



## Job Description – Town Finance and Budget Analyst

Location: Whitestown, IN

Full/Part Time: Full Time

Regular/Temporary: Regular

Reports to: Town Manager

Wage (Hourly/Salary): \$50,000/Year

### **Job Purpose:**

The Town Finance and Budget Analyst position supports development, implementation and monitoring of the Town budget and Capital Improvement Program and performs various budget analyses in cooperation with the Town Clerk-Treasurer. The position works closely with the Town Manager and Department Leaders to perform a variety of research and analysis of budgetary issues and prepares reports of findings and recommendations. The analyst assists in the development and balancing of the town budget and capital improvement program and prepares fiscal impact statements. The position will provide technical assistance and training to departments concerning budget and accounting issues and will conduct ongoing monitoring of Town revenues and expenditures. The analyst will provide analysis of trends, culminating in periodic reports on the Town's financial performance and annual report on Town's financial condition.

### **Essential Duties and Responsibilities:**

*The following duties ARE NOT intended to serve as a comprehensive list of all duties performed by all employees in this classification, only a representative summary of the primary duties and responsibilities. Incumbent(s) may not be required to perform all duties listed and may be required to perform additional, position-specific duties.*

- Reviews budget proposals and funding requests

- Manages the P.O. and encumbrance process
- Conducts cost/benefit and other types of analyses
- Submits budget recommendations for approval or rejection of funding requests
- Explains and defend recommendations to Department Leaders and Town Council
- Collaborates with Town Management and Town Council to develop final budget
- Ensures the organization's budget adheres to legal regulations
- Oversees expenditures and identify trends in spending
- Recommends Additional Appropriations when necessary
- Makes forecasts for future budget needs
- Works with Town Management and Clerk-Treasurer to ensure internal controls are being followed and updated when necessary
- Works as the Clerk-Treasurer's second set of eyes to verify that State Board of Accounts rules and regulations are being followed
- Prepares periodical and special reports
- Research current compensation trends
- Review/Code/Obtain Approval and complete the A/P Vouchers for following departments Town Administration, Fire, Building, Planning, Facility Maintenance, and Public Relations Departments
- Work collectively with the department heads to monitor their budgets and provide analysis as needed or requested.
- Work collectively with department heads when an additional appropriation/transfer of appropriation/internal transfer of appropriation is needed.
- Main point of contact for Reedy Financial Group about what is needed should a public notice have to go out
- Draft additional appropriation ordinances and update Town Manager about when this will be presented to Council
- Work with the Clerk-Treasurer's office on concerns/questions about a department's budget
- Assist and draft the upcoming year's budget working directly with each department head, Town Manager and various associates with Reedy Financial Group.
- Enter all new Funds and lines in accounting software as needed per Reedy Financial Group or when an ordinance for a new fund is created.
- Review internal management report and Reedy Financial Group's management report to ensure accuracy.
- Work directly with Town Attorney's, Reedy Financial Group and Town Manager to process bond disbursements, track and report on all project funds/construction accounts for bonds issued for the Town/RDA/RDC/etc.
- Attends and takes minutes for RDC and assists Legal with items needed.
- Attends and takes minutes for EDC and assists Legal with items needed.
- Attends and takes minutes for EIB and assists Legal with items needed.
- Performs other duties as required by the Economic Development Director

### **Education, Knowledge, and Skills:**

- Bachelor's Degree in Accounting, Finance, Business Administration, Public Administration or closely related field.
- Two years professional level experience in budget or accounting (Equivalent combination of education and experience may substitute)
- Knowledge of financial management principles and municipal budgeting practices.
- Knowledge of governmental fund accounting principles and practices and financial reporting standards.
- Advanced skill in the use of spreadsheet software and related graphic capabilities.
- Ability to develop charts, graphs, and other explanatory materials as needed.
- Knowledge of database and report-writing software.

- Ability to communicate complex financial information verbally and in writing

**Physical Demands/Work Environment:**

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.

The incumbent must be able to:

- The employee is required to stand, walk, sit, speak and hear, use hands to operate equipment and lift record books. Vision requirements include the ability to read and analyze documents and use a computer.

