



## **BUDGET ANALYST**

### **Overview**

Heritage on the Marina is a continuing care Retirement Community located in the beautiful Marina district of San Francisco. We are home to approximately 120 senior residents and a Five-Star-Rated Medicare Community. We embrace the mindset, “Caring, which demonstrates we value one another.” We set ourselves apart by our conscious commitment to serve as a model of excellence for senior care.

Under the direction and supervision of the Controller, the Budget Analyst performs the more responsible and complex technical budget work by coordinating and assisting in the development, preparation, administration, maintenance, analysis, review and control of all department budgets. The budget analyst provides consultative budget service to department Directors and Managers; including implementing tools and strategies to stay within budget, researching variances, create and providing reports used for planning, forecasting, monitoring, and decision making.

### **Essential Job Duties**

- Collaborates with Controller, Executives, and Department Directors to develop annual budget; including budget revisions; reviews, analyzes, evaluates and processes budget change proposals.
- Provides budget information, instruction, reports, assistance and recommendations to Department Directors and Managers.
- Sets up new departments and GL accounts.
- Creates and prepares reports and correspondence, including reports to assist departments in analyzing “budget versus actual.”
- Monitors spending to ensure it remains within budget.
- Monitors and reports performance against plans to ensure that contractual, cost, and schedule objectives are met.
- Prepares monthly variance report, working with Department Directors.
- Forecasts and tracks financial results throughout the year to meet budget projections.
- Review purchase estimates, requisitions, invoices and other budget transactions or contracts.
- Attend meetings as needed and provide feedback on budget issues.
- Participate in all mandatory in-services and disaster drills.
- Serves as payroll backup.
- Perform other duties as assigned.

### **Education and other Qualifications**

- Bachelor’s degree in Finance, Budgeting, Accounting, or related field.
- Minimum 3 years of experience in accounting or finance or any combination of relevant experience and education.

- Demonstrated progressively responsible experience with duties involving the preparation, justification, and analysis, or the control and administration of a budget or budgetary program.
- Demonstrated high level of interpersonal skills to handle sensitive and confidential situations.
- Must complete and pass a physical examination with tuberculosis (TB) screen prior to employment.
- Employment contingent upon fingerprint clearance from the Department of Justice.

### **Knowledge, Skills and Abilities**

- Organized, detail-orientated self-starter and team player demonstrating excellent verbal, written, interpersonal communication and customer service skills.
- Must be able to function independently, have personal integrity, flexibility, and the ability to work effectively with residents, staff, and support agencies.
- Possesses excellent analytical and problem-solving abilities.
- Flexible and able to meet multiple and sometimes competing deadlines.
- Demonstrates professional behavior with all members of the community, including residents, colleagues, supervisor, staff, vendors, and other community members.
- Must be able to maintain composure and professional approach when dealing with the public.
- Must have the ability to focus on details, and to be accurate, concise, detail oriented, to think rationally, make independent and logical decisions.

The physical demands here are representative of those that must be met 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.

The Company provides equal employment opportunities to all employees and applicants for employment and prohibits discrimination and harassment of any type without regard to race, color, religion, age, sex, national origin, disability status, genetics, protected veteran status, sexual orientation, gender identity or expression, or any other characteristic protected by federal, state or local laws.

This is a full time, non-exempt position with benefits.