



NORTHWEST FIRE DISTRICT

BUDGET AND FINANCE ANALYST

Reports to:	Business Services Director	FLSA:	Exempt
Division:	Finance	Status:	Full-Time
Location:	Administration	2015 Pay Plan:	Gr. 90
Reviewed:	K. Sotomayor	2020 Pay Plan:	Gr. 20-90
	Business Services Director	Revised:	01/2021
Supervises:	None		

The statements below are intended to describe the general nature and level of work being performed by employees assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the position change and does not represent in any way a contract of employment.

POSITION SUMMARY

The Budget and Financial Analyst supports Northwest Fire District in its mission to save lives, protect property, and care for our community through assisting in the performance of a variety of professional level, administrative and analytical work, involving the preparation, monitoring, and analysis of District budgets and finances. The employee is expected to comply with the rules, policies, and procedures as set forth by the District, and to perform other related duties as assigned.

ESSENTIAL FUNCTIONS

- Assist in developing and maintaining short-term and multi-year forecasting models and related assumptions and data involving revenue and expenditure forecast analysis.
- Coordinates and assists with the preparation and administration of the District capital improvement program, debt management plan, and annual financial reports.
- Design and conduct surveys, economic impact studies, and prepare proposals on financial and staffing requirements.
- Design, develop and perform various independent statistical and research studies to monitor economic developments affecting the budget.
- Develop, monitor, and report key performance measurement/benchmarking pertaining to strategic goals and evaluate trends.
- Monitor District budget patterns and prepare and distribute budget reviews.
- Participate in annual operating, capital and District budget preparation and administration;
- Perform the costing of memorandum of understanding agreements.
- Prepare and present formal and informal instruction to personnel.
- Prepare detailed financial analyses including but not limited to financial impacts related to grant applications, meet/confer proposals, expansion projects
- Research economic trends at national, regional, state and local levels.
- Serve as backup for general accounting functions including but not limited to accounts payable, payroll, and accounts receivable.
- Trains, consults, and advises management, departments, and divisions regarding policies, and procedures, for budget preparation, and maintaining proper budgetary controls.
- Utilize principles of cost accounting to monitor and update District fee schedules.

- Write clear, complete and accurate reports from analysis of research or investigation.

Knowledge:

Basic

- Customer and Personal Service — Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.
- English Language — Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
- Public Safety and Security — Knowledge of relevant equipment, policies, procedures, and strategies to promote effective local, state, or national security operations for the protection of people, data, property, and institutions.

Specific

- Generally Accepted Accounting Principles for governments.
- Methods and techniques of analysis and investigation.
- Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases; automated business computing systems.
- Pertinent federal, state, and local laws, codes and regulations.
- Principles and methods of cost accounting.
- Principles and practices of financial record keeping, control and reporting.
- Principles and practices of fund accounting.
- Principles and practices of workflow and systems analysis.
- Principles of business letter writing and report preparation.
- Principles of practices of municipal budget preparation and administration.
- Theory of governmental accounting, including cash, accrual and modified accrual bases of accounting.

Skills:

Basic

- Active Learning — Understanding the implications of new information for both current and future problem-solving and decision-making.
- Critical Thinking — Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Judgment and Decision Making — Considering the relative costs and benefits of potential actions to choose the most appropriate one.
- Reading Comprehension — Understanding written sentences and paragraphs in work related documents.
- Speaking — Talking to others to convey information effectively.

Specific

- Analytical Skills - Mathematics, research design and methodology, and statistical analysis as they apply to budgetary control, financial management, and research projects.
- Work Product - Perform tasks with a high degree of accuracy, attention to detail, take initiative and organize responsibilities without observant supervision, and take independent action to work problems.

Abilities:

Basic

- Deductive Reasoning — The ability to apply general rules to specific problems to produce answers that make sense.
- Fluency of Ideas — The ability to come up with a number of ideas about a topic (the number of ideas is important, not their quality, correctness, or creativity).

