



## FINANCIAL ANALYST

AGENCY/DEPARTMENT:  
Administrative Services/General Services

Approved By HR Director: *Sandra Matthews*  
Date Approved: *5/2/06*  
Date of Last Revision:

Reports to: General Services Director  
Supervises: N/A

**JOB SUMMARY:** Under general supervision, performs fiscal analyses and research duties in support of the preparation and administration of capital and operating budgets; prepares administrative management studies; performs specialized fiscal accounting duties; analyzes budget expenditure and revenue estimates and fund balances and makes budget adjustments; and performs other related work as necessary.

### EXAMPLES OF ESSENTIAL FUNCTIONS:

1. Assists in the coordination and preparation of the City's annual Operating Budget and Capital Improvement Program Budget.
2. Forecasts and evaluates budget expenditure and revenue estimates.
3. Analyzes, reviews, and prepares changes to the budget.
4. Compiles and analyzes budget materials in preparation of the City's detail budget.
5. Prepares comprehensive technical reports representing revenue and expenditure analysis of the City departments' and divisions' current financial position.
6. Advises City departments and divisions on budget problems, policies and procedures; and assists in the maintenance of proper budgetary controls.
7. Evaluates budget proposals and recommends allocations.
8. Conducts analytical studies of complex financial or administrative issues and makes appropriate recommendations.
9. Assists in the fiscal activities of the Redevelopment Agency and Housing Authority, including budget preparation, forecasting, account reconciliation, cash flows, year-end reporting requirement, and expense activity analysis.
10. Reviews and assists in the preparation of the Redevelopment Agency Annual Report.
11. Prepares Statement of Indebtedness Report for the Redevelopment Agency.
12. Assists in the coordination of fiscal activities with other City departments and division, and with outside agencies.
13. Answers questions and provides information to the general public and City or department staff concerning technical or financial issues.

### QUALIFICATION GUIDELINES:

**ANY COMBINATION OF EDUCATION AND/OR EXPERIENCE THAT PROVIDES THE REQUIRED KNOWLEDGE, SKILLS, AND ABILITIES TO PERFORM THE ESSENTIAL FUNCTIONS OF THE POSITION. A TYPICAL COMBINATION INCLUDES:**

**EDUCATION:** Bachelor's degree or equivalent from an accredited college or university in Finance, Accounting, Statistics, Business Administration or related field.

**EXPERIENCE:** Three years of experience in governmental budgetary and finance activities.

**KNOWLEDGE OF:**

- Principles and practices of municipal finance, budget, and accounting.
- Governmental and financial reporting practices and procedures.
- Applicable federal, state, and local laws, codes, and regulations governing municipal, state, and federal accounting and finance.
- Special district, bond, and land-secured financing.
- Research techniques, methods, and procedures.

**ABILITY TO:**

- Analyze and interpret financial and accounting reports.
- Analyze and resolve accounting and financial issues.
- Compile and review administrative and financial data, and make appropriate recommendations based on the analysis.
- Interpret, explain, and comply with applicable laws, rules, and policies.
- Make decisions and exercise resourcefulness in addressing problems.
- Organize, schedule and complete work in accordance with deadlines.
- Operate a personal computer to utilize word processing, spreadsheet, and accounting system applications.
- Operate calculator and standard office equipment.
- Perform arithmetical computations with speed and accuracy.
- Interact and communicate effectively, both orally and in writing.
- Establish, maintain, and foster positive, harmonious and effective working relationships

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**LICENSES:**

- Valid Class C CA driver license.
- Acceptable driving record at the time of appointment and throughout employment.

**CERTIFICATIONS:**

**DESIRABLE:**

- Registration as a Certified Public Accountant, Certified Management Accountant, Certified Internal Auditor, or Certified Information Systems Auditor.

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**FLSA Exemption Status:**

**Employee Unit:** # 1, Confidential

**DOT Program Participant:** No

**Job Family:** General Services