



MANAGEMENT ANALYST

DEFINITION

Under direction, performs the full scope of analytical and professional duties and responsibilities as assigned, in areas such as finance, budget, human resources, risk management, housing and homeless programs, grants, contracts, and administrative functions in support of the City Manager's Office or the Department of Administrative Services; researches and analyzes practices and procedures and makes recommendations for organizational, operational, policy, and procedural improvements; participates in strategic planning, policy development, and legislative analysis; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives direction from assigned supervisory or management personnel. May exercise direct supervision or provide lead direction over technical and administrative support staff.

CLASS CHARACTERISTICS

This is a journey level classification in the Management Analyst class series performing a wide variety of duties for an assigned area such as finance, budgets, human resources, risk management, grants, contracts, and administrative functions. Incumbents perform the full range of duties as assigned, working independently, and exercising judgment and initiative. Incumbents at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit.

Positions are normally assigned to the Department of Administrative Services or City Manager's Office.

This class is distinguished from the Principal Management Analyst in that the latter is the advanced journey-level class in the series that has responsibility for performing difficult and complex City-wide budgetary, financial, economic, statistical, administrative, and analytical support duties.

ESSENTIAL DUTIES

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

- Identifies, plans, and implements goals, objectives, and priorities within areas of responsibility (finance, budgets, human resources, risk management, grants, contracts, city wide policy and/or administrative functions) in a manner consistent with the assigned department's overall goals and objectives; develops strategies and tactics for the successful achievement of set goals and objectives.
- Prepares and presents recommendations for review by higher-level management in connection with the analysis, studies, and reports described herein.
- Prepares and maintains a variety of records, reports, and correspondence related to program

activities.

- Coordinates assigned activities with other divisions, departments, governmental agencies, and outside organizations.
- Responds to requests for information from within the City as well as federal, state, and local agencies; researches, analyzes, and presents information as requested.
- Monitors, researches, reviews, interprets, and analyzes existing and new legislation and examines its effect on the City's operations; makes recommendations and provides alternatives to the City, departments, or special project team consistent with legislative guidelines and requirements.
- Composes a variety of technical and City Council agenda reports.
- Participates in special projects; may act as lead in a team project.
- Assists with managing the work of consultants; assists with the preparation of requests for proposals, review bids, and interviews, and recommend the selection of consultants; manages workflow, sets expectations and priorities, and reviews outcomes; assists with the negotiation and monitoring of contracts.
- Manages, directs, evaluates, monitors and supports the professional, technical, and administrative support staff within assigned area(s) of responsibility; acts as a resource to staff; advises staff on the more complex issues.
- Participates in City and/or departmental management meetings and works to resolve policy, procedural, or operational issues; acts as a liaison between outside agencies and department heads.
- Attends meetings, conferences, and workshops; may participate on committees and task forces; may make presentations to various groups and individuals.
- Performs related duties as assigned.

When assigned to Administrative Services

Human Resources

- Provides professional human resources consultation, support, and services to City departments in the areas of recruitment and selection, classification and compensation, performance management and discipline, labor relations, workers' compensation, benefits administration, medical leaves disability administration, and training.
- Researches, compiles, analyzes, and evaluates general and statistical information regarding selection procedures, recruitment methods, equal employment opportunity, classification, compensation, benefits administration, and other human resources practices and procedures.
- Plans and conducts recruitment and outreach activities; reviews and prepares job flyers; develops outreach, publicity, and advertising campaigns; reviews and rates job applications; coordinates and conducts interview panels.
- Participates in maintaining the City's classification plan; conducts job analyses and position reviews; develops and/or revises class specifications; prepares and presents classification/reclassification recommendations to City Council for adoption.

