

Capital Budget Development Manager



CITY OF
SAN JOSE
CAPITAL OF SILICON VALLEY

City Manager's Budget Office

PREP

■ THE CITY OF SAN JOSE

Known as the “Capital of Silicon Valley”, the City of San José plays a vital economic and cultural role in anchoring the world’s leading region of innovation. Encompassing 180 square miles at the southern tip of the San Francisco Bay, San José is Northern California’s largest city, third largest in the State, and the 12th largest city in the nation. With close to one million residents, San José is one of the most diverse large cities in the United States. San José’s transformation into a global innovation center has resulted in one of the largest concentrations of technology companies and expertise in the world, including major tech headquarters like Cisco, Adobe, Samsung, and eBay, as well as start-ups and advanced manufacturing.

San José’s quality of life is unsurpassed. Surrounded by the Diablo and Santa Cruz mountain ranges and enjoying an average of 300 days of sunshine a year, residents have easy access to the beaches along the California coast, including Santa Cruz, Monterey, and Carmel-by-the-Sea, Yosemite, and Lake Tahoe in the Sierra Nevada, local and Napa Valley wine country, and the rich cultural and recreational life of the entire Bay region.

San José has received accolades for its vibrant neighborhoods, healthy lifestyle, and diverse attractions from national media, including Business Week and Money magazines. The downtown area is home to high-rise residential projects, theaters, museums, and diverse entertainment attractions such as live music, live theater, cafes, restaurants, and nightclubs. Inquiring minds are served by The Tech Interactive, the San José Museum of Art, and many local galleries and venues. The City is served by 15 of the 32 public school districts in the County, and over 300 private and parochial schools provide residents with a range of educational choices. Universities in and near the City include San José State University, Santa Clara University, Stanford University, and three University of California campuses.

In 2011, the City adopted Envision San José 2040, a long-term growth plan that sets forth a vision and a comprehensive road map to guide the City’s anticipated growth through the year 2040. The Plan proactively directs significant anticipated growth in new homes and workplaces into transit-accessible, infill growth areas and supports evolution toward a more urban landscape and lifestyle. The San José area is powered by one of the most highly educated and productive populations in the United States. More than 40% of the workforce has a bachelor’s degree or higher, compared with 25% nationally.

Forty percent of San José residents are foreign-born, and 50% speak a language other than English at home. San José is proud of its rich cultural diversity and global connections and the essential role the City plays in connecting residents and businesses to the nation and the world.



■ THE CITY GOVERNMENT

The City of San José is a full-service Charter City and operates under a Council-Manager form of government. The City Council consists of ten (10) council members elected by district and a mayor elected at large. The City Manager, who reports to the Council, and her executive team provide strategic leadership that supports the policy-making role of the Mayor and the City Council and motivates and challenges the organization to deliver high-quality services that meet the community's needs. Department heads, including the Director of Finance, are appointed by the City Manager with confirmation by the City Council. The City actively engages with community members through Council-appointed boards and commissions.

In addition to providing a full range of municipal services, including police and fire, San José operates an airport, a municipal water system, a regional wastewater treatment facility, some 200 neighborhood and regional parks, and a library system with 24 branches. The City also oversees convention, cultural, and hospitality facilities that include the San José McEnery Convention Center, Center for the Performing Arts, California Theater, Mexican Heritage Plaza, and the SAP Center San José – home of the National Hockey League San José Sharks.

City operations are supported by 7,040 full-time equivalent positions and a total operating and capital budget of \$6.1 billion for the 2023-2024 fiscal year. San José is dedicated to maintaining the highest fiscal integrity and maintaining its consistently high credit ratings to ensure the consistent delivery of quality services to the community. Extensive information regarding San José can be found on the City website at www.sanjoseca.gov.

■ THE DEPARTMENT

The Budget Office operates under the leadership of the Budget Director, who reports to the City Manager. With a staff of nineteen, the Office is responsible for all functions associated with the development and monitoring of San José's budget for over 140 funds (General Fund, Special Funds, and Capital Funds) in alignment with the goals of the City Council. Budget staff are responsible for preparing and publishing all budget documents, forecasting revenues, and performing analysis of budget and program/service-level related issues. The Budget Office has a dynamic, action-oriented culture that offers flexibility within a mutually supportive and cooperative environment, collaborating with colleagues across departments to resolve complex fiscal issues.

Professional staff succeed in a team-centric atmosphere of meeting high expectations where quality contributions and achievements are valued and celebrated.



■ THE POSITION

The City Manager's Budget Office is recruiting for an Assistant to the City Manager to serve as the City's Capital Budget Development Manager. This is an unclassified, salaried position and is covered in the Civil Service system. This management position is not represented by a bargaining unit. This is a permanent at-will position with the City Manager's Budget Office reporting to the Deputy Budget Director. The Capital Budget Development Manager facilitates developing and overseeing the City's annual capital budget and five-year capital improvement program.

