



Budget and Procurement Manager

General Information

Classification Code:	MGRPGR
Effective Date:	July 18, 2023
Pay Grade:	D61
FLSA Status:	Exempt

Position Summary

The Budget and Procurement Manager is responsible for the day-to-day administration and supervision of the City's Budget and Procurement programs to include managing the development of the City and SEDA budget, financial forecasting, managing the City's decentralized procurement program, managing the City's purchase card program, leading City-wide process improvement initiatives, and providing technical expertise and complex analysis to City executives, managers, and analysts.

Classification Characteristics

The Budget and Procurement Manager falls under the Manager/Program Manager classification and is responsible for interpreting and carrying out the programs or objectives set by Senior Program Managers or Executive Managers and decides how best to use the assigned resources. Manager/Program Managers have responsibility for one or two program areas whereas the higher-level classification has responsibility for multiple programs or major project areas.

Essential Duties

The duties listed below are a typical sample; position assignments may vary.

- 1 Plans, organizes, manages, and administers the annual budget process from preparation through adoption including supplemental budgets, mid-year budget adjustments, special financial analysis, and long-term financial plans and forecasts. Ensures compliance with State budget laws, ORS and other regulations related to appropriations, revenues, public notices, publications and tax levy certifications. Prepares, analyzes, monitors, and evaluates budget controls, revenues, and expenditure projections throughout the year.
- 2 Develops budget calendar and rolls out forms, templates, timelines, and instructions. Provides training, technical advice and assistance to departments regarding the budget process, procedures, and budget laws. Prepares data for use by departments in developing their budget submissions including revenue, payroll and other expenditure budgets. Staffs and supports the City's Budget Committee. Ensures meetings are noticed correctly, and statutory requirements are met.
- 3 Compiles, proofreads, and finalizes budget document, for submission to regulatory agencies including the Government Finance Officers Association (GFOA). Ensures budget document complies with Oregon budget law and contains necessary information for the GFOA budget award.
- 4 Develops, manages, prepares, and maintains complex financial forecasting models. Performs estimations of future values and data utilizing quantitative and qualitative forecasting techniques, time series methods, causal methods and other established forecasting methods. Research and compiles critical data including local, state, regional and national economic trends for incorporation into forecasting models. Collaborates with department management to ensure budgeting and financial forecasting needs are met and incorporates economic trends into forecasts.
- 5 Manages the City's procurement and public contracts program for the purchase of a wide range of services, goods, equipment and construction and professional services. Identifies cooperative purchasing

Essential Duties	
	opportunities. Provides training and support to departments in complying with purchasing policies, practices and procedures. Prepares or participates in the preparation of routine to complex requests for proposals, qualifications, and bid packages for construction and professional services and equipment purchases
6	Administers the City's purchasing administrative regulation in compliance with ORS and City Municipal Code. Coordinates with City Attorney's Office to research, update and implement required policies, practices and procedures. Reviews city departments' purchasing activities, contracts and bid documents to ensure they follow applicable regulations.
7	Manages the City's purchase card program.
8	Provide excellent customer service, research complex errors or discrepancies and resolve problems in a timely and professional manner. Participate in special projects as assigned including fee or cost studies, research, financial analyses, etc.
9	Supervises staff to include training, coaching, evaluating performance, responding to grievances and effectively recommending hiring, discipline and termination actions. Communicates goals and expectations, reviews work produced to ensure completeness and accuracy.
10	Prepares, presents and communicates written and oral reports conveying financial and budgetary information based on detailed research, critical analyses, and independent judgment to the City Manager, Council, boards, commissions, other governmental agencies, and community groups in a timely, accurate, understandable and meaningful form as required. Creates charts, graphs, and tables for effective presentation of information.
11	Develop and maintain appropriate computer programs, complex spreadsheets and analytical procedures to perform detailed financial and statistical computations for use in the preparation of the budget and other analyses. Evaluate and implement new software systems as needed to ensure proper system controls and efficiency.
12	Performs other duties of a similar nature or level.

Functional Specific Responsibilities
N/A

Qualifications
Minimum Qualifications: <ul style="list-style-type: none"> Bachelor's Degree in a related field; and 5-7 years progressively responsible experience in a field related to area of assignment; and 1-2 years of program and or personnel management experience or equivalent combination of knowledge, skills, education, and experience to successfully perform the job.
Licensing/Certifications: <ul style="list-style-type: none"> N/A
Technology Skills: <ul style="list-style-type: none"> Accounting software – PeopleSoft Financials Budget development software - BOARD Calendar and scheduling software — Scheduling software Document management software — Adobe Systems Adobe Acrobat Electronic mail software — Email software Internet browser software — Web browser software Office suite software — Microsoft Office Presentation software — Microsoft PowerPoint Spreadsheet software — Microsoft Excel Word processing software — Microsoft Word

Qualifications

Knowledge Required:

- Administration and Management — Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.
- Clerical — Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, stenography and transcription, designing forms, and other office procedures and terminology.
- 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.
- Economics and Accounting — Knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.
- English Language — Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
- Law and Government — Knowledge of laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules, and the democratic political process.
- Personnel and Human Resources — Knowledge of principles and procedures for personnel recruitment, selection, training, compensation and benefits, labor relations and negotiation, and personnel information systems.