- Conducts salary surveys and labor market analyses; identifies possible compaction issues and internal/external salary alignment; makes recommendations regarding salary placement and adjustments for consideration to the applicable union and/or City Council.
- May participate in investigations of discrimination, harassment, retaliation, grievance, and abusive conduct complaints; prepare investigative reports; and interpret and apply memorandums of understanding, personnel rules, policies, and procedures
- Supports the Human Resources management with labor relations matters; assists with the collection and preparation of data used in negotiations; participates in the collective bargaining process and in the meet and confer process.
- Coordinates and participates in employee training, and provides professional support to departments regarding employee development.
- Coordinates and oversees the workers' compensation claims management function, which includes monitoring accepted claims; providing information to claimants, attorneys, and the workers' compensation carrier; assisting employees with resolving issues related to workers' compensation, safety, and health; attending hearings and legal proceedings; maintaining accurate databases; and preparing claim settlement authority requests.
- Reviews accident reports, medical reports, correspondence, and other material regarding workers' compensation claims; assists in determining and advising on work status and eligibility for benefits; manages claims to encourage impacted employees return to employment, where possible.
- Facilitates interactive process meetings with employees, supervisors, managers, and directors to determine reasonable accommodations to work restrictions under the Americans with Disabilities Act; and coordinates industrial disability retirements when necessary.
- Oversees the determination of employee eligibility for health, dental, vision, life insurance, disability insurance plans, retirement programs, and deferred compensation; researches and analyzes new, existing, and proposed programs to identify and recommend the most appropriate programs for City employees or necessary changes for existing programs.
- Administers and/or oversees processes and procedures to ensure compliance with medical and disability leaves, including the American with Disabilities Act, Family Medical Leave Act, California Family Rights Act, Pregnancy Disability Leave, Paid Family Leave, State Disability Integration, and other related laws.

Finance

- Conducts reviews of City operations, programs, and activities; evaluates actual versus projected outcomes; identifies areas of risk; recommends functional and operational changes needed to improve the economy, efficiency, and effectiveness of City government services and programs.
- Coordinates and participates in the preparation of the citywide annual operating and capital budgets; manages department procurement; authorizes expenditures in accordance with budget; assists in monitoring and controlling budget activities.
- Performs a wide range of fiscal activities for the City and related agencies, including budget preparation, monitoring investments, reporting, reconciliations, and debt management.

- Conducts complex studies and surveys pertaining to administration, personnel, and operations; identifies issues; formulates and presents recommendations and options for addressing issues.
- Performs strategic financial analysis to identify and recommend specific financing and risk management strategies; conducts market research to determine pricing.
- Assists in the development and implementation of fiscal, investment, and debt management policies, practices, and procedures.
- Develops comparative studies of other cities as they relate to municipal finance.
- Provides complex analysis of expenditures for each program, re-forecasts, and develops new budgets.
- Researches federal, state, and local programs to determine sources of funding and appropriate expenditure options; analyzes the policy and fiscal effects of new or proposed legislation.
- Participates in the construction of economic models and indexes; assists in the preparation of fiscal and economic project analysis.

When assigned to the City Manager's Office:

- Reviews and monitors the financial activity of assigned department's/division's budgets.
- Develops, manages, implements, and maintains major departmental, functional, or City-wide initiatives, programs, or projects; and coordinates interjurisdictional, interdepartmental, and/or interagency activities; communicates with appropriate City entities.
- May provide liaison and staff support to a variety of committees and commissions.
- Assists in organizational reviews within assigned departments; provides support and advice regarding strategic planning, identification of staffing needs and growth estimates to ensure consistency with City goals and priorities; identifies alternative solutions, prepares recommendations, and assists departments in implementing recommended and/or mandated changes.
- Plans, directs, manages, and monitors various administrative and operational analyses, studies, and audits; manages and participates in data collection with regard to needs assessments, benchmarking, and operational reviews of designated responsibilities; evaluates success and provides feedback.
- Leads and/or coordinates grant development and administration activities, including the more complex grant duties related to the solicitation and submittal of grant applications as well as the resolution of grant issues with various stakeholders; ensures compliance with grant terms and conditions.
- Monitors contracts and agreements for compliance, achievement of objectives, and adherence to performance and fiscal requirements; assists departments with preparation of agreements when appropriate.
- Provides professional and technical assistance in the development, administration and implementation of assigned housing programs which may include affordable housing, oversight and coordination of Community Development Block Grant (CDBG) funded-projects, qualifying low income loan applications and grant contract administration of federal and state housing programs.

- Negotiates and monitors compliance of various grant agreements or affordable housing agreements entered into between service providers or developers and the City.
- Assists in the development of new program elements and program modifications as assigned in order to meet program goals and objectives; monitor and coordinate the operation of assigned housing program areas; perform analytical work including feasibility analysis of development projects; assist in formulating program policies, goals and procedures.
- Coordinates and implements homelessness programs and services; develops and recommends policy on homelessness; offers recommendations for improvement and change.
- Compiles and analyzes data and makes recommendations on the formulation of policy and procedures.
- Interprets and develops policies, procedures, standards, and ordinances to ensure compliance with applicable laws and regulations.

