



POSITION DESCRIPTION

JOB TITLE: Financial Planning and Budget Analyst III Job Class: 1120	
DATE Oct. 2019	Office of Finance Department of Financial Planning & Budget Services
BARGAINING UNIT: ASC	FLSA STATUS: <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non exempt
Pay Schedule: Pay Range: \$	Management Approval:
POSITION SUMMARY and PURPOSE: Promotes and protects the financial integrity and stability of Milwaukee Public Schools (MPS) through budget development, administration and analysis. Serves the district through monitoring programs, procedures and legislation, both internal and external, that could impact MPS finances and operations.	

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. Provides fiscal, program and legislative analysis to department heads and the superintendent in support of annual budget allocation recommendations and key department and special interest budget initiatives.
2. Provides training and instruction to school leaders and department heads in the preparation of line item budgets and budget narratives for presentation of the Superintendent's Proposed Budget.
3. Enforces district financial standards through the monitoring of department and school expenditures. Directs budget and expenditure reclassifications as appropriate.
4. Advises district administrators, program managers and school leaders of variance concerns and recommends improvements to financial practices.
5. Seeks and develops ways to improve business processes, studies and responds to financial requests, prepares budget reports, and formulates recommendations to management officials for proper program planning and effective decision making.
6. Assists in the preparation of the District's long-range financial forecasts; supports presentation of complex financial information to management and other groups; and conducts research and analysis on finance-related projects.
7. Establishes collaborative and cooperative relationships with departments in order to problem solve and assist departments in dealing with complex issues. Assists departments in the preparation of more complex budgets and budget materials.
8. Serves as a regular mentor to other department staff to become more proficient and regularly demonstrates and shares expertise with other budget analysts. Supports the supervision of

budget analysts by identifying methods, directing work in process; reviewing completed work and signing or approving work

9. Reviews and analyzes request to fills made by departments and schools to ensure their completeness, accuracy, and compliance with position control procedures.
10. Actively supports the MPS Five Priorities of Success.
11. Performs other duties as assigned.

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

The incumbent performs a variety of routine work within established policies and procedures and normally receives little instruction on day-to-day work and receives general instructions on new assignments from the Director of Financial Planning & Budget services and/or the Financial Planning & Budget Services Coordinator.

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.

Coordinates work of other budget analysts; project supervision only.

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

Bachelor's degree in Finance, Accounting, Business Management, Public Policy Administration or closely related field. Master's degree is desirable.

Experience Requirements

Three years experience in Finance, Accounting, Budgeting, Business Research or closely related field. Government experience is preferred. Proven aptitude, competence, and experience with budget and forecasting processes and development.

Knowledge, Skills and Abilities

Excellent verbal and written communication and presentation skills. Excellent analytical and evaluative skills. Ability to understand and interpret Milwaukee Public Schools Board policies and procedures; labor contracts guides and state and federal regulations governing financial management and reporting requirements. Ability to work with people with diverse educational and cultural backgrounds. Ability to lead teams in the completion of complex tasks. Knowledge of financial concepts. Ability to explain complex financial concepts clearly and concisely. Advanced skills using database and spreadsheet software. Ability to work independently with little or no supervision. Ability to work under pressure due to multiple priorities and strict time schedules.

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.