Skills:

- Active Learning — Understanding the implications of new information for both current and future problem-solving and decision-making.
- Active Listening — Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- Complex Problem Solving — Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.
- Critical Thinking — Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- Instructing — Teaching others how to do something.
- Judgment and Decision Making — Considering the relative costs and benefits of potential actions to choose the most appropriate one.
- Management of Financial Resources — Determining how money will be spent to get the work done, and accounting for these expenditures.
- Management of Material Resources — Obtaining and seeing to the appropriate use of equipment, facilities, and materials needed to do certain work.
- Management of Personnel Resources — Motivating, developing, and directing people as they work, identifying the best people for the job.
- Monitoring — Monitoring/Assessing performance of yourself, other individuals, or organizations to make improvements or take corrective action.
- Reading Comprehension — Understanding written sentences and paragraphs in work related documents.
- Service Orientation — Actively looking for ways to help people.
- Social Perceptiveness — Being aware of others' reactions and understanding why they react as they do.
- Speaking — Talking to others to convey information effectively.
- Writing — Communicating effectively in writing as appropriate for the needs of the audience.

Abilities:

- Category Flexibility — The ability to generate or use different sets of rules for combining or grouping things in different ways.
- Deductive Reasoning — The ability to apply general rules to specific problems to produce answers that make sense.
- Inductive Reasoning — The ability to combine pieces of information to form general rules or conclusions (includes finding a relationship among seemingly unrelated events).

Qualifications

- 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).
- Mathematical Reasoning — The ability to choose the right mathematical methods or formulas to solve a problem.
- Memorization — The ability to remember information such as words, numbers, pictures, and procedures.
- Number Facility — The ability to add, subtract, multiply, or divide quickly and correctly.
- Oral Comprehension — The ability to listen to and understand information and ideas presented through spoken words and sentences.
- 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.
- Time Sharing — The ability to shift back and forth between two or more activities or sources of information (such as speech, sounds, touch, or other sources).

Physical Requirements

Key	None 0% (0 hrs.)	Seldom 1-10% (Up to 1 hrs.)	Occasionally 11-35% (Up to 3 hrs.)	Frequently 36-75% (3-6 hrs.)	Continuous 76-100% (6+ hrs./day)
	0%	1-10%	11-35%	36-75%	76-100%
BODY POSITIONS					
Standing			X		
Sitting				X	
Walking – Even Surface			X		
Walking – Uneven Surface		X			
Kneeling		X			
MOVEMENTS					
Bending/Stooping		X			
Twisting		X			
Crawling		X			
Squatting/Crouching		X			
Balancing		X			
Reach – Overhead			X		
Reach – Forward			X		
Reach – Backward			X		
Climbing – stairs			X		
Climbing - ladder			X		
USE OF HANDS					
Grasping – whole hand				X	
Grasping – pinch grip				X	
Fine manipulation/feeling				X	
	0%	1-10%	11-35%	36-75%	76-100%
PUSH/PULL					
0-10 lbs.			X		
11-20 lbs.			X		
21-50 lbs.		X			
51-75 lbs.		X			
76-100 lbs.	X				
ENVIRONMENTAL HAZARDS					
Indoors		X			
Outdoors		X			
Dust		X			
Fumes/Odors/Gasses		X			
Chemical Agents		X			
Biological Agents		X			
Noise – Low			X		
Noise – Moderate		X			
Noise – High		X			
Low Light		X			
Heat		X			
Cold		X			
Restricted workspace	X				
Vibration – whole body	X				

Physical Requirements											
Keyboarding				X		Vibration - extremity	X				
LIFT/CARRY						JOB SPECIFIC					
0-10 lbs.			X			Driving – vehicle/equipment		X			
11-20 lbs.			X			Operate foot controls	X				
21-50 lbs.		X				Seeing					X
51-75 lbs.		X				Talking				X	
76-100 lbs.	X					Hearing				X	
						Extended work hours				X	

Classification History

2023.07 Created and adopted by HR

I have reviewed the job description.

Employee: Name_____ **Signature**_____ **Date**_____