



## Human Resources

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DATE: March 24, 2021

TO: Civil Service Board

FROM: Theresa Severance  
Manager, Human Resources, Healthcare and Safety

SUBJECT: New Job Classification of Budget & Grant Supervisor

### **RECOMMENDATION:**

**APPROVAL OF THE JOB DESCRIPTION FOR THE NEW CLASSIFICATION OF BUDGET & GRANT SUPERVISOR.**

### **Background Information**

In October of 2019, the City created a position of Budget & Grant Analyst in an effort to combine responsibilities of the Budget & Operations Analyst and the Grant Coordinator. Both positions were interrelated in that one position was researching, compiling, and writing grants, while the other position was monitoring, requesting reimbursement, and reporting on grants requiring collaboration between to ensure grant requirements. This combination position created a more efficient and effective way to monitor and provide fiscal analysis of the grants, and allowed departments to be proactive financially in situations when grants are not renewed and may leave a gap in the budget.

As a result of continuous grant funding, including addition of staff to perform duties under those grants, we have determined there is a need for a supervisor level position to oversee the grant-funded staff. By providing a direct supervisor that is familiar with the grants, the City ensures that grants are properly administered and that employees are properly guided in their roles to satisfy the requirements of each grant.

The job classification was discussed with the supervisory union and all are agreeable to the proposed job description.

### **Outline of Duties**

This is a new job description that is being created to support to assist with the overall administration, monitoring, and improvement of the financial, budget, and grant performance of the an assigned department. This classification will also supervise departmental budget and grant-related staff to ensure program requirements are met.

### **Recommendation**

Based on the above information, and in accordance with Section 13-7 of the Civil Service Code, I recommend that the Civil Service Board approve the new job classification and description for Budget & Grant Supervisor.

## **BUDGET & GRANT SUPERVISOR**

### **SUMMARY/PURPOSE**

This classification will maintain the department-specific knowledge as well as expertise in the Finance Department functions to assist with the overall administration, monitoring, and improvement of the financial, budget, and grant performance of the assigned department. This classification will also analyze departmental operations to evaluate, report on, and suggest efficiency and effectiveness.

### **DISTINGUISHING FEATURES OF THE CLASS**

This classification serves in and functions as the liaison between the assigned department and the Finance Department and provides supervision of assigned staff including but not limited to employees performing grant related activities within their department.

### **ESSENTIAL DUTIES AND RESPONSIBILITIES**

1. Collaborate with department directors and managers and Finance Department personnel to develop departmental strategic plans, capital improvement plans, budgets, and financial forecasts.
2. Analyze and interpret financial and quantitative data, build consensus through the presentation and review of data and through solicitation of feedback and input.
3. Survey and continuously monitor needs relative to available funding sources.
4. Compile departmental data to fulfill reporting requirements for the City or external agencies and groups, ensuring the accuracy of information provided; monitor department financial reporting and planning systems to ensure data integrity.
5. Assist in the analysis of month-end and year-end close figures; collaborate and assist Finance personnel and key managers to research and correct any errors.
6. Analyze departmental operations and compare appropriate metrics to benchmarks to evaluate and report on efficiency and effectiveness.
7. Assist and guide departmental personnel to successfully accomplish their finance-related responsibilities to the City and external agencies and groups.
8. Research, compile, write, and submit grant applications.
9. Review and monitor department grants, requisitions, expenditures, and encumbrances for conformance with budget and grant specifications; analyze monthly financial results to determine and report underlying causes for variances between current periods and budget, forecast, and prior periods.
10. Prepare and submit quarterly or annual reports as required by granting agencies.
11. Prepare and submit resolutions as required.
12. Review project status, revenues, and expenditures to ensure proper expenditures are made for grant projects.
13. Resolve issues and conflicts with funding agencies.
14. Be an effective team member by exhibiting self-motivation, supporting other employees in handling tasks, interacting effectively and respectfully with others, showing a desire to contribute to the team effort, accepting assignments willingly, and completing tasks within agreed upon timelines.
15. Manage employee performance and provide training, coaching, and mentoring for employees.
16. Provide clear, sufficient, and timely direction and information to the employees about plans, expectations, tasks, and activities.
17. Demonstrate highly effective leadership by promoting and supporting the mission and vision of the organization, recognizing and defining issues, and taking initiative towards improvements.
18. Recommend the hire, transfer, assignment, promotion, employee grievance resolution, discipline, suspension, or discharge of assigned personnel.
19. Provide for ongoing training of employees in emerging methods, trends, technologies, and proper and safe work methods and procedures.

