

COUNTY OF SOLANO
CLASS SPECIFICATION
STAFF ANALYST (SENIOR)
Effective Date of Revision: 04/12/2017

CLASS SUMMARY:

This is the advanced journey level class in the Staff Analyst series. Under direction, the Staff Analyst (Senior) performs most, if not all, of the following:

(1) performs a variety of complex financial management roles to include (a) advising and assisting management of the department served by preparing and supplying financial management advice required to make management decisions, (b) reviewing, analyzing, evaluating and reporting upon program accomplishments in financial terms, and (c) assisting management in exercising effective control over the financial programs and resources of the organization by preparing, reviewing, analyzing, and monitoring budgets, expenditures, grants, contracts, etc. which are considered complex due to, for example, the size, multi-year scope, and/or accounting basis of the budget, the variety and funding ratio of funding sources, the fluctuations in revenue generation and/or cost reimbursements, the difficulty in performing cost analyses involving a variety of types of expenditures, the complexity of program activities which are impacted by changing laws and regulations, Federal and state fiscal interfaces, the size and complexity of grants and contracts and the difficulty in ensuring grant parameters and contract provisions are met;

(2) plans, schedules and conducts complex analytical studies involving diverse and intricate operations, programs and services of the department in order to develop and/or improve the effectiveness and efficiency of complex systems and procedures and to recommend solutions which often involve extensive changes in established procedures;

(3) manages administrative services for the entire department or one or more divisions of a large department;

(4) supervises a small clerical, technical and/or professional staff;

(5) analyzes legislative changes and judicial decisions for impact on department programs;

(6) prepares a variety of written reports and makes oral presentations; and

(7) represents the department at county, state and Federal meetings.

DISTINGUISHING CHARACTERISTICS:

This class is distinguished from the:

- **Staff Analyst** class which is the journey level class in the Staff Analyst series and which performs duties of a less complex nature as indicated by a combination of: the amount of guidance received; the level and lesser complexity and diversity of the budget, funding sources, and expenditures; the limited diversity, complexity and breadth of programs being studied; the level of the organization to which assigned; and the limited overall program responsibility; and the

- **Policy and Financial Analyst** class in that the employees in this class exhibit a higher level of responsibility in program oversight, monitoring, understanding, justifying, and articulating program needs.

SUPERVISION RECEIVED AND EXERCISED

Direction is provided by the supervisor of the work unit.

Employees in this class may supervise employees in clerical, technical and/or professional, classes.

ESSENTIAL DUTIES: This class specification represents the core area of responsibilities; specific position assignments will vary depending on the needs of the department.

Performs a variety of financial management duties that support the provision of financial management advice and support to department management:

- Manages budget activities by:
 - developing the budget for an entire department or, in larger departments, the most complex division budgets based on analysis of data collected including impact on service levels and operations and/or information required by the funding source;
 - providing financial analysis to maximize revenues and minimize expenditures;
 - projecting year-end expenditures and revenues;
 - developing and providing budgetary information to be used for feasibility studies, project/program development, and analysis of program viability, effectiveness and efficiency; and
 - submitting budgets and financial reports to appropriate agencies.
- Monitors, reviews, and analyzes fiscal aspects of programs by:
 - reviewing revenue projections, revenue trends, time studies, the impact of enacted or future legislation, etc. and their impact on projected budgets;
 - recommending and implementing solutions to improve revenue generation for department programs;
 - analyzing costs and projecting potential revenues based on expenditure trends;
 - analyzing and reporting to management the impact of equity adjustments, increases in fixed costs, or other actions;
 - coordinating with appropriate staff regarding revenue accruals, encumbrances, and expenditure accruals;
 - determining over-expenditures requiring the transfer of funds and the processing of transfer requests;
 - recommending and establishing general fiscal procedures to improve department operations based on cost/benefit studies;
 - reviewing financial reports, expense claims, cost analysis patterns and trends, etc. to determine how projected and budgeted expenditures will generate earned Federal and state funding;
 - reviewing state proposed budgets to determine impact on assigned unit's program revenue and operations; and
 - providing input as to financial implications of projects.

- Manages contracts and contractual compliance by:
 - monitoring and overseeing contract development for annual department contracts and memorandums of understanding;
 - managing the development, distribution, and evaluation of requests for proposal and bid proposals;
 - assisting management with the development and completion of contracts;
 - requesting contract approvals and amendments;
 - supervising claims for payments to contractors;
 - monitoring contract budgets;
 - implementing and updating databases for contract management;
 - developing contract monitoring tools and reports;
 - monitoring quality control, data collection and outcome management;
 - developing auditing guidelines;
 - supervising or performing audits to monitor contractual compliance; and
 - directing the resolution of contract problems for the department and providers.

- Performs grant administration by:
 - monitoring and administering grants and other major sources of funding;
 - preparing grant claims;
 - monitoring grant budgets; and
 - developing and distributing grant budget reports.

