



THE METROPOLITAN WATER DISTRICT
OF SOUTHERN CALIFORNIA

BUDGET TEAM MANAGER

Group-Section: Office of the Chief Financial Officer – Budget and Financial Planning Section	FLSA Status: Exempt Bargaining Unit: MAPA	Salary Grade: 062 Job #: TM080
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JOB SUMMARY

Responsible for the coordination and overall development of Metropolitan's budget; extensive and in-depth research and analysis related to assigned programs or projects; and Metropolitan-wide planning for multiple fiscal years to help determine expenditure levels for Operations and Maintenance. Coordinates assigned program activities with other departments and outside agencies including preparation, presentation, and documentation of departmental budgets.

OVERSIGHT

Supervision Received: Receives direction from the Section Manager or Assistant General Manager/Chief Financial Officer.

Supervision Given: Manages and supervises a staff of professionals and paraprofessionals.

JOB DUTIES

1. Supervises staff including directing, assigning, and monitoring work, coaching, mentoring, addressing personnel issues, providing motivation, discipline, and guidance; determines Team and/or project priorities and aligns work load with available resources; reviews work for thoroughness, adherence to applicable standards, policy, and accuracy; ensures the team provides reliable service to customers; and monitors projects and staff to ensure compliance with regulatory requirements, and adherence to safe work practices and policies.
2. Assesses staff performance and competencies, and completes employee performance evaluations; develops and trains employees in applicable techniques and methodologies; partners with HR to administer and track training plans for skills and professional development, and enhancement of the team's members; provides cross-training opportunities as appropriate, and develops team succession plans; ensures staff completion of mandatory and recommended training including regulatory compliance and safety training. Takes an active role in developing a safe work environment, and promoting the safety of self and others by implementing safety training, monitoring employee adherence, and promptly evaluating and implementing safety recommendations.
3. Provides general administration of the team including establishing and tracking organizational goals and objectives; determines and implements strategic priorities; provides input regarding policies and procedures; development of team vision, standards for customer support, service plans and priorities; develops and approves team, project, and work schedules and leave requests, and analyzes and reviews team activities and prepares various reports; reviews and approves time, reimbursement requests, and purchases.
4. Develops and monitors team, project, and equipment budgets to ensure the most efficient use of resources; prepares cost estimates and oversees the requisitioning of materials, equipment, and supplies necessary to meet organization goals and objectives; assures

adequate supply of inventories; assures adherence to established guidelines and accurate and timely reporting and accounting, and tracking and control of budgetary information; evaluates resource needs and prepares staffing, equipment, and consulting requests; prepares, reviews and/or approves purchases, purchase and vendor service requisitions, and contract documents.

5. Acts as a technical advisor for team and cross-organization activities; assigns and directs the work of team members; develops, reviews, and submits improvement project proposals; acts as a subject matter expert related to administrative and/or operational issues, and facility improvements; participates in establishing procedures and standards for efficient, safe and reliable operations.
6. Meets with internal and external customers to coordinate work on projects and initiatives; initiates, and supervises staff activities; collaborates with other managers and staff to ensure reliable, cost-effective and safe operations; provides accurate, timely and thorough communication to other members of the management team on issues relating to team responsibilities, standards, and compliance.
7. Manages the development of Metropolitan's annual budget. Process includes obtaining input from executive management, the Board of Directors and member agencies. Oversees and directs the development of operations and maintenance budgets for each group and department, earnings, power and miscellaneous income.
8. Manages the annual development and ongoing maintenance and status reporting of the Chief Financial Officer's Business Plan, assists in the development of the General Manager's Business Plan, and supports Metropolitan's performance measures including advising groups on the development and maintenance of performance measures and reporting results on a quarterly basis.
9. Develops and makes presentations to the Board, authors Board letters for action by the Board of Directors on Metropolitan's budget, and publishes the annual budget book including submission to the Government Finance Officers Association for excellence in budgeting award consideration.
10. May represent the Office of the Chief Financial Officer on other personnel and policy matters, as required.
11. Directs, assists in, performs, or assesses special analyses of business issues including cost-benefit analyses, business process analyses, and group budget functional analyses.
12. Develops and presents budget, cost-benefit, and financial training to Metropolitan employees and managers.
13. Performs other related duties as assigned.

EMPLOYMENT STANDARDS

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Job Code: TM080
Effective: 6/28/20
Adopted: 5/19/21
Revised:
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MINIMUM QUALIFICATIONS

Education and Experience: Bachelor's degree from an accredited college or university and eight years of increasingly responsible relevant experience, of which two years must have been in a project management, supervisory, or lead capacity; or an advanced degree from an accredited college or university and six years of increasingly responsible relevant experience, of which two years must have been in a project management, supervisory, or lead capacity.

Required Knowledge of: Public sector budgeting and accounting practices; public finance and administration principles and practices; performance measures; business planning theory and application; cost analysis and management techniques; principles and practices of project management and development including planning, scheduling, and budgeting; applied research techniques related to assigned programs; advanced principles and techniques of research, investigation and analysis; principles and practices of public sector contract administration and management; pertinent Federal, State, and local laws, codes, and regulations.

Required Skills and Abilities to: Prepare project plans and reports; effectively manage projects within schedule and budget; prepare comprehensive administrative and technical documents and reports; review work products for detail and adherence to guidelines; communicate effectively orally and in writing, on administrative, technical and financial topics; encourage and facilitate cooperation; exercise sound professional judgment and discretion; establish and maintain collaborative working relationships with all levels within the organization, other agencies, elected officials and the public; and use presentation and business applications; prepare presentations for executive management, Board of Directors and member agencies.

CERTIFICATES, LICENSES, AND REGISTRATIONS REQUIREMENTS

Certificates

- None

Licenses

- Valid California Class C Driver License that allows you to drive in the course of your employment

Registrations

- None

DESIRABLE QUALIFICATIONS

Proficiency in Microsoft Office productivity tools on the personal computer including Outlook, Excel, Word, PowerPoint, and Project.

PHYSICAL DEMANDS/WORK ENVIRONMENT

The physical demands and work environment characteristics described here are representative of those that must be met or may be encountered by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Physical Demands: The work is sedentary. Typically, the employee may sit comfortably to

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MWD

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do the work. However, there may be some walking; standing; bending; carrying of light items such as paper, books, or small parts; driving an automobile, etc. No special physical demands are required to perform the work.

Work Environment: The work environment involves everyday risks or discomforts that require normal safety precautions typical of such places as offices, meeting and training rooms, libraries, and residences or commercial vehicles, e.g., use of safe work practices with office equipment, avoidance of trips and falls, observance of fire regulations and traffic signals, etc. The work area is adequately lighted, heated, and ventilated. May travel to various sites requiring overnight stay.

Vision Requirements: No special vision requirements

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