

Constant Contact Survey Results

Survey Name: Budget Analyst Training Survey

Response Status: Partial & Completed


Filter: None

Nov 09, 2009 10:01:16 AM






TextBlock:

During the NCLGBA Winter Conference in Charlotte on December 2-4, 2009, a workshop will be offered focusing on topics that are important in the development of Budget Analysts. We would like your opinion on topics we should cover and discuss during the course of this workshop. Please answer the following questions. Responses are automatically collected once you "Submit" your entries. This survey will be open until 12 Noon, Monday, November 9th. Thank you for your time and participation.







Please indicate the type of local government you work for.

Answer	0%	100%	Number of Response(s)	Response Ratio
City/Town			24	60.0 %
County			15	37.5 %
School District			1	2.5 %
Authority/COG/Other			0	0.0 %
No Response(s)			0	0.0 %
Totals			40	100%












Please indicate the level of experience you have (in years) with budgeting.

Answer	0%	100%	Number of Response(s)	Response Ratio
Less than 1 year			3	7.5 %
1-2 years			3	7.5 %
3-5 years			11	27.5 %
6-10 years			10	25.0 %
More than 10 years			13	32.5 %
No Response(s)			0	0.0 %
Totals			40	100%

Please indicate your current position or title.






Answer	0%	100%	Number of Response(s)	Response Ratio
Analyst or Technician			16	40.0 %
Budget Manager/Director			11	27.5 %
Finance Director/Officer			6	15.0 %
Head of Department other than Finance			1	2.5 %
Deputy Jurisdiction Executive (i.e., Assistant City/County Manager)			0	0.0 %
Jurisdiction Executive (i.e., City/County Manager, School Superintendent)			1	2.5 %
Academic			0	0.0 %
Consultant			0	0.0 %
Other			5	12.5 %
No Response(s)			0	0.0 %
Totals			40	100%

* Which of the following skills or areas of knowledge do you believe someone entering the budgeting field needs to possess familiarity with prior to employment? Check all that apply

Answer	0%	100%	Number of Response(s)	Response Ratio
Concepts of government budgeting			34	85.0 %
Concepts of accounting			21	52.5 %
Understanding of local government structure and administration			31	77.5 %
Understanding of fund accounting			23	57.4 %
Concepts of government debt			15	37.5 %
Ability to read and analyze financial reports			30	75.0 %
Proficiency with spreadsheets			36	90.0 %
Proficiency with database design			6	15.0 %
Technical and narrative writing skills			25	62.5 %
Persuasive writing skills			16	40.0 %
Other			9	22.5 %
Totals			40	100%

* On a numeric scale, please rank the following skill and knowledge factors often associated with budget analysis.

1 = Most

Answer	1	2	3	4	5	Number of Response(s)	Ranking Score*
Knowledge of budgeting concepts						40	1.6
Knowledge of accounting concepts						40	3.5
Knowledge of local government structure & administration						40	3.0
Proficiency with spreadsheets						40	2.7
Writing skills						40	4.1

*The Ranking Score is the weighted average calculated by dividing the sum of all weighted rankings by the number of total responses.

Please share with us any "pet peeves" you have related to your experience as a supervisor of budget analysts (all answers are anonymous).

16 Response(s)

Please share with us any "pet peeves" you have related to your experience as a budget analyst. You can include those you may have with respect to supervision (all answers are anonymous).

14 Response(s)

If you are a supervisor, what are the biggest expectations you have of a newly-hired budget analyst?

18 Response(s)

If you are an analyst, what are the biggest lessons you had to learn "on the job" that you wish you could have prepared yourself for prior to employment?

