description does not constitute an employment agreement between the employer and the employee, and is subject to change by the employer, as the needs of the employer and requirements of the job change.