

City of South San Francisco
Human Resources Department

Senior Financial Analyst
Class Description

Definition

To perform the most complex, responsible, professional and technical duties in providing staff assistance to the Budget and Financial Manager and/or Director of Finance or other management personnel; to coordinate City-wide budgeting, revenue forecasting; to conduct special studies, surveys and research assignment in a variety of administrative and operational procedures and topics, which have City-wide and/or major financial impact; and to do related work as required.

Distinguishing Characteristics

This is the highest-level class in the Financial Analyst series. Positions at this level are distinguished from other classes within the series by the level of City-wide responsibility assumed and complexity of duties assigned in the areas of budgeting, revenue forecasting, and special project studies. Employees perform extremely complex, difficult and responsible duties which require a great deal of independence of action and a full understanding of City-wide programs. Employees at this level are required to be fully competent in all procedures related to city-wide budgeting and revenue management. This position receives direction from the Budget and Financial Manager and/or Director of Finance or other senior management staff. This position may be expected to supervise clerical, supervisory or other professional positions.

Typical and Important Duties

1. Provide high-level staff work in coordinating the City-wide development of the annual budget, budget systems management, capital budget revenue forecasting and budget analysis and implementation.
2. Conduct surveys and perform research and statistical analysis on administrative, fiscal, personnel and operational problems.
3. Conduct financial analyses; prepare reports and make recommendations regarding City-wide cost recovery, rate structures, bonding, budgeting and other financial matters.
4. Prepare complex contracts, proposals, grant applications and similar documents; prepare reports and monitor grants and contracts for program compliance.
5. Prepare a variety of fiscal, administrative and management reports; prepare complex financial forecasting of expenditures and revenues.
6. Analyze long term financing needs, including rate models for Sewer and other funds, Redevelopment tax increment and growth projections, and bond/debt financing needs.
7. Under general direction, may coordinate bond/debt endeavors.
8. Manage complex projects that cross department boundaries and require City-wide coordination and communication.

9. Maintain and review complex automated systems that provide budget, financial, and programmatic and operational information.
10. Represent the city in interdepartmental, regional and professional meetings as required.
11. Assist in the coordination of intradepartmental and departmental budgeting, and revenue with other City departments and divisions and outside agencies.
12. Take a lead role in overseeing system aspects of the financial system.
13. Interpret Federal, State and City regulations; coordinate their application to City operations.
14. Make presentations regarding the development of the annual budget, current budget information and revenue projections to the City Council and others.
15. May require performance of complex quantitative and qualitative work, including systems analysis, evaluation of projects, present value and life cycle cost calculations.
16. Perform related duties as assigned.

Job-related Qualifications

Knowledge of:

- Principles and practices of public and financial administration.
- Principles, methods and practices of municipal finance.
- Budgeting and benefit and payroll administration.
- Sophisticated research techniques and practices.
- Methods of report preparation and presentation.
- Pertinent State, Federal and local laws and regulations.
- Principles of contract and grant administration.
- Modern office procedures, methods and computer equipment and software.
- Principles of organization and municipal government practices as applied to the analysis and evaluation of programs, policies and operational needs.
- Principles of supervision, training and performance evaluation.
- Statistics and techniques of complex financial forecasting, data analysis and numerical/financial analysis.
- City policies and procedures.

Ability to:

- Manage and participate in the analysis of a wide variety of complex administration, operational, financial problems and make effective operational and/or procedural recommendations.
- Coordinate a City-wide budgeting process.
- Review complex organizational, administrative and financial problems, and recommend and implement an effective course of action.
- Perform process improvements through the implementation of enhanced automated systems solutions which increase organizational efficiency.
- Effectively utilize automated computers and automated systems.
- Maintain confidentiality regarding City-wide policies and changes.
- Interpret policies, guidelines and procedures.
- Develop recommendations and assist in making decisions of considerable impact.
- Work independently with minimal supervision.

- Perform complex mathematical and statistical calculations accurately.
- Perform sophisticated financial and operational analysis to assist decision makers.
- Supervise, train and evaluate assigned staff.
- Evaluate program effectiveness.
- Administer city programs and coordinate work with other divisions, departments and outside agencies.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.

Skill in:

- Communicating verbally and in writing.
- Proficiency with spreadsheet programs.
- Making clear and through presentations to management and Council.

Experience and Training

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

Experience: Four years of increasingly responsible administrative and analytical experience related to City-wide budgeting, revenue forecasting or payroll functions.

Training: A bachelor's degree from an accredited college or university with major course work in public administration, business or a related field. A master's degree in business or public administration is highly desirable, and may be substituted for one year's experience.

Licenses and Certificates

All licenses and certificates must be maintained as a condition of employment.

- Possession of, or ability to obtain, a valid, appropriate California driver's license and a satisfactory driving record.

Special Requirements

Essential duties require the following physical skills and work environment:

Physical Skills: Able to use standard office equipment, including a computer; sit, stand, walk, kneel, crouch, stoop, squat, twist, and maintain sustained posture in a seated or standing position for prolonged periods of time; vision to read printed materials and a computer screen; hearing and speech to communicate in person, over the telephone, and to make presentations; lift and carry 35 pound boxes, files, and materials.

Work Environment: Mobility to work in a typical office and/or field setting.

Ability to: Travel to different sites and locations; drive safely to different sites and locations; maintain a safe driving record; work protracted and irregular hours or off-shift work for meeting attendance or participation in specific projects or programs.

Approved: July 2008
Revised Date:
Former Titles:
Abolished:
Bargaining Unit: Mid-management
ADA Review: July 2008
DOT: No
Physical: Class 3
Status: Classified/Exempt
EEOC Category: EF1\EJ2
Job Code: M

ADA Documentation of Essential Duties

1. SDE
2. SDE
3. SAE
4. SAE
5. SAE
6. SDE
7. SDE
8. SDE
9. SAE
10. SAE
11. SDE
12. SDE
13. SDE
14. SAE
15. SAE