



TOWN OF SURFSIDE BUDGET OFFICER

DEPARTMENT: FINANCE SUPPORT SERVICES

EXEMPT

GENERAL DESCRIPTION:

This is an advanced professional financial position with responsibility for all aspects of Town wide, multi-fund annual budget development, implementation, monitoring and modification from initial consultation with the Finance Support Services Director and Town Manager regarding budget kick-off and Town Commission objectives through the annual financial close out with the external auditor. Additional responsibilities include annual development of a 5 year financial forecast, coordination of Town grants and reporting, budget to actual reporting, revenue development, policy development, advanced analytic and policy development support to all Town Departments, assistance in contract negotiations and other related work as assigned. The incumbent will demonstrate and exercise considerable initiative, judgment, and professional knowledge and experience in fiscal, budgetary, and general public policy management analysis. Work is performed under the administrative direction of the Finance Support Services Director.

ESSENTIAL JOB FUNCTIONS:

1. Consults with Finance Support Services Director and Town Manager to assure that all policy direction and Town Commission objectives are addressed as well as possible in budgetary resource allocations.
2. Assembles budget manual, calendar, and budget parameters for presentation to all departments during Town-wide kickoff.
3. Reviews proposed departmental work plans and budget requests upon receipt and recommends funding necessary to provide various levels of service.
4. Compiles Town-wide proposed budget document for presentation to the Town Manager and Town Commission. Drafts multiple allocation center budgets as well as the transmittal Letter, personnel expenses, general liability and life and health insurance.
5. Develops and presents written and oral presentations for the Town Commission and others as needed to ensure transparency in the budget development process.
6. Ensures budgetary and operational compliance with all grant, foundation, special revenue, State of Florida, Miami-Dade County, Town of Surfside Charter, Interlocal Agreement, debt service covenants, independent contractors, bargaining unit and all other regulatory and/or contractual obligations.
7. Monitors Legislation and other requirement changes and proposes appropriate response.
8. Participates and presents in budget hearings held in Commission chambers to modify proposed budget, adopt tentative budget and adopt final budget and oversees the inclusion of the final adopted budget in the automated financial software system.
9. Monitors General, Enterprise, Special Revenue and Capital Projects Fund revenues, expenditures and budget transfers through the automated financial software system and generates and provides reports on same monthly, quarterly and annually.
10. Frequently reads and interprets large volumes of written materials, financial data, technical materials, Federal, State, County and Town statutes, rules and ordinances.
11. Reviews budget transfers
12. Prepares agenda items and presentations for the Town Commission.

13. Conducts operational audits/productivity reviews of Departments and Divisions to improve productivity and refine departmental objectives while assisting with performance measurement development, calculation and reporting.
14. May participate in contract negotiations for bargaining unit and provide alternative fiscal impact scenarios for the short term (annual) and long-term (5 year) fiscal programs.
15. Annually develops a 5 Year Capital Projects Program as well as a 5 Year Financial Forecast and Spending Plan for presentation to the Town Commission.
16. Addresses all administrative issues related to budget management: budget-to-actual budget analysis, budget entry, budget transfer approvals, budget reporting and annual audit schedule development
17. Assists in the development and preparation of the Management Discussion and Analysis (MD&A) as well as spreadsheets or exhibits, as needed, for the issuance of the Comprehensive Annual Financial Report (CAFR).
18. Coordinates budget training for all elected officials, accountants, department heads and administrative assistants as needed along with addressing concerns of individual residents/property owners, governmental boards and (when appropriate) media outlets as well as being responsible for development of press releases and/or other items related to the budget for website posting or other applications.
19. Identifies and addresses new sources of revenue and expenditure reduction.
20. Strong computer skills and ability to make presentations as needed.
21. Performs Special Projects and related work, as assigned.

(These essential job functions are not to be construed as a complete statement of all duties performed. Employees will be required to perform other job related marginal duties as required.)

MINIMUM QUALIFICATIONS:

KNOWLEDGE, ABILITIES AND SKILLS:

- Graduation from an accredited college or university with a degree in Finance, Accounting, Public Administration, Business Administration or equivalent. Masters Degree preferred.
- A minimum of five (5) years experience in the preparation and implementation of local government budgets required, experience with Florida Truth in Millage (TRIM) and at least three years State of Florida experience preferred.
- Experience in productivity analysis, performance management, and budgeting processes; experience with strategic planning and strategic management preferred.
- Experience and familiarity with financial management systems.
- Skill in communicating and expressing ideas clearly and concisely, both orally and in writing. Considerable knowledge of the principals and practice of governmental accounting / budgeting management and analysis. Familiarity with Florida Chart of Accounts Preferred.
- Demonstrated Ability to operate basic office equipment and maintain various software applications and mainframe financial software packages.
- Executive level interpersonal, leadership, planning, management and communications skills; ability to communicate professionally verbally, in writing, and in presentations with a customer service friendly approach.
- Ability to interpret rules, regulations, contracts, law and policies for effective decision-making.
- Skill in converting complex analysis and complex concepts into easily understood concepts and implications.
- Demonstrated statistical skills in research, compilation, and summarization of statistical data and information materials.

- Demonstrated ability to train personnel.
- Ability to write speeches, presentations, articles for publication that conform to prescribed style and format as well as the ability to communicate effectively with all levels of management and resident.
- Ability to be self-directed and set priorities among multiple and often competing deadlines.
- Ability to remain calm in stressful situations.
- Good customer service skills

EDUCATION AND EXPERIENCE:

Bachelor's degree in Finance, Accounting, Business, Public Administration, Civil Engineering, or related field preferred; Master's Degree Preferred. Five (5) to seven (7) years experience in municipal budgeting or any acceptable combination of education and experience. Each year of post-bachelor work to count as one year of experience.

LICENSES, CERTIFICATIONS OR REGISTRATIONS:

None required.

ENVIRONMENTAL CONDITIONS:

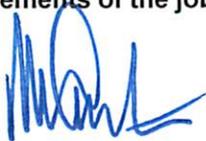
- Works in an office environment and occasionally outside to access street level / field practices/performance.
- Frequently required to see, hear, and talk with employees and the public, Town Manager and Town Commission.
- On occasion required to climb or balance, stoop, kneel, crouch, taste or smell.

(Reasonable accommodations will be made for otherwise qualified individuals with a disability.)

Revision History: New: 9/13/2011; 4/10/12

This job description does not constitute an employment agreement between the Town of Surfside and the employee. It is used as a guide for personnel actions and is subject to change by the Town as the needs of the Town and requirements of the job change.

Approved:

Town Manager's Signature:  _____