This position is responsible for the following:

- Managing the capital budget process, including, but not limited to, budget development of 14 capital programs, revenue and expenditure tracking and monitoring, financial status reporting, and capital revenue forecasting for approximately 50 funds at a combined annual budget of approximately \$1.9 billion.
- Leading the update and administration of the organization's Hyperion capital budgeting software system; researches and understands reporting requirements and ensures that systems are securely modified to meet these requirements; establishes best practices for system use; ensures that these practices are used throughout the organization; and trains departmental staff as needed.
- Coordinating capital budget activities across all City departments, develops annual capital budget training manuals/instructions, and leads city-wide training.
- Working collaboratively with City departments, solves capital budget issues and oversees capital funds management for inclusion in various budget documents such as the Annual Report, Mid-Year Budget Review, City Manager's Budget Request, and Five-Year Forecast, Proposed and Adopted Capital Budget and Five-Year Capital Improvement Program.
- Coordinates memorandum review activities and provides staff support for budget/fiscal implications for all City Council memoranda.
- Monitors economically sensitive information affecting City capital funds.
- Effectively supervises and motivates a team of Budget Office staff to ensure timely and accurate completion of assignments.
- Ensures alignment of the Capital Program with City Council priorities, policies, budget principles and City Manager directives and budget guidelines.
- Authors, reviews, and edits budget documents, reports, memoranda, and briefing materials for the capital budget.
- Studies City organizations, operations, and services to make recommendations to improve the quality and effectiveness of service delivery.
- Resolves and facilitates key issues that are confidential, controversial, or of major significance to the organization.
- Represents the Budget Office or City Manager's Office as assigned at public events including community groups, City Council sessions, Committee meetings, and Planning Commission budget review.



■ THE IDEAL CANDIDATE

The City Manager's Budget Office seeks a high-energy and enthusiastic professional in municipal budgeting who thrives in a collaborative and fast-paced environment.

A critical member of the Budget Office's senior management team, the ideal candidate possesses the technical skills necessary to ensure the accuracy of budget documents generated from the Hyperion budgeting software platform while applying a collaborative leadership approach among departmental partners to facilitate the analysis and decision-making necessary to resolve complex budgetary problems related to the construction and rehabilitation of public infrastructure. In support of the Budget Director, the incumbent initiates, designs, and implements projects to improve budgeting outcomes and processes, often crafting effective written communication of complex financial, budgetary, and operational information in a manner clear and accessible to the City Council and members of the public.

The ideal candidate should have strong analytical, organizational, writing, and verbal skills, enjoy handling multiple assignments simultaneously, work well under pressure within tight deadlines while displaying a positive can-do attitude, and is committed to high customer service standards. During certain portions of the year, long hours are required to meet budget document publication deadlines.

The ideal candidate will possess the most desirable combination of training, skills, and experience, as demonstrated in past and current employment history. Competencies desirable for this position include:

Job Expertise – Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies, and federal and state rules and regulations.

- Knowledge of the theory, principles, and practices of municipal governmental budgeting and finance as well as supervision and personnel management.
- Ability to understand the principles of the City's Hyperion budgeting platform and how the system's attributes can be leveraged to serve the needs of the City of San Jose's budgeting practices best.
- Knowledge of the City of San José's policies and procedures, including a complex matrix of laws, regulations, rules, and practices pertaining to the City's administrative processes, or the ability to quickly acquire this knowledge.

Analytical Thinking - Approaches a problem or situation by using a logical, systematic, sequential approach.

- Ability and willingness to dig into both financial and policy-related details, to ensure appropriate recommendations and work products are delivered with a high degree of accuracy.
- Ability to leverage software, particularly MS Excel, to analyze large volumes of data to identify problems and develop solutions.

Decision Making - Identifies and understands issues, problems, and opportunities; uses effective approaches for choosing a course of action or developing appropriate solutions.

- Ability to understand and quickly identify key issues related to decisions and recommendations, to make recommendations in difficult and complex situations, and to develop consensus.

Fiscal Management - Understands the relationship of the budget and resources to the strategic plan; complies with administrative controls over funds, contracts, and procurements.

Leadership - Leads by example; demonstrates high ethical standards; remains visible and approachable and interacts with others regularly; promotes a cooperative work environment, allowing others to learn from mistakes; provides motivational support and direction.

- Ability to stimulate and motivate individuals and groups to achieve desired goals.

Political Skills – Takes Action, demonstrating an understanding and consideration of how it will impact stakeholders and affected areas in the organization.

- Politically astute with a commitment to the City organization and community.

Problem Solving - Approaches a situation or problem by defining the problem or issue; determines the significance of problem; collects information; uses logic and intuition to arrive at decisions or solutions to problems that achieve the desired outcome.