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3. Please indicate your current position or title. - Other responses

Answer

CPA

Assistant Budget Director

Operating Department Analyst

Business Officer

Fiscal Administrator

4. Which of the following skills or areas of knowledge do you believe someone entering the budgeting field needs to possess familiarity with prior to employment? Check all that apply - Other responses

Answer

State Statutes related to local gov't budgeting

Knowledge of difference between city and county responsibilities.

concepts of perf. mgt

Proficiency with English speaking skills

strong analytic skills, interpersonal skills, problem solving

Initiative, Detail-oriented

research study skills

Analytical skills

Tact and diplomacy skills (how to say no nicely)

5. On a numeric scale, please rank the following skill and knowledge factors often associated with budget analysis. - Comments

Answer

These are all equally important.

financial and management analysis would be my actual #2 skill/knowledge factor

Depending on how directly involved the analyst gets during budget season with the departments, he or she may need good negotiation skills, as well as good presentation skills, especially the ability to explain concepts without talking down to his or her audience. Also, the ability to engender trust in others goes a long way towards getting the departments to trust the analyst's judgment and to cooperate with Finance staff to get requests and reports in on time.

If they don't understand accounting and how the expenditures will be coded and how revenues will be recognized, all the budgeting knowledge in the world would still be useless.

Missing from this list is the soft skill of being able to work with various departmental personalities.

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6. Please share with us any "pet peeves" you have related to your experience as a supervisor of budget analysts (all answers are anonymous). - Responses

Answer

Test

Ability to translate technical information into short, concise message points that a lay person can understand.

bringing problems with no suggestions for solving

Poor attention to detail

Lack of understanding of government structure

Failure to just go look up items in statutes

Requires judgement and ability to see broader implications- not everyone sees beyond the details or cannot appropriately zoom in and out between the details and big picture.

Poor writing skills

Lack of accounting background

New hires want to come in and supervise the process with no experience - they assume because you've been in government a while, your "old ways" are not valid in today's marketplace.

1. Not being able to put themselves in the shoes of their audience (Council, City Mgr, etc.) to communicate most effectively.

2. Not knowing how to break down a problem to analyze it, what data to use, and how to scope it appropriately. Not understanding the value/efficiency of "back of the envelope analysis" to gut check things.

Not detailed oriented, uses the excuse "I didnot know" without asking questions, no initiative, a sense of entitlement because their an mpa graduate

n/a

I have tried to include the budget analyst in most of the meetings that preceed putting the document together. If they don't understand why the numbers are there, they can't find any mistakes that are made.

Assuming you know the operating environment under which you work - sometimes getting a feel for management practices takes years of quietly watching and learning.

Being able to write effectively is not a budget skill. They should have this prior to arriving.

I'm not a supervisor. However, I do have a pet peeve with my supervisor(s)--not passing on changes (in numbers, procedures, direction from higher-ups, etc.) in a timely manner.

Not seeing the "big picture" and not being especially interested in anything beyond their immediate assignments.

N/A

Lack of knowledge of accounting principles.

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7. Please share with us any "pet peeves" you have related to your experience as a budget analyst. You can include those you may have with respect to supervision (all answers are anonymous). - Responses

Answer

Test

Departments need to build their own analytic capacity. It is impossible to analyse and make decisions when there is no data or the data is nearly impossible to collect.

lack of information sharing by my supervisors. learning requires exposure

Working with elected officials and county manager of requires preparing complex analyses and writing succinct summaries. However, there is a lack of understanding how long it takes to prepare these (often last minute) requests. It requires a bit of mindreading b/c they don't really know what they are looking for.

Micromanagement.

no formal training or oreintation for entry level analysts. also county does poor job of cross educating workers in order to understand how functions in other depts affect each other. sometimes feel like research studies presented arent taken seriously by dept/mgt/commissioners-politics rules at end of day There are many accounting classes but very few budgeting classes; however, there is a lack of classes relating to budgeting to send employees for formal training.

Assuming I knew about accounting principles - most I had never seen before. Especially prevalent in larger cities.

The City Manager not upholding deadlines, either allowing departments to "sneak in" requests well after deadlines have passed (thus creating a lot of additional work for Finance staff) or not enforcing them getting their stuff in on time. I can't tell a department director to meet a deadline so I really need the CM to push the issue and back us up.