- Reviews, analyzes, evaluates and reports upon program accomplishments in financial terms.

- Assists and coordinates audit activities of Federal, state and county auditors.

- Manages and coordinates departmental accounting activities, which may include payroll, general accounting, accounts payable, accounts receivable, and/or asset management functions; manages and supervises the operation of computerized fund/cost accounting systems; plans, analyzes, and coordinates equipment usage and fixed asset inventories.

- Manages administrative services by:
 - developing and implementing policies and procedures;
 - establishing goals, objectives and timelines for projects and workload;
 - planning and coordinating continuous improvement planning to improve efficiency and effectiveness of business and administrative processes;
 - coordinating and integrating activities and business processes with other departments and division;
 - monitoring staffing patterns and making staffing recommendations;
 - planning for growth and future business needs;
 - planning and coordinating data systems, work flow, and space utilization;
 - providing technical guidance, consultation and recommendations for department managers, supervisors and staff regarding policies, practices, procedures, programs actions, or related issues; and
 - maintaining and updating administrative policy and procedures manuals.

- Conducts complex studies involving diverse and intricate operations, programs and services of the department to identify and analyze substantive and/or high visibility problems, to improve the effectiveness and efficiency of complex systems and procedures, and to recommend solutions which often involve extensive changes in established procedures by:

- planning and conducting studies of administrative and operational activities including fiscal operations, budget preparation and control, equipment usage, staffing patterns, work flow, space utilization, affirmative action, and training plans;
 - participating in interdisciplinary program research and/or analysis and the preparation of written/verbal recommendations on a broad range of governmental and managerial problems;
 - receiving and responding to requests for assistance in resolving high profile projects that require immediate attention;
 - researching available computer software to meet operational needs;
 - evaluating the efficiency and effectiveness of the program, operation, procedure, and/or practices under study;
 - analyzing the interactivity with the programs of other departments and with state and Federal agencies and coordinating the issues and impacts with those departments and agencies;
 - ensuring department compliance with applicable laws, rules, regulations, etc. and initiating actions to correct deviations or violations;
 - reviewing work methods and systems to increase service efficiency/effectiveness; and
 - based on analysis of gathered data, developing reports and making recommendations for appropriate action which may include implementing new or revisions to current policies and procedures, and implementing new/changed data collection systems.
- Performs supervisory duties to direct reports in clerical, technical, and/or professional classes such as:
 - assigning work and planning and scheduling staff's work activities and deadlines;
 - establishing standards for acceptable work products and evaluating performance;
 - reviewing work and recognizing employees' work efforts and accomplishments;
 - proposing disciplinary actions;
 - interviewing applicants and recommending selections;
 - providing career development mentoring and recommending training and career development opportunities;
 - ensuring that employees are properly trained and that they are scheduled for or have received required training or needed formal training;
 - providing instruction and/or guidance to employees in handling difficult or complex work problems;
 - reviewing and approving timesheets and requests for leave; and
 - communicating, supporting and enforcing County and Department policies and procedures including those related to equal opportunity and to safety.
 - Reviews and analyzes present, pending and adopted legislation and judicial decisions to determine effect on departmental programs, policies and/or procedures and presents recommendations to implement required changes.
 - Presents findings and recommendations of budget reviews, analysis of expenditure trends, analytical studies, contract and grant monitoring, etc. in oral presentations before management staff, committees, etc., written narrative and statistical reports, agenda items for the Board of Supervisors, etc.

- Represents the department at County and non-County meetings and before boards, commissions and committees; serves on County and non-County committees, advisory groups, and task forces; collaborates with other county departments on cross-functional projects; works with representatives from Federal and state agencies on fiscal management issues; and provides staff support at meetings.
- Performs other duties of a similar nature or level as assigned.

EDUCATION AND EXPERIENCE:

Education: Bachelor's degree or higher from an accredited college or university preferably in Business Administration, Public Administration, Accounting, Finance, or a related field or, if in a related field, have completed nine (9) semester, or thirteen and one half (13.5) quarter units in the field of accounting.

AND

Experience: Two (2) years of responsible professional work experience equivalent to the functions performed by a Staff Analyst within the particular field of expertise required.

LICENSING, CERTIFICATION AND REGISTRATION REQUIREMENTS:

- Applicants are required to possess a valid California Driver's License, Class C.
- All licenses must be kept current while employed in this class.

