

## CLASSIFICATION SPECIFICATION



**CLASSIFICATION:** Fiscal Analyst  
**ALLOCATION:** County-Wide  
**FLSA STATUS:** Non-exempt  
**UNION AFFILIATION:** YCEA

**ESTABLISHED:** Circa 2000  
**REVISED:** June 2009

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### **JOB SUMMARY:**

Under general supervision, Performs a variety of difficult and complex professional level analytical work to support the operations of County departments, agencies and programs in areas such as the development and administration of the annual budget, financial/fiscal analysis and reporting, grant monitoring and administration; and performs other duties as assigned.

This is the journey level classification in the professional Analyst series.

### **CLASS CHARACTERISTICS:**

This position reports directly to a management classification or a Fiscal and Administrative Supervisor, depending on department assigned. This class is distinguished from the Administrative Services Officer I and II in that the latter has management responsibilities for planning, organizing, coordinating and managing a variety of administrative, budgetary, financial, programmatic, and analytical functions for a designated department. Further, this class is distinguished from Administrative Analyst I/II in that the latter focuses on legislative analysis, evaluation and development of management/administrative policy, and the development and administration of contractual agreements.

### **EXAMPLES OF DUTIES:**

#### **Essential:**

- Performs research, compiles and analyzes information and data regarding a variety of budgetary, financial, and/or fiscal issues; identifies issues and determines analytical standards in consultation with supervisor and/or management; gathers relevant data, information and documentation from a variety of sources; analyzes information and documentation and develops tentative findings; discusses and/or coordinates analysis and tentative findings with supervisor and/or management; develops or assists in developing recommendations and/or course of action; gathers additional information and/or revises methodology as needed.
- Performs analysis for budget development and resource planning; performs or assists in needs analysis and trend analysis based on research and consultation with managers and administrative staff; consults with managers and assists in resource planning and development of annual budget estimates; reviews and analyzes budget requests; compiles information and documentation in preparation of producing reports and/or drafts reports related to budget and resource planning issues.
- Performs analysis for budget administration and/or fiscal/financial reporting; monitors and analyzes expenditures and accounts to ensure compliance with budget parameters; gathers information and prepares related documentation.
- Performs analysis for monitoring of grants received by department; writes or assists in writing grant proposals; analyzes funding parameters and other requirements specified by grantor; monitors departmental expenditures to ensure funding parameters are met; analyzes other criteria to ensure compliance with standards required by grantor, including the timely submission of required statistical, audit and financial reports.
- Analyzes, evaluates, interprets, and implements new and existing governmental accounting pronouncements and technical guidance; identifies problems with, develops and implements changes to current financial policies and procedures.
- Develops and implements procedures to minimize deviations from financial plans; analyzes workflow patterns and presents recommendations to enhance fiscal efficiency and ensure cost efficient government services for the public.
- Prepares detailed quarterly financial reports for various internal and external agencies; prepares analysis for independent auditors as required; ensures the assigned department's fiscal functions comply with applicable Federal, State, and local laws, regulations, and ordinances; acts as departmental liaison with various federal, state and local public agencies and with business, professional and community organizations.

- Builds and maintains positive working relationships with co-workers, County employees, and representatives of community organizations, state/local agencies and the public using principles of good customer service.
- Enters and retrieves data from electronic data processing systems; establishes and updates information, generates reports and correspondence and communicates the information with others.

**Important:**

- Comply with all County equipment and safety policies and procedures, and California Occupational Safety and Health Administration (CalOSHA) rules and regulations.
- May be required to drive a personal or a County motor vehicle.
- Uses standard office equipment, including a computer, in the course of work.
- May direct and review the work of para-professional, technical or support staff on a project or day-to-day basis.

**EMPLOYMENT STANDARDS:**

**Knowledge of:**

- Principles and practices of government budget development and administration, accounting and financial recordkeeping.
- Techniques for working successfully with other employees in a lead capacity.
- Principles and practices of technical and functional supervision and training.
- Federal and State grant procedures and management.
- Federal and State laws, rules and regulations pertaining to governmental financial accounting and budgeting.
- Principles and practices of public and business administration.
- Data collection, analysis and interpretation.
- Application, use, and capabilities of computer software programs used to store data and to prepare reports, spreadsheets, graphs, and informational displays.
- Report writing techniques.