Local governments are making a huge mistake in hiring non-accountants for budgeting positions, IMHO. Policy analysts are a very useful arrow to have in a budget department's quiver, but it shouldn't be their only arrow. Having worked for a budget director who did not understand the accounting side, I wouldn't do it again.

In my particular city, the budget department isn't taken as seriously or respected by administration in the way that I was led to believe by the faculty of my MPA program. Our work isn't considered to be as difficult or as important as work done by accountants and we have very little ability to make recommendations.

It is often assumed that you know how to do everything. Very little instruction/training is given.

Supervisors who are micro-managers, but pretend they're open to creativity, then criticize everything you submit.

Passive-aggressive supervisors who do not specifically state what they want and are insulted when you ask follow-up questions.

Finding key info through trial-and-error

Politics

upper manangement NOT sharing information you need to complete your budget, project managers requesting an unrealistic budget when they know money is tight.

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8. If you are a supervisor, what are the biggest expectations you have of a newly-hired budget analyst? -

Responses

Answer

Test

can work independently, has ability to understand local government and the role of budgeting. expect analyst to learn to work cooperatively with departments. expect to learn all about the inner workings of a dept. (ex. go w/ pothole patch crew and work alongside them).

Technologically savvy

Passion for innovative thought

Ability to communicate clearly

Strong analytical ability

respect co-workers

listen to everything

expect to interact in person with assigned department staff

Attention to detail

Ask questions

Show initiative

Demonstrate excellence with spreadsheets and numbers

Learn about budgeting and government

Demonstrate effective communication skills

budget and accounting background. bring new ideas and suggestions to the table

I expect initiative and self motivation.

1. Ask probing questions not shallow ones.

2. They can whip up a mean spreadsheet and explanatory memo quickly.

3. Interested in continuous improvement and always sharing ways to do things better.

4. Enthusiasm and curiosity.

5. Can-do-it-ness.

6. Emotional maturity.

7. Plays well with others and values other ideas.

Someone who takes initiative, ask questions, detail-oriented, not assuming, advanced spreadsheet database skills, knowledge and experience, of budgeting and local government, at least a mpa student

n/a

Spreadsheet genius!

The ability to catch on, learn quickly, manage data and information, work well with others and the desire to become a better employee. I would also expect an analyst to identify problem areas from data/info and design approaches for how to solve them (even as the solution involves other people).

They should be able to think independently. I can teach the rest.

N/A

A complete understanding of accounting issues (hopefully including fund accounting) and basic familiarity with budgeting techniques. All else can be taught on the job.

N/A

Ability to pick up things quickly and to understand accounting and especially spreadsheets.

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Take initiative to speak with me and call me out when I'm not giving them enough attention.

Demand that they be trained.

That they have a lot of patience, especially the first year.

Don't be "friendly." Department heads will take advantage of you. Be stern, polite and just do your job.

9. If you are an analyst, what are the biggest lessons you had to learn "on the job" that you wish you could have prepared yourself for prior to employment? - Responses

Answer

Test

Navigating the political environment; dealing with contentious groups/situations (interdepartmental and citizenry)

Revenue trending, integrating performance measures into the budget, capital budgeting, better excel skills

None

Change takes a very long time to come around.

Pay attention to the details and manage your time. Also the art of negotiation and simply saying no.

Think strategically and from all angles, otherwise something may be overlooked.

MICROSOFT EXCEL, capital/project planning, structure of county government,

Proficiency in MS Excel

Overall pictorial view of the budgeting process and how it intertwines with the accounting process. How to strategically plan for capital expenditures and capital replacements.

How to take data/reports/information and write meaningful analysis. Facilitate group meetings.

Since I prepare the actual budget book, I had to learn a lot about Excel and Word and merging them together. I also knew nothing about HTE or fund accounting and had to learn everything from scratch.

There were no classes or online courses available to me at the time so I had to teach myself most of it. I wish I had taken Govt Acctg at SOG sooner.

