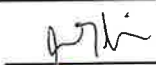



**Doña Ana County
JOB DESCRIPTION**

POSITION TITLE: BUDGET AND RESEARCH OFFICER		PAY GRADE: D62
DEPARTMENT: Financial Services	FLSA: <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	
REPORTS TO: Director of Financial Services	LEAD: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
BARGAINING UNIT: N/A	SUPERVISOR: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
<hr/>		
APPROVED: 		<u>6/3/21</u> <i>Date</i>
<i>Department Head</i>		
		<u>7/10/21</u> <i>Date</i>
<i>Human Resources Director</i>		

I. PURPOSE SUMMARY. Under the general direction of the Financial Services Director, the Budget Officer is responsible for analysing department submissions and to develop and formulate the County's operating and Capital Improvement budgets. Develops financial forecasts; performs research on special projects in support of the department and County Management; performs strategic planning and general research; and prepares short- and long-range financial plans and studies. Manages the grants section and is responsible for full range of activities for grant writing, submissions for new and existing projects, research to support proposals, grant compliance and administration.

II. ESSENTIAL DUTIES. (A position may not include all of the duties listed, nor do the listed examples include all of the duties which may be found in a position of the class. An individual must be able to perform the essential functions listed below and a reasonable accommodation may be made available to qualified individuals with disabilities to perform the essential functions of the job).

1. Analyzes, coordinates, and reviews annual budget submissions from departments.

- A. Ensures submissions are accurate and a true reflection of budget needs.
- B. Ensures submissions adhere to County Manager and Board of County Commission's (BOCC) instructions, and are in compliance with regulation, policy and procedure.
- C. Works closely with County department managers and budget liaisons to coordinate and advise; uses various software systems to obtain and provide budget and fiscal information and reports; integrates activities, and resolves problems in reconciling department budget submissions.
- D. Challenges and analyses budget assertions by heads of departments, and ensures compliance with budget instructions.
- E. Coordinates and communicates with Financial Services Department and County Management on the budget process.

- 2. Prepares and presents financial and budgetary information.**
 - A. Attends BOCC meetings and, if required, responds to inquiries from Commissioners or the public on budget-related issues.
 - B. Represents the County in public hearings, town hall meetings, public gatherings/meeting, and county meetings on financial and budgetary matters.
 - C. Prepares and makes budget presentations.

- 3. Participates in the preparation of the County Manager's recommended operating and capital improvement budgets, ensuring effective oversight and financial management.**
 - A. Monitors and analyzes expenditures, revenues and changes in financial status in complex funds and budgets on a County-wide basis.

- 4. Prepares routine monthly, quarterly, and annual reports.**
 - A. Tracks expenditures and analyzes variances and trends.
 - B. Analyzes revenues and prepares revenue reports.
 - C. Required budget submissions to NM Department of Finance and Administration

- 5. Functions as the contact point for executive staff for budget or assigned areas of responsibility.**
 - A. Prepares summaries and analyses of budget and management information.
 - B. Provides general research, non-routine reports and responses to special requests for financial and organizational performance studies including trend analyses.
 - C. Writes and reviews reports and provides recommendations on accuracy and clarity.

- 6. Oversees, coordinates and monitors assigned programs or projects.**
 - A. Performs cost analysis.
 - B. Develops performance benchmarks.
 - C. Sets financial targets.

- 7. Manages Position Budgets using a budget tracking software.**
 - A. Activates salary and fringe budgets for new positions
 - B. Maintains position budgets (salary and/or fringes)
 - C. Enters and maintains position labor distributions

- 8. Prepares training materials and delivers training to department and division budget liaisons on the County's budgetary and fiscal compliance means, methods, targets and goals.**

- 9. Manages the Grants section including oversight of grant submission, administration of grants, grant audit and reporting, establishing and ensuring internal controls and best practices. Oversees the research of grant and special projects**

opportunities in support of county departments and management. Develop and manage the grant section to meet the County's grant needs and related funding objectives.

10. Directly supervise and coordinate the activities of budget and grant staff. Specific tasks include but are not limited to:

- A. Direct, schedule and oversee work product and performance
- B. Enforce personnel rules and regulations, standards of conduct, work attendance, and safe work practices.
- C. Participate in selection processes, recommend hire, termination, counselling or discipline of subordinates.
- D. Appraise performance and review evaluations by subordinates.

