



POSITION DESCRIPTION

JOB TITLE: Budget Analyst (OHC) Job Class: 1120	
DATE	Office of Human Capital Benefits and Compensation
BARGAINING UNIT:	FLSA STATUS: <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non exempt
Pay Schedule: Pay Range:	Management Approval:
<p>POSITION SUMMARY and PURPOSE: Provides analysis, monitoring, reporting and oversight of employee benefit costs for Milwaukee Public Schools (MPS). Analyzes and reports on the financial performance of the MPS benefit programs. Promotes and protects the financial integrity and stability of MPS through budget development; analysis and execution. Provides advice and technical assistance with cost analysis, fiscal allocation and budget preparation for the Office of Human Capital. Reviews department budget submissions for completeness, accuracy and conformance with established procedures, regulations, and organizational objectives. Analyzes information and evaluates results to choose the best solution and solve problems and assists with long-range financial planning.</p>	

ESSENTIAL FUNCTIONS: Indicate the approximate percentage of time devoted to each major task or group of related tasks. Summarize position in no more than 15 tasks, each of which requires at least 5% of incumbent's time.

NOTE: An essential function must meet the following criteria:

- 1) The reason the position exists is to perform that function,
- 2) No other employee is available to perform that function,
- 3) The function is highly specialized, and
- 4) Removing the function would fundamentally alter the job.

1. Drafts and disseminates written guidance to the Office of Human Capital on the development of annual operating budget submissions and financial planning. Analyzes and reports information regarding Milwaukee Public Schools revenues and expenditures for its employee benefit programs for use in reporting District's benefit costs and liabilities.
2. Provides and supports the data requirements for production of actuarial valuations for employee benefit programs and related financial forecasts.
3. Meets and interacts with department leaders to provide guidance and direction on budget matters based upon established policies and procedures.
4. Enforces district financial standards through the monitoring of department expenditures. Directs budget and expenditure classifications as appropriate.
5. Performs detailed assessments of actual performance against budgeted performance and prepares reports that explain and identify budget variances.
6. Develops data and prepares analysis of the financial impact of proposed benefit programs and activities. Compiles and analyzes accounting records and other data to determine the financial resources required to implement the program. Projects future financial needs to maintain the program/benefit.

7. Reviews and analyzes budget requests submitted by the Office to ensure their completeness, accuracy and conformance with procedures and regulations. Summarize budgets and submits recommendations for the approval or disapproval of fund requests.
8. Performs cost-benefit analyses to compare operating programs, review financial requests and explore alternative financing methods.
9. Interprets budget directives and establishes policies and procedures for carrying out directives, identifies information by categorizing, estimating, recognizing differences or similarities and detecting changes in circumstances or events.
10. Gathers data, creates reports, dashboards, charts and graphs used to monitor and illustrate district benefit costs including cost drivers and program utilization.
11. Develops cost analysis and maintains knowledge and stays abreast of developments in the field of employee benefits, human resources, outsourcing of services, business, finance, accounting and information technology.
12. Actively supports the MPS Strategic Plan.
13. Performs other duties as assigned.

SUPERVISION RECEIVED: (Indicate the extent to which work assignments and methods are outlined, reviewed, and approved by others.)

Receives general supervision from the Manager, Pension and Data Systems and the Chief Human Capital Officer.

SUPERVISION EXERCISED: (List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following: (a) assign duties; (b) outline methods; (c) direct work in process; (d) review completed work; (e) sign or approve work; (f) make hiring recommendations; (g) prepare performance appraisal; (h) take or recommend disciplinary action.

N/A, may direct the work of teams

JOB REQUIREMENTS: To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and ability required. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

Education Requirements (Include certificates, licenses, and/or registrations required.)

Position requires a bachelor's degree in accounting, finance OR a related field. An advanced degree is desired.

Experience Requirements

Five years of progressively responsible administrative or financial management experience, preferably in a public sector environment.

Knowledge, Skills, and Abilities

Effective oral and written communication and presentation skills. Must be able to work with diverse populations across all levels of the organization. Must have progressive experience in analyzing and reporting financial data including the design and preparation of dashboards, financial reports, graphs and charts. Experience performing financial analysis of employee benefits for mid-size to large self-funded employers with comparable benefit programs is desired. Proficiency in and knowledge of HRIS systems required, Oracle/PeopleSoft is desired. Advanced MS Office and database experience is required. The ability to explain complex financial concepts clearly and concisely to non-financial staff. Must be skilled in gathering, evaluating and analyzing data and preparing reports for senior management. Knowledge of business and management principles, strategic planning, resource allocation, human resources modeling and coordination of people and resources is necessary. Must be able to understand contracting and state and federal regulations surrounding the field of human resources, particularly benefits. Must be able to work on multiple projects with established deadlines.

WORKING ENVIRONMENT: The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.

General office environment.

Reasonable accommodations requested by qualified individuals with disabilities will be made in accordance with the Americans with Disabilities Act (ADA) of 1990.

PHYSICAL DEMANDS: 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 with or without reasonable accommodation.

General office environment, must be able to handle light lifting and occasional standing, bending.

THIS DESCRIPTION DOCUMENTS THE GENERAL NATURE AND LEVEL OF RESPONSIBILITY ASSOCIATED WITH THIS POSITION. IT IS NOT INTENDED TO BE A COMPREHENSIVE LIST OF ALL ACTIVITIES, DUTIES AND RESPONSIBILITIES REQUIRED OF INCUMBENTS. IT IS NOT INTENDED TO LIMIT OR MODIFY THE RIGHT OF ANY SUPERVISOR TO ASSIGN, DIRECT, AND MONITOR THE WORK OF EMPLOYEES UNDER SUPERVISION.