Project Management - Ensures support for projects and implements agency goals and strategic objectives. Ability to manage multiple projects with short deadlines while preserving a high quality of work.

- Ability to work under pressure in a fast-paced environment.



■ THE IDEAL CANDIDATE

Vision/Strategic Thinking - Supports, promotes, and ensures alignment with the organization's vision and values; understands how an organization must change in light of internal and external trends and influences; builds a shared vision with others and influences others to translate vision to action.

Communication Skills - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills; displays openness to other people's ideas and thoughts.

- Effective communicator and presenter who is persuasive, straightforward, and proactive in addressing and responding to sensitive issues.

■ QUALIFICATIONS

Education: A Bachelor's degree from an accredited college or university in public administration, business administration, or a discipline related to the business performed by the department.

Experience: Six (6) years management and/or administrative experience in government or private business/industry.

- Experience managing a work unit equivalent to a major division within a public agency is strongly preferred.
- Experience with municipal capital budget development and management is strongly preferred.
- A Master's degree is preferred and may be substituted for one (1) year of the required experience.

Employment Eligibility: Federal law requires all employees to provide verification of their eligibility to work in the US. Please be informed that the City of San José will not sponsor, represent, or sign any documents related to visa applications/transfers for H1-B or any other type of visa that requires an employee application.

■ IMPORTANT INFORMATION

On employment and subsequently each spring, the incumbent of this position must file the Family Gift Reporting Form together with the Statement of Economic Interest-Form 700. View the following link for details related to the State-Required reporting: [Form 700 \(ca.gov\)](#) and the [City of San José Family Gift Reporting Form](#).



■ COMPENSATION AND BENEFITS

The Assistant to the City Manager (Unclassified) salary range is currently \$127,513.62 - \$198,497.00 annually. Placement within this range will be dependent upon the qualifications and experience of the individual selected. This salary includes an approximate five percent (5%) ongoing non-pensionable compensation. The salary is supplemented by an attractive benefits package that includes, but is not limited to:

- » **Retirement** – The City has its own competitive defined benefit retirement plan separate from and with full reciprocity with CalPERS.
- » **Health Insurance** – The City contributes 90% towards the premium for the lowest-priced non-deductible plan. Several plan options are available.
- » **Dental Insurance** – The City contributes 100% of the lowest-priced plan premium for dental coverage.
- » **Personal Time** – Vacation is accrued initially at the rate of three weeks per year, with amounts increasing up to five weeks after 15 years of service. Vacation accrual may be adjusted for successful candidates with prior public service to reflect a vacation accrual rate commensurate with total years of public service.
- » **Executive Leave** – of 40 hours is granted annually and, depending upon success in the Management Performance Program, could increase to up to 80 hours. Sick Leave is accrued at the rate of approximately 8 hours per month.
- » **Holidays** – The City observes 15 paid holidays annually.
- » **Deferred Compensation** – The City offers an optional 457(b) plan.
- » **Flexible Spending Accounts** – The City participates in Dependent Care Assistance and Medical Reimbursement Programs.
- » **Insurance** – The City provides a term life insurance policy equal to two times annual salary. Long-term disability and AD&D plans are optional.
- » **Employee Assistance Program (EAP)** – The City provides a comprehensive range of services .
- » **Parental Leave Program** – The City has a City-Paid Parental Leave program for which the incumbent in this position would be eligible. The program provides up to 320 hours of City-paid leave and are able to use up to 120 hours of their sick leave balances for the birth or placement of a new child, all of which must be used no later than 12 months from the birth or placement of the child.

Please visit our [website](#) for additional **Health** and **Executive Management Benefits** information.



■ HOW TO APPLY

This position will be open until filled from December 19, 2023 with first review date of January 18, 2024. To be considered, candidates must submit their application via email to Matt.Sadinsky@prepintl.com

- » A cover letter expressing interest - highlighting municipal budget management experience.
- » A resume that reflects the size of staff and budgets you have managed with both months and years of beginning and ending dates of positions held.
- » List of four work-related references: with contact information - two each of past or present supervisors, direct reports, and colleagues. References will not be contacted without prior notice.

Applications and resumes will be screened in relation to the criteria outlined in this brochure. Candidates with the most relevant qualifications will be invited to proceed in the selection process. Additional phases of the selection process will include one or more interviews. Final selection will be completed based upon a comprehensive review of references, background checks and other verifications as needed.

For questions, inquiries or candidate recommendations, please contact:

Matt.Sadinsky@prepintl.com



704.641.4417

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The City of San José and [PREP Intl](http://www.prepintl.com) are an equal opportunity employer. Applicants for all job openings will be considered without regard to age, race, color, religion, sex, national origin, sexual orientation, disability, veteran status or any other consideration made unlawful under any federal, state or local laws. The City of San José is committed to offering reasonable accommodations to job applicants with disabilities.