REQUIRED KNOWLEDGE, SKILLS AND ABILITIES:

Knowledge of:

- Principles and practices associated with governmental accounting, budget preparation, budget administration, and financial analysis.
- Budget preparation principles, practices, and techniques.
- Principles and practices of accounting, cost analysis, and fiscal management.
- Practices and techniques of analytical techniques to include administrative and statistical analysis, statistical report preparation, and graphic presentation of analysis.
- Laws, regulations and policies applicable to work performed and of the assigned organization.
- Standard and accepted principles and practices of supervision, leadership, motivation, team building, organization, training, and conflict resolution.
- Legislative and judicial analysis resources.
- Oral communication techniques to include presentations to groups of various sizes in a positive, inclusive, and motivational manner.
- English composition, spelling, grammar, vocabulary, and punctuation for both written and oral communications.
- Formats and appropriate terminology for written communications such as business correspondence, policies, procedures and narrative reports.

- Basic mathematics for developing, preparing and completing numerical, budgetary, and/or statistical reports.
- Standard office procedures, practices, equipment, personal computers, and software.

Skill and/or Ability to:

- Prepare, analyze, monitor and audit budgets, cost analysis reports, funding proposals and other narrative and statistical reports related to the budget.
- Understand and analyze expenditure reports.
- Analyze financial reports, expense claims, cost analysis patterns and trends, etc.
- Analyze Federal and state proposed budgets to determine impact on assigned unit's program revenue and operations.
- Prepare and monitor contracts and grants according to designated guidelines and regulations.
- Consult with executive level management staff.
- Plan, organize and conduct complex analytical studies involving the professional body of knowledge related to the specific assignment.
- Collect, compile and analyze qualitative information (to include regulations, procedures and technical reference materials) and quantitative data (to include statistical and cost analysis reports); draw logical conclusions; and make appropriate recommendations.
- Review and install changes in work methods, systems and procedures develop and implement operational procedures and plan, coordinate and initiate actions necessary to implement policy and administrative decisions.
- Supervise, evaluate, train, and develop staff and organize their work.
- Comprehend, interpret, explain, and apply a variety of complex laws, regulations, procedures, and other information related to operations and programs of assigned department and use good judgment in their application.
- Research laws, regulations, procedures and/or technical reference materials; analyze, evaluate and interpret the data gathered; draw logical conclusions; develop reasonable and deliverable options, make appropriate recommendations; and implement the resultant change effectively.
- Make decisions, use independent judgment and work with little direct supervision as situations warrant.
- Manage a variety of simultaneous work projects and carry them through to successful completion.
- Interpret political and administrative directions and incorporate them into operational policies and procedures.
- Prepare a variety of written communications to include reports, policies, procedures and comprehensive narrative and statistical reports.
- Communicate information and ideas clearly and concisely, both orally and in writing.
- Work with and speak to various cultural and ethnic individuals and groups in a tactful and effective manner.

- Establish and maintain effective working relationships with those contacted in the performance of required duties, including those who have objectives counter to assigned role.
- Represent the office in meetings with representatives from various County and non-County organizations, with local businesses, with customers, and/or with the general public.
- Maintain accurate records and document actions taken.
- Maintain confidentiality of records and information per pertinent laws/regulations.
- Use modern office equipment to include computers and related software applications which often are unique to the work of the assigned units.

PHYSICAL REQUIREMENTS :

- **Mobility and Dexterity:** Positions in this class typically require stooping, kneeling, reaching, standing, walking, fingering, grasping, feeling (i.e. sense of touch), and repetitive motion.
- **Lifting, Carrying, Pushing and Pulling -- Light Work:** Employees in this class will be exerting up to 20 pounds of force occasionally and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects.
- **Vision:** Positions in this class require the employee to have close visual acuity, with or without correction, to prepare and analyze data and figures, transcribe, view a computer terminal, read, etc. Positions in this class also require employees to have depth perception in order to operate a motor vehicle.
- **Hearing/Talking:** Positions in this class require the employee to perceive the nature of sounds at normal speaking levels with or without correction, and have the ability to receive detailed information through oral communication. Positions in this class require the employee to express or exchange ideas by means of the spoken word.

WORKING CONDITIONS:

- **Office Work:** Employees in this class will most often be working in an office setting.
- **Traffic Hazards:** Employees in this class will be required to operate a vehicle and thus will be subject to traffic hazards while driving.

OTHER REQUIREMENTS:

- **Background Checks:** The County may conduct a background check and a reference check on candidates prior to appointment to a position within this class. The background check may include the State of California Department of Justice, the Federal Bureau of Investigation (FBI), the Child Abuse Central Index (CACI), and criminal checks in any City/County where the applicant has lived, worked or gone to school.
- **Independent Travel:** Incumbents are required to travel independently, for example, to perform work at other work sites, to attend meetings with other County employees, to meet with contractors, to attend meetings with community organizations, etc.
- **Hours of Work:** Incumbents may be required to work weekends, holidays, irregular hours, on-call, and after normal business hours.

CLASS HISTORY AND CLASS INFORMATION:

Date Approved by the Civil Service Commission: December 2000

Date Class Title Added to the Listing of Classes & Salaries by the Board of Supervisors: June 30, 2003

Date(s) Revised: March 2006, April 12, 2017

Class Code:105010