Had to learn fund accounting on the job!

(1)What real budgeting actually looks like - the 'mock' budgets in my MPA program were types not frequently used in real budgeting (ZBB, etc)

(2)Attention to detail to learn to memorize line-item specifics from an entire City's budget

(3)Analytical skills- how to evaluate programs/services/measures

(4)Gov't functions- water, streets, garbage, etc

Governmental and fund accounting.

That everything is political and "public service" notion is a myth. It's not any different from the private sector.

dealing with different personality types among the project managers, some are more cooperative than others.

It can be frustrating when you're learning a new system and there is not a readily available resource spelling out key concepts and timelines.

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10. Regardless of your background, what is the best piece of advice you can offer for new budget analysts? - Responses

Answer

Test

Local government budgeting is an art, not a science

Don't be afraid to ask questions. Ability to learn is more important than knowledge.

Get to know the department heads and major staff members of the departments. Work to assist departments provide their services. Do not be an impediment or a "Dr. no". Remember that you are a "support" department that is supposed to support those who actually deliver services to the citizens.

Develop a broad knowledge base about all government services; spend time in departments learning about their services; volunteer to do the tough assignments; commit yourself to ongoing professional development; attend council/commissioner meetings, even if you don't have to be there (this is the best way to understand the political "pulse")

attend all manager-level meetings you can.

attend all budget related council meetings you can.

Use judgement

If you don't know, don't be afraid to ask

Understand the context

Be obsessive about attention to detail

Read and learn everything you can about budgeting, accounting and government

Be proactive

Get to know the organization

look at the big picture

Be open minded, build relationships and don't burn bridges.

Demonstrate willingness to work on whatever task is assigned and know that frequently, listening skills are a significant contribution.

You will work with people with strong opinions and ideas. Don't be timid to contribute and don't take it personally when others have opinions/ideas different from yours. Keep an open mind and engage respectfully in the debate/conversations. The result is a richer experience for all.

You can never know it all, but you will learn something new everyday. Government budgeting is challenging and rewarding.

Ask questions, be detailed, don't take the easier solution/answer, dig/drill down and find out more than the surface level, anticipate questions from another perspective, if there's something/skill you don't have do whatever it takes to gain the knowledge and skill, you are in control of your destiny

enhance and improve microsoft excel skills, get comfortable with pivot tables and spreadsheets, don't be afraid to ask questions, don't expect to know all the answers

You have to love numbers and have to be a good proofreader. They have to always be ready to make a change. In government things are always changing.

Have very good understanding of the budget process for your agency and development excellent communications with the different departments.

Practice taking data/reports/budgets, requests, etc and tearing them apart analytically. Ask lots of questions, but don't assume you already know the answers.

Knowing numbers is only 10% of the job. The other 100% are in things that no one taught you in graduate school that you will have to learn on your own that no one has time to teach you.

Take every bit of training and attend as many conferences as you can. Ask questions and learn how every department functions. Be nosy-find out what issues are being faced by your organization so you'll understand how the budget needs to support those issues. Cultivate good relationships with staff in every department. Listen and learn.

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Understand the accounting. Follow the money. Know the costs, and think in terms of revenues and expenditures as opposed to merely looking at expenditures, or even expenditures and revenues but separately. To consider the revenues and expenditures together is to understand the bigger picture.

Study, study, study!

(1) Read as much background on your city as possible (old budget documents, council mtg mins, news releases- whatever you can get your hands-on)

(2) Get out to your departments and learn what they do, how they do it, and why it's important

(3) Take classes and brush up on whatever skills you need help with- law, eval, PM

Never stop learning, keep seeking out new information and continue trying to improve yourself.

Don't pretend to know it all. Learn from the experience of the organization. There are politics in every decision.

Make sure you're properly compensated, otherwise you'll feel taken for granted.

Make a plan for where you want to be in the next 2 years and stick to it.

get as much detail to support budgeted numbers as possible.

There is a lot of information to learn and experience will come with time so be patient.
