

Operating Budget Analyst – Financial Services

About the Financial Services' Budget Team, Business Services Bureau

The Budget Team is responsible for the preparation, implementation, and revision of the SFPUC's \$1.8B annual operating budget and multi-billion capital budget. Additionally, the review and distribution of detailed and complex financial analyses and management reports that provide information on status of budget/expenditures, appropriations, fund source/availability and projected revenues and expenditures. Utilizes multiple financial and budgetary systems, including data extraction and reporting functionality used for daily oversight of the SFPUC operating and capital budgets throughout the year.

Position: 1823 Operating Budget Analyst

The Budget Analyst is a key member of SFPUC's Budget Team, responsible for managing the operating budget for the Enterprises and/or Bureaus. Under general direction, the position will assist the department in developing, analyzing, and executing its biennial operating budget; review budget proposals and provide detailed analyses for accuracy; and ensure compliance with the SFPUC and the City's financial policies. The position will be charged with monitoring the department's budget throughout the fiscal year, analyzing expenditures and making recommendations; preparing quarterly variance reports for management and Commission; serve as SFPUC's liaison with the Controller's BAD and AOSD staff on financial matters impacting the department. The position will also take leadership of special projects, conducting detailed analyses of financial data and make financial policy recommendations.

Duties and responsibilities:

- Under general direction of the Budget Director and Operating Budget Manager, the Budget Analyst will assist in the development, detailed analyses, and implementation of SFPUC's biennial operating budget. The Budget Analyst will review budget proposals, make recommendations, and assist with presenting proposed budgets to key stakeholders including the SFPUC executive team and Commission.
- Monitor the department's detailed and complex budget throughout the fiscal year, ensures expenditures remain within budget, troubleshoot problems, and make recommendations. The Budget Analyst will prepare high level quarterly variance reports, analyzing trends in budget expenditures and revenues for management, the Commission, and various stakeholders.
- Be the liaison for SFPUC departments and with the Controller's BAD and AOSD staff, proactively engaging and collaborating to effectively manage budget issues throughout the year.

- Takes initiative and leadership, owning complex projects, conducts detailed analyses of financial data.
- Researches, analyzes and makes policy recommendations on special projects.
- Is a proactive team member, able to collaborate with and provide guidance to others, supporting informed decision-making across the agency.
- Communicate complex financial information in a clear manner, ensuring accuracy to multiple stakeholders. Presents information both verbally and through written reports/memorandums in a straightforward and concise manner.
- Assists the Capital Budget Team with detailed analyses and support in the preparation and submittal of SFPUC Supplemental Appropriation requests as part of the Two-Year Capital budget.
- Assist in the development of the SFPUC Biennial Budget Book as well as the SFPUC Budget Detail Reports.
- Process budget reallocation and surplus transfer requests, coordinating with departments, the Operating Budget Manager and SFPUC Accounting.
- Uses multiple financial and budgetary systems, including data extraction and reporting functionality. Has experience with financial software, such as with the City's PeopleSoft and Budget Formulation & Management (BFM) systems.
- Other complex financial or operational activities assignments as needed by the Budget Director and Operating Budget Manager.

Special Condition: two years EXP020 - Budget Analysis Professional Experience

Desirable Qualifications:

- Experience in the following areas of budget analysis: development of policy and instructions, preparation of background material for presentation to upper management, performing budget variance analysis for a large organization and developing recommendations based on analysis.
- Experience with PeopleSoft Financials, Business Intelligence, BFM or other financial software for a large organization.
- Microsoft Excel experience performing complex functions of a financial and budget nature.