

**CITY OF FONTANA
BUDGET ANALYST I/II**

DEFINITION: Under direction and/or general supervision from higher level management staff, performs a variety of professional level duties and responsibilities involved in the evaluation, development, and review of City budgets; coordinate budget development activities with assigned City departments and staff; performs a variety of professional, analytical, financial, management, and/or other related duties as assigned.

DISTINGUISHING CHARACTERISTICS:

Budget Analyst I – This is the entry level class in the Budget Analyst series. This class is distinguished from the Budget Analyst II by the performance of the more routine tasks and duties assigned to positions within the series. Since this class is typically used as a training class, employees may have only limited or no directly related work experience. This position does not exercise oversight of clerical staff.

Budget Analyst II – This is the full journey level class within the Budget Analyst series. Employees within this class are distinguished from the Budget Analyst I by the performance of the full range of duties as assigned. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and fully aware of the operating procedures policies within the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the I level or when filled from the outside require prior work experience. This position may exercise functional and technical supervision over clerical staff.

ESSENTIAL FUNCTIONS: Duties may include, but are not limited to, the following:

- Provides support to the development of the annual budget, compiles budget workbooks, conducts analysis, and serves as a department liaison to city staff.
- Conducts analysis of budgetary issues across all City funds and makes recommendations for improvements or resolutions.
- Develops and reviews budget proposals for assigned departments and make recommendations to upper-level management staff.
- Participates in preparation, review, evaluation and monitoring of Capital Improvement Plans (CIP) and budgets; monitors and updates operating and capital budgets to reflect budget adjustments and funding changes; reviews CIP requests for financial technical compliance.
- Researches and answers financial and budget inquiries by staff, City management, citizens, other governmental agencies and the City Council.
- Prepares and processes general ledger transactions and adjustments to budget accounts following Council action; assists in the quarterly budget review process; and assists in reconciling year-end fund balance reports.
- Maintains assigned budget and financial databases and systems; problem solve and troubleshoot technical and functional issues related to the City's budget and financial systems.
- Establishes and maintains cooperative working relationships with those contacted in the course of work.

- Effectively communicate, both verbally and in writing, with a variety of audiences.
- Maintain prompt and regular attendance.
- Sound judgement and attention to detail.
- This position is always evolving. Therefore, employer reserves the right to modify this job description as necessary.

THE ABOVE LIST OF ESSENTIAL FUNCTIONS IS NOT EXHAUSTIVE AND MAY BE SUPPLEMENTED AS NECESSARY BY THE EMPLOYER.

WORKING CONDITIONS: Position requires prolonged sitting, standing, walking, reaching, twisting, turning, kneeling, bending, and stooping in the performance of daily activities. The position also requires grasping, repetitive hand movement and fine coordination in preparing reports using a computer keyboard. Additionally, the position requires near and far vision when preparing and reading written reports and other work related documents. Acute hearing is also required when providing phone and counter assistance. The need to lift, drag, and push files, computer reports, or other materials weighing up to 25 pounds is also required.

EXPERIENCE AND TRAINING GUIDELINES: A combination of experience and training that would likely provide the required knowledge and abilities is qualifying.

Budget Analyst I: The employee must have the knowledge of:

- Budget development, monitoring, and reporting principles and practices.
- Municipal government budgeting standards, financial practices, and applicable regulatory requirements.
- General accounting principles and practices.
- Automated financial systems.
- Methods of financial analysis.
- Methods and techniques of effective record keeping, report preparation, and presentation.
- Applicable federal, state, and local laws, codes, and regulations.
- Office procedures and modern office technology.
- Knowledge of relevant tools, software, and/or technology used within the role.
- Understanding of organizational policies, procedures, and best practices.
- Principles and practices of excellent customer service.
- Knowledge of safe work practices, OSHA regulations, and workplace health and safety procedures to ensure a safe working environment.

Ability to:

- Analyze and interpret financial and accounting reports.
- Analyze and resolve accounting and financial issues.
- Compile and review administrative and financial data, and make appropriate recommendations based on the analysis.
- Perform arithmetical computations with speed and accuracy.

- Identify issues, evaluate data, and implement effective solutions (problem solving).
- Effectively coordinate and facilitate the preparation of City budgets.
- Interpret, explain, and comply with applicable laws, rules and policies.
- Interact effectively with individuals from diverse backgrounds.
- Understand and follow both oral and written instructions accurately.
- Ability to work collaboratively with others in a team environment.
- Organize, schedule, and complete work in accordance with deadlines.
- Manage multiple priorities and meet deadlines.
- Use a personal computer, telephone, and other electronic devices to access information, complete documentation, and communicate effectively.
- Maintain prompt and regular attendance.
- Ability to perform tasks accurately and thoroughly, with a focus on quality.

Budget Analyst II: In addition to the qualifications for Budget Analyst I, knowledge of:

- Principles of economics, financial analysis, and cost-benefit analysis.
- Modern principles and practices of personnel administration.
- Principles and practices of training.

Ability to:

- Supervise, motivate, and train team members effectively.
- Make sound decisions in a timely manner.
- Manage and resolve conflicts or disagreements constructively.
- Perform administrative duties with minimal supervision.

Experience: Budget Analyst I – One (1) year of experience in the preparation and monitoring of budgets and/or in the areas of financial or budget analysis.

Budget Analyst II - Two (2) years of professional experience in the preparation and monitoring of budgets and/or in the areas of financial or budget analysis.

Education: A Bachelor's degree from an accredited college or university in finance, accounting, business administration, public administration, or a closely related field. Additional years of relevant experience may substitute for education on a year-for-year basis.

Licenses and/or Certifications: Possession of, and continuously through employment, a valid California Class "C" driver's license or equivalent.

SUPPLEMENTAL INFORMATION: Incumbents are required to complete a Statement of Economic Interest Form (700 Form) annually and ethics training bi-annually, pursuant to AB 1234.

Notes:

Budget Analyst I classification established 05/05/2025