

SENIOR FINANCIAL & BUDGET ANALYST JOB DESCRIPTION



JOB TITLE: Senior Financial & Budget Analyst	CLASSIFICATION: Professional	IMMEDIATE SUPERVISOR: Finance Director
PAY GRADE: 133	DEPT: 1300 Finance	STATUS: <u>FT</u> <u>PT</u> <u>EXEMPT</u> <u>NON-EXEMPT</u> <u>BARG UNIT</u> <u>NON-BARG UNIT</u>

JOB SUMMARY: Responsible for analyzing and monitoring financial, budgetary and purchasing data to support the operational needs of the Finance Department. Aids the Finance Director in budget development and oversight, procurement management and financial analysis projects, promoting fiscal accountability and operational efficiency.

SUPERVISION EXERCISED: None.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Develops budget packages for departments/divisions and reviews/refines budget submittals.
- Assists with the CIP budget development and conducts monthly reviews to ensure projects remain on track.
- Assists with the compilation and production of the annual budget book.
- Conducts monthly review of Village revenues and expenditures to ensure financial performance aligns with projections.
- Processes and maintains budget transfers and resolutions including posting to Village website as required.
- Maintains budget compliance as required by State of Florida Truth-in-Millage (TRIM) requirements.
- Assists departments with Village procurement, including but not limited to, obtaining quotes, purchase orders, requisitions, contract implementation all in accordance with the Village's purchasing ordinance, accounting policies and procedures, and Federal and State procurement policies related to grants.
- Reviews and approves all requisitions to ensure compliance with the purchasing ordinance, verifies proper documentation is obtained and confirms accurate recording of the requested product or service in the appropriate general ledger account.
- Prepares journal entries as needed.
- Assists with preparing and analyzing monthly financial reports.
- Maintains vendor management system including setting up vendors and ensuring compliance with State regulations such as e-Verify.
- Assists in year-end closing of financial records, audit schedules and preparation of ACFR.
- Prepares and reviews for submission state reports including but not limited to public depositors report, annual financial report, and local highway financial report.
- Analyzes current accounting data and program information to ensure compliance with governmental laws and regulations.
- Learns and provides backup for payroll and other finance roles as needed.

OTHER DUTIES

- Conducts various financial analysis projects under the direction of the Finance Director.
- Responds and is available for post emergency events as needed
- Performs other duties as assigned.

DESIRED MINIMUM QUALIFICATIONS:Education and Experience:

- Must have either a Bachelor's degree in public administration, accounting, finance or business administration or related field with two (2) years of experience or Associates Degree with four (4) years of experience.
- Experience should be progressive responsibilities in governmental accounting procedures and financial analysis or professional financial/accounting experience
- Any equivalent combination of education, training, certification, and/or relevant experience may be considered.

Knowledge, Skills and Abilities:

- Extensive knowledge of governmental accounting methods, maintenance of fiscal records and established procedures in a public agency.
- Knowledge of GAAP (generally accepted accounting principles), practices and methods of budget analysis and cost control.
- Knowledge of Government Accounting Standards Board (GASB) Codification of Government Accounting and Financial Reporting Standards.
- Advanced computer knowledge with Microsoft Office Suite (Excel, Word, Outlook) and familiarity with or ability to learn, enterprise-level accounting and document management systems including ERP, Laserfiche, payroll and other related software.
- Knowledge and understanding of Public Records Laws, Chapter 119 of the Florida Statutes.
- Excellent analytical, written and verbal skills.
- Working knowledge of audits.
- Ability to work independently, organize and schedule multiple projects, and meet deadlines.
- Ability to establish and maintain effective working relationships with supervisors and other employees.
- Ability to communicate effectively orally and in writing.
- Able to complete required FEMA/NIMS ICS training as required as well as ongoing training to remain up to date on required documents for claims submittal.

SPECIAL REQUIREMENTS:

- Valid Florida State driver's license, or ability to obtain one; No more than two (2) moving violations within the last 12 month period; No more than six (6) violation points on your license within the last 24 months.

PHYSICAL DEMANDS:

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 essential functions.

While performing the duties of this job, the employee is regularly required to stand, walk, sit, talk, hear, listen and use hands to manipulate, handle, feel or operate objects, tools, or controls, and reach with hands and arms. The employee is occasionally required to climb or balance, stoop, kneel, crouch, or crawl. The employee must regularly lift and/or move up to 10 pounds, and occasionally lift and/or move up to 30 pounds of dead weight with knees extended and bending from the waist down.

Specific vision abilities required by this job include close vision, distant vision, color vision, peripheral vision, depth perception, and ability to adjust focus. In addition, the employee must be able to rotate the neck frequently, extend hands/arms overhead, and turn fully from a fixed stance. Employee must be able to drive a Village vehicle.

TOOLS & EQUIPMENT USED:

Computer, printer, calculator, copier, scanner, telephone and other commonly used equipment related to position. Specific computer software such as Microsoft Office, Laserfiche, current ERP system, and other miscellaneous programs.

ENVIRONMENTAL CONDITIONS:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee rarely works in outside weather conditions, but may be asked on occasion to work events or special functions outside, and may be occasionally exposed to hot, wet and/or humid outside conditions, cooler outside temperatures, toxic or caustic chemicals inside and outside, such as cleaning chemicals, and uneven grounds such as grassy areas. The noise level in the work environment is generally quiet when in the office, but may be moderately noisy on busy days or when outside.

SELECTION GUIDELINES:

Formal application, evaluation of education, training and experience; criminal, DMV, and credit background check; oral interview and reference check; job related tests may be required. The Village of Royal Palm Beach is a Drug Free Workplace and an Equal Opportunity Employer.

The duties listed above are intended only as illustrations of the various types 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.

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

JOB DESCRIPTION HISTORY:

Created: 5/28/25; Revised 10/1/25