III. ADDITIONAL DUTIES. Perform other job-related duties as required. May require travel to special training, conferences and meetings.

IV. QUALIFICATIONS.

A. Education. Bachelor's Degree in Accounting, Finance, Public or Business Administration or a closely-related field.

B. Experience. A minimum of five (5) years experience as a management or budget analyst performing analysis, budgeting and/or research activities. Government experience preferred. A Master's degree in Public Administration is preferred.

C. Education/Experience substitution. None.

D. Licenses/Certifications. Requires a valid Class D driver's license.

E. Other. Must pass a background check, credit report and driver's license record checks.

V. KNOWLEDGE, SKILLS, AND ABILITIES REQUIRED BY THE POSITION:

Knowledge of:

Advanced budget theory, principles and practices and their application to a variety of budgeting transactions and/or problems; computer literate with various software (i.e., spreadsheet and databases).

Skilled in:

Relating budgetary and management issues to external trends and administrative goals.

Applying comprehensive familiarity of countywide/departmental operations to complex issues and problems.

Goal and program-oriented budgeting, productivity analysis, and forecasting resource requirements.

General research planning process.

Dealing with and negotiating future fiscal year operating budgets, tracking actual spending and assisting in implementing fiscal controls.

Ability to:

Work long hours, especially during budget season.

Establish and maintain effective working relationships with officials, fellow departmental employees, employees of other departments, and achieve consensus through group processes.

Exercise a high degree of initiative and judgment, using only brief general direction, to analyze highly complex issues/problems, apply current research and statistical methods, formulate effective recommendations, and make presentations to department officials, Commissioners, and the public.

Effectively interact and communicate, both orally and in writing, with county and departmental officials, staff, and BOCC.

VI. FREEDOM TO ACT.

Work is performed under the general supervision of the Director, Financial Services. The supervisor sets overall objectives and resources available. The employee and supervisor, in consultation, develop deadlines, projects, and work to be done. The employee is responsible for planning and carrying out the assignment, resolving most of the conflicts that arise, coordinating the work with others as necessary, and interpreting policy on own initiative, in terms of established objectives. In some assignments, the employee also determines the approach to be taken and the methodology to be used. The employee keeps the supervisor informed of progress and potentially controversial matters. Completed work is reviewed only from an overall standpoint in terms of feasibility, compatibility with other work, or effectiveness in meeting requirements or expected results.

VII. GUIDELINES AND JUDGMENT.

Policies and precedents are available and stated in general terms. Guidelines for performing the work are of use but often times personal judgment is necessary in order to complete the tasks as instructed. The employee uses initiative and resourcefulness in deviating from traditional methods or researching trends and patterns to develop new methods, criteria, or proposed new policies

VIII. PHYSICAL DEMANDS.

The work is sedentary. The employee must be able to operate general office equipment, and must be able to move about the work environment. The employee will rarely lift and move up to fifteen (15) pounds. Specific vision requirements for this job are close and distance vision and the ability to adjust focus.

This position is extremely demanding and the hours may be long and tedious. The work is cyclical and requires schedule flexibility. Applicants should be willing to work evenings and some weekends when it is demanded.

IX. WORK ENVIRONMENT.

Essential duties are performed in an office environment with no notable adverse environmental conditions.

X. SUPERVISORY RESPONSIBILITY.

Work is performed under the general supervision of the Director of Financial Services. The position plans overall work objectives and establishes priorities consistent with broad goals and objectives; develops, modifies and approves work methods or procedures; coordinates diverse work activities; has full supervisory responsibilities for the budget and grants areas including recommending hiring, firing, promotions and completing performance evaluations.

XI. EMPLOYEE ACKNOWLEDGEMENT:

I have read my Job Description and understand my assigned responsibilities, and have been given a copy of this Job Description. I have also received a copy of the Personnel Policies and Procedures Handbook, and understand that I am responsible for reading and following all relevant policies and procedures outlined in it. I also certify by my signature below that I am able to perform the essential functions of this Job Description with or without reasonable accommodation.

Accepted by: _____
Employee _____ *Date*