

BUDGET AND PROCUREMENT ANALYST

Position Code: 3506

WC Code: 9410

FLSA Status: Non-exempt

Pay Grade: 355

Location: Finance Approval Date: 2023

General Statement of Duties

Performs professional and complex administrative work, is responsible for consolidating data for the presentation of budget and performance measures for the Town of Mooresville's annual budget and provides procurement support to meet the needs and requirements of the Town of Mooresville.

Distinguishing Features of the Class

An employee in this class performs professional level work in analyzing budgetary data, budgetary requests, and interpreting and applying budget guidelines along with conducting procurement and contracting activities. Work is performed in accordance with established municipal procedures, local ordinances, and North Carolina General Statutes. Work is performed under the direction of the Budget Manager.

Duties and Responsibilities

Assist with review and analysis of proposed budgeted expenditures; assist with budget preparation; assist with monitoring budget and expenditures; prepare and maintain budget spreadsheets, records, and files.

Assist with the review and analysis of the annual operating and capital budgets.

Prepare supporting budget documents including statistical data, budget amendments, budget transfers and other fiscal information.

Assist in the creation of high-quality budget documents for both the annual budget and the CIP.

Assist with estimating future revenues and expenditures.

Identify over-expenditures and work with responsible department or director to correct the issue.

Analyze current expenditures and revenues for patterns or potential problems.

Prepare and maintain budget spreadsheets, records, and files.

Plan and carry out budget procedures including monthly monitoring of department

expenditures and revenues and communicate monitoring status to management.

Compile and edit the Popular Annual Financial Report; and coordinate with the designer, printer, and communications department to complete publication of PAFR.

Verify legal advertisements, with the Town Clerk, for public hearings and public input meetings related to budget process and Board of Commissioners.

Update the fee schedules for the annual fee schedule adoption and compile Town Fee Schedule.

Collect and compile department performance measures.

Assist Purchasing Manager with Town-wide procurement functions including document retention, procurement forecast and reports and researching request for proposal samples.

Review purchase requisitions to ensure accuracy, compatibility, and consistency with procurement standards.

Post solicitations, quotes, addendums, and questions on Town website and other media. Review departmental solicitations and monitor procurement practices for compliance with policy goals.

Utilize appropriate software to conduct competitive processes and to collect and disseminate information to internal and external customers.

Gather and prepare documents like quotes, proposals and purchase terms and conditions from suppliers for Purchasing Manager to review.

Assist with year-end transfer and funds carry-over process.

Provide support for Budget Manager, Purchasing Manager, and Deputy Finance Director.

Performs other duties as required.

Recruitment and Selection Guidelines

Knowledge, Skills and Abilities

Comprehensive knowledge of North Carolina Statutes and of local ordinances governing municipal preparation and financial practices.

Comprehensive knowledge of the principals and practices of finance, budgeting, strategic planning and procurement.

Thorough knowledge of the functions and operations of municipal agencies.

Strong and proficient technology skills, especially Microsoft Excel, and be able to produce accurate and professional documents.

Ability to communicate complex ideas both, both orally and in writing.

Ability to analyze and develop budget projections.

Ability to develop and conduct technical training programs.

Ability to conduct detailed research and prepare reports and findings.

Ability to establish and maintain effective working relationships with others.

Physical Requirements

While performing the duties of this job, the employee is frequently required to reach with hands and arms, sit, talk, and hear. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator. This position involves sedentary work requiring the employee to exert up to 20 pounds of force occasionally; 10 pounds frequently and/or a negligible amount of force constantly to move objects.

Must possess the visual acuity to work with data and figures, handle accounting processes, operate a computer, and do extensive reading.

Minimum Education and Experience

Bachelor's Degree in accounting or business from an accredited college or university and two to five years of experience in public finance administration; or an equivalent combination of education and experience. (Ability to achieve Certified Local Government Budget Officer certification or Certified Local Government Purchasing Officer certification within five years).