



Manager, Budget & Financial Planning

Job Code	20000183	Job Family	Manager/1st Level leader	Leader	
Department	Fin Plan Budget & Revenue	Reports to	Chief Financial Officer	Union Status	Non-Represented
FLSA Status	Exempt	Pay Grade	2060		
Last Updated	8/29/2022				

Accountability for Workplace Culture

Our PUD values are at the center of our culture. Putting the safety, health, and well-being of our communities and those we work with is valued above all else and everyone on Team PUD must meet this commitment daily. Nothing we do in achieving our Mission is worth a single injury, and all who interact with us must feel they are valued and welcomed as individuals.

Everyone on Team PUD, in all positions, is accountable for achieving this safe and welcoming culture by:

1. Taking full ownership for the safety of themselves and their coworkers, while ensuring everyone feels valued and welcomed.
2. Taking action to identify and eliminate their own and others' at-risk behaviors, including the behaviors that may undermine another's feelings of being welcomed and valued.
3. Following all safety rules and regulations and ensuring the PUD's expectations for conduct and respect are maintained.
4. Openly sharing near-misses, safety learning opportunities, and ways we can learn to be a more welcoming place while encouraging others to do the same.
5. Utilizing Stop Work Authority to intervene with anyone, anytime, in any place.
6. Intervening or seeking guidance to stop actions that are harmful to the wellbeing, health, or sense of belonging of others, and which are detrimental to our PUD values.

Job Summary

Ensure the successful development, presentation and timely approval of the District's annual budget and multi-year financial and rate plan in compliance with state law and District strategies and priorities. Proactively and regularly monitor and forecast District budget results and take corrective action as needed. Partners with appropriate staff to develop, maintain and provide training for District-wide budget reporting to support managerial decision making. Provides data, advice, research, and guidance in support of District projects as needed.

Accountabilities

Accountability #1

Achieve the highest level of employee and community trust in the District's fiscal management by ensuring the successful development, presentation and approval of the District's annual budget and multi-year financial and rate plan by providing effective communication, timelines, templates, and guidance. Work proactively and cooperatively with relevant District staff to aggregate and analyze budget information.

Accountability #2

Achieve the highest level of employee and community trust in the District's fiscal management by monitoring District budget health by proactively and regularly monitoring, forecasting and reporting on District budget results; take corrective action as needed; identify and address gaps in budget reporting needs and similar responsibilities.

Accountability #3

Achieve the highest level of employee and community trust in the District's fiscal management by leading the preparation, dissemination and approval of budget development materials including presentations, resolutions, budget books or equivalent, and other documents as necessary and similar responsibilities.

Accountability #4

Increase the public's confidence in the quality of the District's budget management by maintaining positive working relations with managers and other budget personnel. Respond to inquiries, provide advice and input on budget and other finance related topics and similar responsibilities.

Accountability #5

Demonstrate powerful partnership that reflects an understanding of community and customer needs by providing effective and relevant training to managers, budget coordinators and other related staff. Ensure sufficient tools and knowledge for budget management and similar responsibilities.

Accountability #6

Create a culture of caring, mutual respect and trust that empowers current and future employees to do their best work for the benefit of our team members, customers, partners and stakeholders by providing employees opportunities to develop, supporting employees through change, hiring the right person for the right job, recognizing employee performance and achievements, being open to receiving, feedback from our employees and working daily to ensure a more equitable and inclusive environment, and similar responsibilities.

Accountability #7

Demonstrate continual improvement that delivers outstanding value to our customers by developing, recommending, and effectively managing budget/s, identifying, evaluating, and recommending resourcing options that reflect appropriate prioritization and tradeoffs between cost and quality results, determining and realizing opportunities for improved efficiency and effectiveness, and similar responsibilities.

Accountability #8**Accountability #9****Accountability #10****Minimum Qualifications Note**

The minimum qualifications listed below are representative of the knowledge, skills, and abilities needed to perform this job successfully, as described in the Accountabilities. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential Accountabilities (duties and responsibilities) of this position. If you need assistance and/or a reasonable accommodation due to a disability during the application or recruiting process, please contact Human Resources at HRRecruiting@snopud.com, or by phone at 425-783-8655.

Qualifications – Education and Experience

Minimum Required Education and Experience:

Bachelor's Degree in Accounting, Business Administration, Finance, Public Policy, or related field,
AND

Two (2) years of progressively more responsible experience in finance or accounting;

OR

Six (6) years of progressively more responsible experience in finance or accounting.

Preferred Education and Experience:

Masters Degree in Finance, Business Administration, Accounting, or related field.

Qualifications – License(s) and/or Certification(s)

Minimum Required License(s) and/or Certification(s):

Preferred License(s) and/or Certification(s):

Certified Public Accountant or Certified Management Accountant

Qualifications – Skills and Abilities

Minimum Required Skills and Abilities:

Budgeting concepts, processes and systems

Computer applications including intermediate to advanced skill in Excel

Interpret complex information

Interpret and navigate general ledger reports

Prepare effective presentations, spreadsheets and financial reports

Develop and maintain excellent interpersonal relationships

Plan, prioritize and manage a variety of projects and shifting priorities

Interpret internal and external policies as it relates to the budget

Work in a fact paced, changing environment

Use independent and discretionary judgement.

