

TITLE: PROJECT BUDGET ANALYST

DEFINITION: The Project Budget Analyst provides a full range of project budgetary, financial, and analytical services to project managers in all phases of capital projects and programs for the Port of Long Beach Engineering Capital Program, including planning, design, and construction projects.

DISTINGUISHING CHARACTERISTICS:

Grade Level I	Under general supervision, the Project Budget Analyst is responsible for tracking and monitoring multiple capital and expense project budget expenditures in a centralized program and project management system.
Grade Level II	Under limited supervision, the Project Budget Analyst performs complex duties of the classification. Manages multiple capital and expense project budget expenditures and authorizations under a capital program in a centralized program and project management system. Analyzes and makes suggestions on project budget expenditures and authorizations. Assists in the closeout process of a project.
Grade Level III	Independently performs the most complex duties of the classification. Manages multiple capital and expense project budget expenditures and authorizations under a capital program in a centralized program and project management system. Analyzes and makes suggestions on project budget expenditures and authorizations. Coordinates project contract closeout as well as complete project closeout. Prepares and assembles exhibits, charts, reports and other narrative and statistical material used by project managers, management and executive staff. May lead and review the work of others.

EXAMPLES OF DUTIES:

The functions of the classification may include, but are not limited to, those listed below:

- Sets up, reviews, and analyzes projects/programs within a financial and centralized program and project management system from initiation through closeout.

- Performs, monitors and coordinates project financial, budgeting, scheduling, and contractual obligations, with broad responsibility for dealing with issues relating to those areas.
- Provides project financial and budgetary oversight of multiple capital projects efficiently and concurrently in a centralized program and project management system.
- Determines and monitors the work authorizations of capital projects.
- Reviews the project funding request (PFR) worksheet in the program and project management system and performs operational analyses of required documents related to the projects within the Capital Program.
- Monitors project funds, preparing and monitoring detailed project information used in the annual and quarterly cash flow projections/forecasting and the 10-year projection.
- Provides advice and guidance to project managers on the initial preparation of quarterly obligations and expenditures based on the project schedules including capital & grant funding.
- Assists project managers in resolving funding issues such as labor costs and contract amounts and ensures that necessary corrections are processed in the financial management system and project management system.
- Monitor all project changes in costs throughout each gateway of the project and resource utilization in a centralized program and project management system.
- Reviews engineering project related Board memos to ensure proper application of the Port's Budget Policy and is responsible for uploading documents into appropriate tracking software.
- Advises project manager, Project Delivery Team (PDT) members, and other stakeholders on the status and availability of funds, organizational costs, and accruals for projects.
- Utilizes a financial system and program and project management system to monitor and analyze multiple years of financial data over the life cycle of the assigned project, to include current year funds, resource control and future year funding and labor requirements.
- Ensures that the project work management cost estimates in the centralized program and project management system and financial systems reconcile.
- Coordinates the fiscal year end close out of projects with the project managers, PDT, and the Finance Division including close out of project construction contracts, and the various project phases.
- Verifies that the project accounting and financial data is in accordance with regulatory and Port of Long Beach budget policies.
- Utilizes financial systems and centralized program and project management systems to prepare a wide variety of project management reports, including annual financial reports, monthly project status evaluations, and quarterly project closeout

reports and quarterly cash flow status reports to management and project stakeholders.

- Prepares and assembles exhibits, charts, reports and other narrative and statistical material used by project managers, management and executive staff.
- May lead and review the work of others.
- Performs other related duties as assigned.

MINIMUM QUALIFICATIONS:

- A Bachelor's Degree in Business Administration, Public Administration, or a related field.
- Three years of experience in providing budgetary and financial services to project managers managing small, large and complex long-duration design and construction projects is required. Additional experience may be substituted for the required education on a year-for-year basis to the extent that the experience has prepared the individual to perform the duties of the classification.

DESIRABLE QUALIFICATIONS:

- Project management experience and/or relevant coursework in the principles of project management.
- Experience with a centralized project management software is preferred.
- Detailed knowledge of the industry standard for managing Capital Programs and the principles of project funds management.

HISTORY:

Approval/Adoption Date:

06/07/17 – Civil Service Commission