- Inductive Reasoning — The ability to combine pieces of information to form general rules or conclusions (includes finding a relationship among seemingly unrelated events).
- Information Ordering — The ability to arrange things or actions in a certain order or pattern according to a specific rule or set of rules (e.g., patterns of numbers, letters, words, pictures, mathematical operations).
- Oral Comprehension — The ability to listen to and understand information and ideas presented through spoken words and sentences.
- Oral Expression — The ability to communicate information and ideas in speaking so others will understand.
- Originality — The ability to come up with unusual or clever ideas about a given topic or situation, or to develop creative ways to solve a problem.
- Problem Sensitivity — The ability to tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem.
- Selective Attention — The ability to concentrate on a task over a period of time without being distracted.
- Speech Clarity — The ability to speak clearly so others can understand you.
- Speech Recognition — The ability to identify and understand the speech of another person.
- Written Comprehension — The ability to read and understand information and ideas presented in writing.
- Written Expression — The ability to communicate information and ideas in writing so others will understand.

Specific

- Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
- Analyze systems and procedures accurately and logically and implement improvements.
- Establish and maintain effective working relationships by working cooperatively with others.
- Maintain sustained attention to detail, prioritize workload, manage multiple tasks with competing deadlines.
- Operate a variety of standard office equipment requiring continuous or repetitive arm- hand movements such as a calculator or computer keyboard.
- Prepare and administer budgets.
- Use good judgment and make difficult, independent decisions without direct supervision.
- Work safely and courteously to promote a strong team atmosphere.
- Work under pressure, handle significant problems and tasks that arise simultaneously and/or unexpectedly.
- Perform cross-training within work environment.
- Engage in self-improvement and training as required.

MINIMUM EDUCATION, EXPERIENCE AND TRAINING

- Bachelor's Degree from an accredited college or university recognized by the U.S. Department of Education in Accounting, Finance, Statistics and Research, Economics, or related field.
- Three (3) years of full-time, professional experience in budget, finance, economics, management analysis, or accounting work demonstrating increasingly responsible budget and finance experience in government.
- General working knowledge of MS Office Products. Advanced MS Excel Skills.

OR

- Any equivalent combination of education, experience and training which provides the required knowledge, skills and abilities to perform the essential functions of this position may be considered.

PREFERRED

- ERP experience

ADDITIONAL REQUIREMENTS (see “Definitions” for underlined word(s))

Driving Position:

This position requires possession of a valid driver’s license with an acceptable driving record for the pre-employment background check process.

Based on Arizona State Law, upon the date of hire and throughout the period of employment, the employee must present and possess a valid Arizona Driver’s License and maintain an acceptable driving record, see [Obtaining a Driver's License](#).

Definitions

1. Acceptable Driving Record: means that the driving record of the employee and/or volunteer has 3 points or less for the previous 12 months, or 16 points or less for the previous 36 months (as defined by the Department of Transportation, Motor Vehicle Division (MVD) see [Points Assessment](#).)
2. Driving Position: means a job which requires operating a vehicle on District business or operating a District vehicle as part of its range of duties, which may be primary or secondary within the range of duties.
3. Valid: means that an individual’s current driver’s license is not expired, refused, cancelled, revoked, suspended, or restricted.

Driving Level: Standard of Operating Guidelines Section – 2304 Staff Vehicle Use and Reimbursement, Category C

- Employees in this category periodically require the use of a vehicle for department business. In these circumstances, individuals will have the choice of utilizing a pool vehicle or receiving mileage reimbursement at the IRS Standard Mileage Rate for usage of their own vehicle
- Employees in this category may not take the pool vehicle home or use for personal business. There is no option for a vehicle allowance or stipend.

Driver’s License Type:

Operator License (Class D) reference [Driver License Classes and Types](#). An operator license allows you to drive any vehicle that does not require a motorcycle or commercial driver’s license. You must be at least 18 years of age to apply for an operator license.

Commercial Driver’s License (CDL Endorsements): None

Automobile Insurance Requirement (Refer to District Policy 5.4 Driver’s License)

Employees who drive their personal vehicles for District business are required to have and maintain their current automobile insurance upon the date of hire and on an on-going basis.

Safety Sensitive Position: (Refer to District Policy 5.2 Drug and Alcohol Testing)

Pre-employment Drug Testing Required: Yes

Physical Activity	Definition	Never	Occasionally (activity or conditions exist 0-2.5 hrs./day)	Frequently (activity or conditions exist 2.5-5.5 hrs./day)	Constantly (activity or conditions exist 5.5+ hrs./day)
Repetitive Motion	Repeating movements of arms, hands, wrists, fingers				X
Talk	Express or exchange ideas verbally			X	
Hear	Perceive sound by ear				X
See	Obtain impressions through the eye				X
Kneel	Bend legs at knee, come to rest on knees		X		
Crouch/Squat	Bend body down and forward, bending legs and spine		X		
Crawl	Move on hands, knees, and feet		X		
Climb	Ascend/descend ladders, stairs, ramps		X		
Sit	Sit				X
Stand	Stand			X	
Walk	Move about on foot; average distance per shift 3-5 miles		X		
Bend/Stoop	Bend downward and forward by bending spine at waist		X		
Lift	Raise or lower object > 10 lbs. from one level to another		X		
Lift	Raise or lower object > 25 lbs. from one level to another		X		
Carry	Transport an object		X		
Push	Press with steady force, thrust objects forward, downward, outward		X		
Pull	Drag or tug objects		X		
Turn/Twist	Move a body part in circular motion		X		
Balance	Exceeding ordinary body equilibrium		X		
Reach	Extend hands and arms in any direction			X	
Handle	Seize, hold, turn with hands			X	
Distinguish Color	Ability to distinguish color		X		
Fingering	Picking, pinching, typing, or otherwise with fingers rather than whole hand				X
Grasping	Applying pressure to an object with the fingers and palm				X
Feeling	Perceiving attributes of objects, such as size, shape, temperature, or texture	X			
Mental / Cognitive Activity	Definition	Never	Occasionally (activity or conditions exist 0-2.5 hrs./day)	Frequently (activity or conditions exist 2.5-5.5 hrs./day)	Constantly (activity or conditions exist 5.5+ hrs./day)
Communication	Comprehend and use basic language, either written or spoken, to communicate information and ideas				X
	Comprehend and use technical or professional language, either written or spoken, to communicate complex ideas				X
Calculation	Perform numerical operations using basic counting, adding, subtracting, multiplying, or dividing				X
	Perform complex quantitative calculations or reasoning using algebra, geometry, statistics, or abstract symbols				X
Problem Solving	Formulate and apply appropriate course of action for routine or familiar situations				X
	Use logic to define problem, collect information, establish facts, draw valid conclusions, interpret information and deal with abstract variables for unique or unfamiliar situations				X

Environmental Conditions	Definition	Never	Occasionally (activity or onditions exist 0-2.5 hrs./day)	Frequently (activity or onditions exist 2.5-5.5 hrs./day)	Constantly (activity or onditions exist 5.5+ hrs./day)
Weather And Temperature	Protection from weather conditions but not necessarily from temperature changes	X			
	Subject to outside environmental conditions – no effective protection from weather	X			
	Activities occur inside and outside	X			
	Subject to extreme cold (typically below 32°)	X			
Atmospheric Conditions	Subject to extreme heat (typically above 100°)	X			
	One or more of the following conditions that affect the respiratory system of the skin: fumes, odors, dusts, mists, gases, or poor ventilation	X			
	Worker is required to wear a respirator	X			
Noise	Sufficient noise to cause the worker to shout in order to be heard above the ambient noise level	X			
Vibration	Exposure to oscillating movements of the extremities or whole body	X			
Hazards	Proximity to moving mechanical parts, moving vehicles, electrical current	X			
	Working on scaffolding and high places	X			
	Exposure to chemicals	X			
	Exposure to oils: air and/or skin exposure to oils and other cutting fluids	X			
	Worker is required to function in narrow aisles or passage ways	X			
	Worker is exposed to infectious diseases	X			
	Worker is required to function around prisoners or mental patients	X			

Physical Requirements Checklist

- SEDENTARY**
 - Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull, or otherwise move objects, including the human body.
 - Sitting most of the time.
- LIGHT**
 - Exerting up to 20 pounds of force occasionally and/or a negligible amount of force constantly to move objects.
 - Use of arm and/or leg controls requiring greater exertion of force than for sedentary work, and worker sits most of the time.
- MEDIUM**
 - Exerting up to 50 pounds of force occasionally and/or up to 20 pounds of force frequently, and/or up to 10 pounds of force constantly to move objects.
- HEAVY**
 - Exerting up to 100 pounds of force occasionally and/or up to 50 pounds of force frequently, and/or up to 20 pounds of force constantly to move objects.
- VERY HEAVY**
 - Exerting in excess of 100 pounds of force occasionally, and/or in excess of 50 pounds of force constantly to move objects.