



TOWN OF SURFSIDE BUDGET OFFICER

DEPARTMENT: FINANCE

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. Additional responsibilities include development of a 5-year financial forecast, coordination of Town grants and reporting, budget to actual reporting, revenue development, advanced analytic and policy development support to all Town Departments, assistance in contract negotiations as requested, 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 direction of the Assistant Town Manager / Chief Financial Officer.

ESSENTIAL JOB FUNCTIONS:

1. Consults with Assistant Town Manager / Chief Financial Officer to assure that all policy direction and Town Commission objectives are addressed as well as possible in budgetary resource allocations.
2. Preparation and management of annual budget including developing budget calendar, agenda items, presentations, application for GFOA Distinguished Budget Presentation Award, and other documentation as needed.
 - a. Assembles budget manual, calendar, and budget parameters for presentation to all departments during Town-wide kickoff.
 - b. Reviews and assists all departments in preparing budgetary requests and documentation including funding source.
 - c. Compiles Town-wide proposed budget document for presentation to the Town Manager and Town Commission. Drafts multiple allocation center budgets as well as any other documentation as directed.
 - d. Develops and presents written and oral presentations for the Town Commission and others as needed to ensure transparency in the budget development and management process.
3. Prepares, as needed, budget amendments for Commission consideration.
4. Manages financial management system's budget module and any others as directed and ensures budgets are loaded.
5. Reviews and recommends issuance of purchase orders as directed.
6. Reviews and approves invoices for payments as directed.
7. Ensures budgetary and operational compliance with all agreements, rules, laws/statutes, Town code/charter, including website updates as directed.

8. Monitors Legislation and other requirement changes and proposes appropriate response.
9. Reviews and recommends budget transfers/contingency releases through the financial software system and generates and provides reports as directed.
10. Frequently reads and interprets large volumes of written materials, financial data, technical materials, Federal, State, County and Town statutes, rules and ordinances.
11. Conducts, as directed, operational audits/productivity reviews of Departments and Divisions to improve productivity and refine departmental objectives while assisting with performance measurement development, calculation and reporting.
12. Participate, as needed, in contract negotiations for bargaining unit and provide alternative fiscal impact scenarios for the short term (annual) and long-term (5 year) fiscal programs.
13. Assists in the development of the Five (5) Year Capital Projects Program and a Five (5) Year Financial Forecast.
14. Assists in the preparation of the Comprehensive Annual Financial Report (CAFR) including but not limited to work papers for fund balance, reserves, developer contributions, and others as directed.
15. Coordinates budget training for staff and others as directed
16. Monitors revenues and expenditures and recommends new sources of revenue and expenditure reductions
17. 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:

- 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.
- 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. 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. Knowledge of Tyler Incode Financial Management System – desirable

(A comparable amount of training, education or experience can be substituted for the minimum qualifications.)

LICENSES, CERTIFICATIONS OR REGISTRATIONS:

- Certified Government Finance Officer (CGFO), and/or Certified Public Finance Officer (CPFO) is desirable

ESSENTIAL PHYSICAL SKILLS:

- Acceptable eyesight (with or without correction).
- Acceptable hearing (with or without hearing aid).
- Ability to access, input and retrieve information from a computer.
- Ability to communicate effectively both orally and in writing.
- Ability to access file cabinets for filing and retrieval of data.

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; 4/10/2012; 9/19/2019; 12/28/20

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: 