**Skill in:**

- Collecting, compiling, organizing, analyzing and interpreting financial and budgetary data.
- Identifying existing or potential complex operational problems and develop effective resolutions.
- Monitoring budgets to ensure conformance with revenues expectations and expenditure plans.
- Interpreting and applying provisions of Federal, State and local legislations, rules and regulations pertinent to the administration of a public department.
- Performing complex financial and budgetary studies.
- Preparing, reviewing and approving comprehensive analyses and reports, policies, procedures, correspondence and other written materials.
- Explaining, interpreting and applying County and department policies, procedures, rules and regulations.
- Developing logical conclusions from data analysis and making sound recommendations.
- Preparing analytical reports, summaries, manuals, analyses, and displays of information.
- Establishing and maintaining effective working relationships with those contacted in the course of work.
- Organizing and prioritizing work to meet established deadlines.
- Providing direction and training to subordinate staff.
- Planning, directing and reviewing the work of others on a project or day-to-day basis.

**Ability to:**

- Analyze and evaluate financial and budgetary problems and implement effective solutions.
- Prepare and assist in the preparation of multiple, complex departmental and grant budgets.
- Give full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate and not interrupting at inappropriate times.
- Work independently under limited to no supervision, exercise independent judgment, and use initiative.
- Reason both deductively and inductively.
- Coordinate, conduct and facilitate meetings.
- Read, understand, interpret, and apply contracts, ordinances, legislation, policies and procedures,

directives and manuals.

- Communicate clearly, concisely and effectively verbally and in writing.
- Make effective verbal presentations to various groups.
- Establish and maintain effective working relationships in a diverse work force and community.
- Use computerized equipment and applications to accomplish work.

**Physical Demands:** The physical demands and work environment described here are representative of those that must be met by an employee to successfully perform the essential function of the job, with or without accommodation. Prospective employees must complete a pre-employment medical exam (Occupational Group IV) which will measure the ability to:

- See well enough to read fine print and view a computer screen; speak and hear well enough to understand, respond, and communicate clearly in person and on the telephone; independent body mobility sufficient to stand, sit, walk, stoop and bend to access the work environment and a standard office environment; manual dexterity and sufficient use of hands, arms and shoulders to repetitively operate a keyboard and to write; and the ability to sit or walk for prolonged periods of time.

Accommodation may be made for some of these physical demands for otherwise qualified individuals who require and request such accommodation.

**Work Environment:**

- Generally a typical office setting.
- May be required to attend meetings outside the normal business hours.

**QUALIFICATIONS:**

The minimum and preferred requirements are listed below. While the following requirements outline the minimum qualifications the County reserves the right to select applicants for further consideration who demonstrate the best qualifications match for the job. Meeting the minimum qualifications does not guarantee further participation in selection procedures:

**Licenses and Certification:**

- The ability to obtain a valid California Class C driver's license within ten (10) days of employment.

**Special Requirements:**

- Must successfully complete an extensive and thorough background investigation which includes Live Scan fingerprinting and a credit check.

**Education and Experience:**

**MINIMUM:** Bachelor's Degree from an accredited college or university with major coursework in Accounting, Business Administration, Economics, Finance, Public Administration, Statistics, or a field related to the work and two years of para-professional fiscal and/or accounting experience at least equivalent to the County's classification of Senior Accounting Technician.

**PREFERRED:** In addition to the minimum, two years of experience at least equivalent to the County's class of Senior Accounting Technician.

**This class specification lists the major duties and requirements of the job. Incumbent may be expected to perform job-related duties other than those contained in this document.**

Dept Approval: Martha Wilson

Date:

Signature: \_\_\_\_\_

Personnel Approval: Iva Seaberg

Date:

Signature: \_\_\_\_\_