

## **FINANCIAL ANALYST**

Salary Range: 12 (Management Salary Schedule)

### **DEFINITION**

Under general direction performs a variety of highly responsible and complex professional budgetary, financial, administrative, and analytical activities in support of the City; assists with preparation of the City's budget; analyzes compensation and benefit costs for negotiations and the compensation budget; assists in the analysis, reporting, and auditing of financial transactions; researches and prepares financial analyses and reports; prepares and reviews payroll related tax returns; performs related work as required.

### **DISTINGUISHING CHARACTERISTICS**

This is an advanced-journey level management classification where incumbents are expected to be fully competent to independently perform the full range of duties. Employees at this level receive only occasional instruction or direction as new, unusual or unique situations arise.

### **SUPERVISION RECEIVED AND EXERCISED**

The Financial Analyst receives general supervision from assigned management staff and may supervise or provide direction to assigned staff.

### **ESSENTIAL DUTIES, KNOWLEDGE, AND ABILITIES**

Duties may include, but are not limited to the following:

- Prepares and analyzes the citywide compensation budget; researches changes to rates, classifications, allocations and other matters with budgetary impact; analyzes and prepares final and mid-year compensation budget information.
- Assists with the preparation of various components of the Annual City budget; assists with complex aspects of the budget.
- Participates in the ongoing budget monitoring process; provides alternative budget scenarios for management review; creates and maintains spreadsheets and reports for budget analysis; implements necessary adjustments to the compensation budget.
- Serves as a resource for City staff in all departments in resolving budgetary questions and problems.
- Reviews, analyzes and interprets Memorandums of Understanding, Personnel Rules and Regulations, labor law, benefit contracts and other documents applicable to payroll, human resources, the compensation budget, and costing of proposals.
- Performs research and analysis of legislative issues, requirements or new procedures and prepares reports on their impact to administrative department operations; evaluates alternatives, develops recommendations, and assists in the implementation of recommendations as approved.
- Researches, develops, implements and interprets policies, procedures, standards and regulations applicable to the City's finance, payroll, human resources, purchasing and budget processes; ensures compliance with applicable laws and regulations.
- Gathers, assembles, preserves, and reports information to prepare notice of proposed

disciplinary actions, pre-discipline (Skelly) hearing reports, or orders of disciplinary action connected with employee discipline cases.

- Investigates, prepares findings, and makes recommendations regarding complaints of unlawful discrimination or harassment.
- Provides assistance and support to the City's Human Resources Division.
- Performs complex financial calculations and analysis; prepares comprehensive financial and payroll studies, statistics, statements, and reports.
- Collects compensation and benefit data; prepares analyses and reports; develops job specifications.
- Prepares costing of proposals and related research in support of the City's negotiating team.
- Supports the Human Resources Manager with employee /labor relations matters; assists in the collection and preparation of data used in negotiations; may participate in the collective bargaining process; handles the investigation and disposition of grievances; advises on grievance processing and dealing with disciplinary matters.
- Attends meetings to represent the City and may serve on various committees relative to department activities.
- Analyzes expenditure, revenue, and balance sheet accounts for compliance with all applicable generally accepted accounting principles, Federal, State, and City rules, regulations, and ordinances.
- Assists in the implementation and monitoring of various department and City programs and policies.
- Assists management staff with analysis and administration of the City's revenue and public finance programs, and special financing districts.
- Prepares staff studies and recommendations as directed; provides technical and administrative assistance as assigned.

## **EMPLOYMENT STANDARDS**

### **Knowledge of:**

- Principles and practices of municipal finance, budgeting, human resources, public administration, payroll administration, negotiations, and public policy development
- Principles and practices of public agency financial management including Generally Accepted Accounting Principles (GAAP), Governmental Accounting Standards Board (GASB), and advanced governmental accounting, budgeting, auditing, reconciliation, and financial reporting
- Principles and methods of position classification, examination development, job analysis and organization in the public sector; accepted practices to determine job content, evaluate complexity and difficulty of job duties, and identify required skills, knowledge and abilities
- Principles and practices of administering contracts with employee organizations, processing grievances, and dealing with disciplinary matters
- Pertinent federal, state and local laws, rules, ordinances and regulations related to finance and human resources
- Principles and practices of conducting analytical studies; evaluating alternatives, preparing clear

and concise reports, and making sound recommendations in a timely manner

- Public agency contracting and grant requirements
- Correct English usage, grammar, spelling, punctuation
- Principles and practices of statistics
- Advanced usage of Microsoft Office and similar programs

**Ability to:**

- Review and interpret Memorandums of Understanding and calculate related compensation and benefit costs
- Represent City policies and programs with other government agencies and the general public as directed
- Develop and analyze the City's compensation and benefits budget
- Develop, implement, interpret, and apply policies, standards, and procedures
- Provide assistance and support to the City's payroll function
- Analyze, evaluate and summarize varied information and data including reports, financial statements, and budgets
- Analyze complex issues, identify alternative solutions, quantify impacts of proposed actions, and implement recommendations in support of City objectives
- Interpret, analyze and apply applicable local, state and federal laws and regulations
- Prepare clear, concise and effective written reports, correspondence and other materials
- Organize and set priorities for a variety of projects and tasks to meet deadlines under changing conditions
- Work effectively with sensitive and confidential information
- Use computer software for the successful and efficient completion of assigned responsibilities; maintain proficiency in the applications used by the department including statistical analysis and forecasting software
- Use tact, initiative, prudence and independent judgment within general policy, procedural and legal guidelines
- Coordinate activities with other City departments and agencies as required
- Establish and maintain effective working relationships with those contacted in the course of the work
- Meet the physical requirements necessary to safely and effectively perform the assigned duties

**Minimum Qualifications**

*Any combination of training and experience that would provide the required knowledge and abilities is qualifying. A typical way to obtain the required qualifications would be:*

A Bachelor's degree from an accredited college or university in business or public administration, accounting, finance, economics, human resources, or a closely related field, and four (4) years of professional analytical, management or administrative work experience in budgeting, accounting, finance, public administration, or a comparable field. Public agency experience is desirable. A Master's degree in business or public administration, human resources, accounting, finance,

economics, or a closely related field or a CPA license may substitute for one (1) year of the required professional experience.

### **GENERAL QUALIFICATIONS**

#### **License Requirement**

A valid California Class C driver license or higher is required at the time of appointment. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

#### **Physical Requirements**

The incumbent appointed to this class must be physically able to perform the duties of this position, including the mobility to work in a standard office setting and use standard office equipment, including a computer; the ability to operate a motor vehicle and to visit various City sites and attend off-site meetings; vision to read printed materials and a computer screen; hearing and speech to communicate in person, before groups and over the telephone; finger dexterity to access, enter and retrieve data using a computer keyboard, typewriter keyboard or calculator and to operate standard office equipment; ability to bend, stoop, kneel, reach, push and pull drawers open and closed to retrieve and file information; occasionally lift and, carry reports and records that typically weigh less than 20 pounds.

#### **Working Conditions**

Incumbents work in an office environment with moderate noise levels, controlled temperature conditions and no direct exposure to hazardous physical substances, and may interact with upset staff and/or public representatives in interpreting and enforcing departmental policies and procedures. Employees may be required to work on evenings, weekends and holidays, and participates in afterhours on-call assignments.

#### **FLSA: E**

This job specification should not be construed to imply that these requirements are the exclusive standards of the position. Not all duties are necessarily performed by each incumbent. Additionally, incumbents may be required to follow any other instructions and to perform any other related duties as may be required by their supervisor.

*Adopted: May 2016*