

**\*\*\*ATTACHMENTS\*\*\***

**CITY OF SHEBOYGAN**

**REQUEST FOR SALARIES & GRIEVANCE COMMITTEE CONSIDERATION**

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**ITEM DESCRIPTION:** Possible ordinance identifying a new position of Budget Analyst, a change in the Table of Organization in the office of the City Administrator.

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**REPORT PREPARED BY:** Sandy Rohrick, Director of Human Resources & Labor Relations

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**REPORT DATE:** August 16, 2016

**MEETING DATE:** August 22, 2016

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**FISCAL SUMMARY:**

**STATUTORY REFERENCE:**

Budget Line Item: N/A  
Budget Summary: N/A  
Budgeted Expenditure: N/A  
Budgeted Revenue: N/A

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Wisconsin Statutes: N/A  
Municipal Code: Chapter 82

**BACKGROUND / ANALYSIS:**

On an annual basis, the City of Sheboygan is responsible for providing the citizens of Sheboygan a balanced budget. In an effort to streamline the budgeting process and improve transparency and consistency in practice, a recommendation is being presented to modify the Table of Organization in the Office of the City Administrator, adding a full-time Budget Analyst.

**STAFF COMMENTS:**

In today's increasingly dynamic business environment, the role of the financial team has evolved. To stay agile and keep pace with multiple priorities, many municipalities have elected to assign one "champion" to spearhead the budget process and its strategic plan-based performance analytics.

This person would report to the City Administrator and work with all departments in providing consistent, detailed information regarding the budget and related performance analytics. In addition, the successful candidate will be utilized to perform other non-financial projects, such as research and development, periodic surveys, grant applications and miscellaneous projects throughout the year. Based on an anticipated 2017 personnel turnover in the Finance Department, this position will result in no net additional position for the City.

**ACTION REQUESTED:**

Motion to recommend the City Attorney's office draft an ordinance that identifies a change in the Table of Organization for the Office of the City Administrator, adding the position of Budget Analyst.

**ATTACHMENTS:**

- I. Draft Budget Analyst Job Description.



## Job Description

<b>Job Title:</b>	<b>Budget Analyst</b>	<b>Department:</b>	City Administration		
<b>Date Issue:</b>	08/22/2016	<b>Reports To:</b>	City Administrator		
<b>FLSA Classification:</b>	Exempt	<b>Wage:</b>	Salary Grade 6		
			<b>Minimum</b>	<b>Midpoint</b>	<b>Maximum</b>
			\$41,872	\$52,340	\$62,808

## Position Summary

This is a highly technical position responsible for assisting and/or championing the development, design and implementation of performance measure budgeting. Work primarily involves managing the timely flow of the budgeting process, providing leadership and assisting departments with budgetary problems and concerns; developing, designing and monitoring performance measures; long range trend analysis; compiling and leading the efforts needed to prepare the yearly budget. Additional projects and/or assignments as needed, including projects unrelated to finance. The incumbent works under the general supervision of the City Administrator.

## Essential Duties & Responsibilities

1. Develops, presents, designs and implements performance measure budgeting in conformance with the long-range goal of the Strategic Fiscal Planning Committee. Develops, with Council and Department Heads, useful performance measures and assists in the assimilation of those measures into department operation. Monitors, maintains, analyzes, and modifies performance measures on an on-going basis to reflect the City of Sheboygan's experience in this area.
2. Performs research and development of various projects, reports, periodic surveys, grant applications, and miscellaneous projects as needed throughout City operations, both related and unrelated to finance.
3. In conjunction with the Director of Finance, develops the Annual Budget under the direction of the City Administrator.
4. Assists Department Heads in the identification and resolution of budgetary opportunities and concerns throughout the year.
5. Assists the City Administrator in the administration of all department budgets.
6. Provides and presents long range trend analysis and other reports to identify concern areas of spending and the basis for long-term policy decisions.
7. Analyzes revenue trends and identifies concern areas; identifies service areas which may be possibly revenue supportive, monitor existing rates and recommend rate changes to reflect current cost of services.
8. Maintains regular punctual and predictable attendance, works overtime and extra hours as required.
9. Calculates and presents budget adjustment areas such as wages and transfers following labor contract approvals.
10. Participates in the implementation and/or upgrades of MUNIS software system, particularly in integrating the account code structure with the budget categories and training of users.

### **Qualification Requirements:**

11. Meets with and presents budgeting and financial issues to public groups and individuals.
12. Friendly, positive, cooperative professional, able to work with internal and external employees, vendors, and citizens in a professional capacity.
13. Knowledge of principles and practices of accounting, budgeting and finance in municipalities.
14. Knowledge of rules and regulations of the Common Council relative to financial disbursements.
15. Knowledge of performance measure budgeting and analysis.
16. Ability to maintain financial records and accounts.
17. Ability to prepare financial reports.
18. Ability to close books and make necessary adjustments.
19. Ability to assist in various aspects of budget preparation.
20. Ability to work effectively under tight time constraints.
21. Ability to communicate effectively, both orally and in writing with individuals both inside and outside the organization.
22. Ability to perform various trend analysis, identify concerns and recommend long term solutions.
23. Professional-level knowledge of MSOffice products and the ability to work at a personal computer terminal for extended periods of time.
24. Ability to adapt to financial software products.

### **Education and/or Experience**

25. Bachelor's degree in Public Administration, Political Science, Accounting, Business or related field preferred.
26. Three to five years experience in budget development and analysis and general accounting, and/or any equivalent combination of experience and training which provides the equivalent education, knowledge, abilities and skills, preferably in the public sector.

### **Pre-employment Requirement**

27. Position is contingent on the individual passing a pre-employment drug screen.

The City of Sheboygan, Wisconsin is an Equal Opportunity Employer

In compliance with the Americans with Disabilities Act, the City of Sheboygan will provide reasonable accommodations to qualified individuals with disabilities and encourages both prospective and current employees to discuss potential accommodations with the employer.