

CITY OF MADISON POSITION DESCRIPTION

Name of Employee (or "vacant"):

Elizabeth York

Work Phone: 608/267-8706

2. Class Title (i.e. payroll title):

Administrative Analyst 4 (Request promotion from current position of Administrative Analyst 3)

3. Working Title (if any):

None.

4. Name & Class of First-Line Supervisor:

Budget and Program Evaluation Manager (Currently Vacant)

Work Phone: 608/267-4913

5. Department, Division & Section:

Finance Department, Budget and Program Evaluation Section

6. Work Address:

210 Martin Luther King, Jr. Blvd., Room 406; Madison, WI 53703-3345

7. Hours/Week: 38.75

Start time: 8:00 a.m. End time: 4:30 p.m.

8. Date of hire in this position:

07/26/09 – Accountant 2

02/21/10 – Administrative Analyst 2

07/08/12 – Administrative Analyst 3

9. From approximately what date has employee performed the work currently assigned:

Gradual change in duties since January 2014

10. Position Summary:

This position is responsible for developing, analyzing and administering budgets; serving as a liaison between the Finance Department and City agencies; preparing schedules for the financial and single audits of the city; and assisting with conducting reviews, studies and financial and performance audits. The work is performed under the general supervision of the Budget and Program Evaluation Manager.

11. Functions and Worker Activities: (Do NOT include duties done on an "Out-of-Class" basis.)

50% A. Develop, analyze and administer operating and capital budgets.

1. Prepare budget requests for some City agencies, services and projects.

2. Analyze and make recommendations on budget requests, including the reallocation of existing and potential resources and the impact of financial initiatives (such as the setting of utility rates and long-term borrowing commitments), to policymakers.

3. Prepare and interpret projections of the future impact of proposed and existing city programs and services.
4. Manage the technical budget process in the City's financial software, including oversight of the compilation and presentation of financial data, writing of budget and financial reports and technical budget instructions.

- 20% B. Perform economic, financial and policy studies, as well as financial and performance audits.
1. Develop work plans, conduct interviews, perform tests, examine records and prepare projections (within federal, state and local regulations and Generally Accepted Accounting Principles, where appropriate), for City agencies and external entities.
 2. Analyze and evaluate the data collected to determine whether systems are effective, transactions are appropriate and resources are allocated appropriately. Determine the impact on existing and future services, the budget and the tax levy.
 3. Develop recommendations for improvement, prepare reports, communicate results to policymakers and perform necessary follow-up.
 4. Assist the City's internal audit function, including preparation and other assistance to the City's independent auditors during the annual financial audit.

- 20% C. Serve as liaison between the Finance Department and City agencies regarding administrative and budgetary issues.
1. Prepare and/or approve fiscal notes for resolutions and ordinances.
 2. Represent the Finance Department as a member of or staff to various Citywide committees.
 3. Meet with agency heads and agency financial staff and provide expertise and advice on fiscal matters.

- 10% D. Participate in other activities.
1. Prepare schedules for the financial and single audits of the City in accordance with federal and state regulations and Generally Accepted Accounting Principles.
 2. Prepare, coordinate and review Citywide schedules for federally-declared disasters and serve as a liaison between federal, state and county emergency management officials and City agencies.
 3. Write and manage financial reports using the City's software.

12. Primary knowledge, skills and abilities required:

Knowledge of the principles of business administration and management, budgetary principles, public finance and professional accounting theory, principles and practices. Ability to perform analytic studies and financial and performance audits. Ability to conduct interviews, collect and evaluate data and compile and present financial and narrative reports and recommendations. Ability to apply accounting theory to operational functions and problems. Ability to create spreadsheets to effectively present complex financial data and to create documents and reports to present analytic findings and recommendations. Ability to develop and maintain effective working relationships with a wide variety of City and external business contacts. Ability to communicate effectively both orally and in writing.

13. Special tools and equipment required:

None.

14. Required licenses and/or registration:

None.

15. Physical requirements:

None.

16. Supervision received (level and type):

General, with increasing independence as experience is gained.

17. Leadership Responsibilities:

- This position: is responsible for supervisory activities (Supervisory Analysis Form attached).
 has no leadership responsibility.
 provides general leadership (please provide detail under Function Statement).

18. Employee Acknowledgment:

- I prepared this form and believe that it accurately describes my position.
 I have been provided with this description of my assignment by my supervisor.
 Other comments (see attached).

Elizabeth York
EMPLOYEE

1/5/2015
DATE

19. Supervisor Statement:

- I have prepared this form and believe that it accurately describes this position.
 I have reviewed this form, as prepared by the employee, and believe that it accurately describes this position.
 I have reviewed this form, as prepared by the employee, and find that it differs from my assessment of the position. I have discussed these concerns with the employee and provided them with my written comments (which are attached).
 I do not believe that the document should be used as the official description of this position (i.e., for purposes of official decisions).
 Other comments (see attached).

David Blum Duke
SUPERVISOR

1/5/2015
DATE

Note: Instructions and additional forms are available from the Human Resources Dept., Room 501, City-County Bldg. or by calling 266-4615.