20. Establish and maintain positive working relationship with the employees by maintaining two-way communications, producing consistent results, advocating for the team when appropriate, and offering their expertise to improve processes, systems, and the organization.
21. Other duties may be assigned.

### 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, skills, and abilities required.

1. Education & Experience Requirements
  - A. A four-year bachelor's degree in accounting, finance, business administration, or a related field and two (2) years full-time experience; OR
  - B. A four-year bachelor's degree plus at least four (4) years of full-time experience in financial planning, budgeting, reporting, or business analysis; OR
  - C. An associate's degree in accounting plus at least five (5) years of full-time experience as stated above; OR
  - D. A combination of related education and experience equaling seven (7) years.
  - E. Two (2) years of qualifying experience in a lead or supervisory capacity.
2. Knowledge Requirements
  - A. Knowledge of the operation of automated accounting and budgetary recordkeeping systems.
  - B. Knowledge of budgetary and financial recordkeeping methods and practices.
  - C. Knowledge of general accounting principles and procedures.
  - D. Knowledge of the methods and techniques used in statistical and fiscal analysis.
  - E. Knowledge of pertinent local, state, and federal laws and City policies, rules, and regulations.
  - F. Knowledge of the principles of process improvement.
  - G. Knowledge of effective research principles and methods.
  - H. Knowledge of grant application process.
  - I. Knowledge of grant writing and reporting principles and techniques.
  - J. Knowledge of effective leadership and personnel practices.
3. Skill Requirements
  - A. Skill in operating a personal computer and software applications, including word processing, database analytical tools, spreadsheet, and presentation software to effectively produce complex, professional reports, charts, presentations, documents, and other products.
  - B. Skill in identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.
  - C. Skill in understanding the implications of new information for both current and future problem-solving and decision-making.
  - D. Skill in using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems.
  - E. Skill in communicating effectively, both orally and in writing.
  - F. Strong analytical and critical thinking skills, with ability to challenge and research factors behind the financials.
4. Ability Requirements
  - A. Ability to work independently, meet deadlines, work under pressure, and handle changing priorities.
  - B. Ability to make calculations and data entries with a high degree of accuracy and to be detail-oriented.
  - C. Ability to create and maintain a positive working environment that welcomes diversity,

- ensures cooperation, and promotes respect by sharing expertise with team members, fostering safe work practices, and developing trusting work relationships.
- D. Ability to establish and maintain effective working relationships with administrators, staff, funding organizations and community groups.
  - E. Ability to provide customer service in a collaborative, consultative, and positive manner.
  - F. Ability to evaluate operations and make budget and operational recommendations based on findings.
  - G. Ability to develop recordkeeping systems and to maintain records.
  - H. Ability to read, apply and explain rules, regulations, policies, and procedures.
  - I. Ability to take initiative and to utilize innovative techniques in preparing grant applications.
  - J. Ability to plan, prioritize, and coordinate multiple projects.
  - K. Ability to consistently and independently prioritize one's own work and the work of others, including scheduling, assigning staff, and securing resources.
  - L. Ability to create and maintain a positive working environment that welcomes diversity, ensures cooperation, and promotes respect by sharing expertise with team members, fostering safe work practices, and developing trusting work relationships.
  - M. Ability to maintain confidential information.
  - N. Ability to use good judgment in decision-making.
  - O. Exhibits leadership qualities of dependability and accountability.
5. Physical Ability Requirements
- A. Ability to sit for extended periods of time.
  - B. Ability to occasionally lift and carry items weighing up to 10 pounds.
  - C. Visual acuity to prepare and analyze data and figures.
  - D. Manual dexterity to use keyboard and calculator.
  - E. Ability to talk and hear to obtain and provide information.
  - F. Ability to attend work on a regular basis.

HR: TS	Union: Supervisory	EEOC:	CSB:	Class No:
WC:	Pay:	EEOF:	CC:	Resolution: