

Senior Manager, Budget & Financial Planning



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|---------------------|---------------------------|-------------------|-------------------------|---------------------|-----------------|
| Job Code | 20000183 | Job Family | Senior Manager | Leader | |
| Department | Fin Plan Budget & Revenue | Reports to | Chief Financial Officer | Union Status | Non-Represented |
| FLSA Status | Exempt | Pay Grade | 2061 | | |
| Last Updated | 12/1/2024 | | | | |

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

Manages 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. Develops and implements budgetary policies, tools and guidelines. Partners with executive leadership, managers, and appropriate staff to develop, maintain and provide training for District-wide budget compilation and 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 managing 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 executive leadership, managers, and relevant District staff to aggregate and analyze budget information and provide insights for decision-making.

Accountability #2

Achieve the highest level of employee and community trust in the District's fiscal management by monitoring District budget health through proactive 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 in collaboration with other District leaders.

Accountability #4

Increase the public's confidence in the quality of the District's budget management by maintaining positive working relations with executives, 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 developing and delivering 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

Four (4) years of progressively more responsible experience in finance or accounting;

OR

Eight (8) 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.