Handle confidential information

Communicate and work effectively with all levels of the organization

Preferred Skills and Abilities:

Experience with Power BI reporting.

SAP ERP Experience

Knowledge of Federal Energy Regulatory Commission (FERC) and National Association of Regulatory Utilities Commissions (NARUC) uniform system of accounts.

Competencies

The following competencies describe the cluster of behaviors associated with job success in the job group identified as “Leader” at the Manager level.

- Adaptability
- Aligning Performance for Success
- Building Customer Relationships
- Building Talent
- Coaching
- Communication
- Continuous Improvement
- Continuous Learning
- Courage
- Creating a Culture of Trust
- Creating an Inclusive Environment
- Customer Focus
- Delegation and Empowerment
- Driving for Results
- Driving Innovation
- Emotional Intelligence Essentials
- Empowering Decision Making
- Execution
- Guiding Team Success
- Initiating Action
- Inspiring Others
- Leveraging Feedback
- Positive Approach
- Professional Knowledge and Aptitude
- Selecting Talent
- Stress Tolerance
- Technology Savvy

Physical Demands

Physical Demands List	Frequency
Sit	Constant (67-100%)
Walk	Seldom (1-10%)
Stand	Seldom (1-10%)
Drive	Seldom (1-10%)
Work on ladders	Never
Climb poles or trees	Never
Work at excessive heights (note heights in open text box below)	Never
Twist	Never
Bend/Stoop	Never
Squat/Kneel	Never
Crawl	Never
Reach	Never
Work above shoulders (note specific activity in open text box below)	Never
Use Keyboard /mouse	Constant (67-100%)
Use wrist (flexion/extension)	Seldom (1-10%)
Grasp (forceful)	Never
Fine finger manipulation	Constant (67-100%)
Operate foot controls	Seldom (1-10%)
Lift (note weight in open text box below)	Never
Carry (note weight in open text box below)	Never
Push/Pull (note specifics in open text box below)	Never
Work rapidly for long periods	Never
Use close vision	Constant (67-100%)
Use distance vision	Never
Use color vision	Constant (67-100%)
Use peripheral depth perception	Constant (67-100%)
Speak	Constant (67-100%)
Hear	Constant (67-100%)

Additional Physical Demands not listed above and associated frequency below.

Mental Demands

Communication	Frequency
Understand and carry out simple oral instructions	Frequent (34-66%)
Understand and carry out complicated oral instructions	Frequent (34-66%)
Train other workers	Frequent (34-66%)
Work alone	Frequent (34-66%)
Work as a member of a team	Frequent (34-66%)
Follow standards for work interactions	Frequent (34-66%)
Write communications for clarity and understanding	Frequent (34-66%)
Speak with clarity with others	Frequent (34-66%)
Comprehension	Frequency
Read and carry out simple instructions	Frequent (34-66%)
Read and carry out complicated instructions	Frequent (34-66%)
Retain relevant job information	Constant (67-100%)
Reasoning	Frequency
Read and interpret data	Constant (67-100%)
Count and make simple arithmetic additions and subtractions	Frequent (34-66%)
Use intermediate and/or advanced math	Frequent (34-66%)
Organization	Frequency
Plan own work activities	Constant (67-100%)
Plan work activities of others	Frequent (34-66%)
Direct work activities of others	Frequent (34-66%)
Resilience	Frequency
Work under pressure	Frequent (34-66%)
Work for long periods of time	Occasional (11-33%)
Work on several tasks at the same time	Constant (67-100%)

Additional Mental Demands not listed above and associated frequency below.

Work Environment

Environmental Conditions List	Frequency
Exposure to weather	Never
Wet and/or humidity	Never
Atmospheric conditions	Never
Confined/restricted working environment	Never
Vibratory Tasks – High	Never

Vibratory Tasks – Low

Never

Additional Environmental Conditions in this job not listed above and the associated frequency below.

Risk Conditions List

Frequency

Exposure to Heights

Never

Exposure to Electricity

Never

Exposure to Toxic or Caustic Chemicals

Never

Working with Explosives

Never

Exposure to Radiant Energy

Never

Extreme Cold

Never

Extreme Hot

Never

Proximity to Moving Mechanical Parts

Never

Noise Intensity

Never

Exposure to animals

Never

Working with angry customers

Never

Additional Risk Conditions present in this job not listed above and the associated frequency below.

On-Call Status and Frequency

On-Call is required.

Yes

No

On-call activities and frequency.

Work Location

The primary assignment for this position is:

Remote

Office Hybrid

- On-Site
- Field/Job Site

While this description has provided an accurate overview of responsibilities, it does not restrict management's right to assign or reassign duties and responsibilities to this job at any time. This position description is designed to outline primary duties, qualifications, and job scope, but not limit our employees or the organization to complete the work identified. In order to serve our customers best, each employee will offer their services wherever and whenever necessary to ensure the success of the District in serving our customers, to further the safety, health, and inclusivity of employees and the public, and achieve expectations of the District overall, while also remaining flexible in recognition of the employee's wellbeing.