QUALIFICATIONS

Knowledge of:

- Organizational and management practices as applied to the analysis, evaluation, development, and implementation of programs, policies, and procedures.
- Advanced principles and practices of public finance, budgeting, fiscal control, and administrative and policy analysis.
- Principles and practices of local government, including city administration, organization, programs, and functions.
- Principles and practices of affordable housing program administration and funding methods.
- Best practices and community approaches to prevent and end homelessness, including policy development and program management.
- Policies and programs affecting people experiencing homelessness in the health care field, criminal justice field, affordable housing policy and other intersecting systems.
- Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
- Analytical processes and project and/or program management including, but not limited to, purchasing, human resources, contracts, training, finance, budgeting, and other related program areas.
- Public agency contracting requirements, grant applications, and fiscal control of same.
- Communication techniques required for gathering, evaluating and transmitting information, and directing group discussions.
- Administrative principles and methods, including goal setting, program and budget development, and implementation.
- Personnel management and basic supervisory practices, including training and performance evaluation.
- City organization and functions; laws, rules, and regulations governing fiscal administration.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and City staff.

- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.

Ability to:

- Direct and participate in advanced administrative, fiscal, budgetary, and operational activities.
- Analyze City programs, budgets, and technical reports; interpret and evaluate staff reports; stay current with pertinent laws, regulations, and guidelines.
- Develop and administer policies, standards, and procedures.
- Perform professional work in the development, administration, and implementation of a variety of affordable housing programs.
- Accurately assess organizational issues in relation to homelessness and propose solutions and action plans.
- Enhance existing programs and develop new programs benefiting the homeless population.
- Negotiate agreement between differing individuals and groups, gaining cooperation through discussion and persuasion.
- Read, analyze, evaluate, and summarize written material and statistical data including narrative reports, financial reports, and budgets.
- Analyze systems and administrative and management practices and identifying opportunities for improvement.
- Prepare, monitor, and administer various agreements and contracts.
- Evaluate and develop improvements in operations, procedures, policies, or methods.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Interpret budgetary and financial statements.
- Devise methods and procedures for obtaining a variety of data.
- Assist in developing and implementing goals, objectives, practices, policies, procedures, and work standards.
- Analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals.
- Determine effective methods of research; compile data and present in a form most likely to enhance understanding.
- Plan, organize, assign, supervise, review, and evaluate the activities of assigned program areas.
- Develop, implement, and interpret goals, objectives, policies, procedures, and work standards.
- Prepare and present clear, concise, and logical written and oral reports.
- Coordinate activities with other City departments and agencies as required.
- Prepare and administer budgets.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.

- Effectively represent the department and the City in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Education and Experience

Possession of a bachelor's degree with major coursework in public or business administration, finance, human resources, economics, or a closely related field;

AND

Three (3) years of increasingly responsible professional experience performing public administration, finance, housing, or human resources functions; or

One (1) year of experience at a level equivalent to the City's class of Associate Management Analyst or Administrative Analyst.

When assigned to a specific functional area as noted above, additional knowledge and experience in such area may be desirable.

Public sector experience is preferred.

Licenses and Certifications

- Possession of, or ability to obtain and maintain, a valid California Class C Driver License and a satisfactory driving record is required. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various City and meeting sites; vision to read printed material and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard, typewriter keyboard, or calculator and to

operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL CONDITIONS

Employees primarily work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset individuals in interpreting and enforcing departmental policies and procedures.

WORKING CONDITIONS

Employees may be required to work evenings, weekends, and holidays, as well as participate in afterhours on-call assignments.

Emergency Service Workers: All City of Rocklin employees are designated as Emergency Service Workers during a proclaimed emergency and may be required to perform certain emergency services at the direction of the department and/or City.

This class specification should not be construed to imply that these requirements are the exclusive standards of each position as not all duties are necessarily performed by each incumbent.

Adopted	June 2009
Revised	October 2021, July 2022, October 2022, January 2023
FLSA	Exempt
Salary Schedule	Management/Range 15