



**CITY OF PETALUMA
CLASS SPECIFICATION**

Date: 8/2/2021
Job Class: 04FIAN
(Prior Job Class: 04ACAN)

Finance Analyst

Summary

Apply principles of accounting to analyze past and present municipal financial operations; assist in estimating future revenues and expenditures to prepare budgets.

Class Characteristics

Direction is provided by a higher-level manager; responsibilities may include the direct or indirect supervision of professional, technical, and/or support staff.

This is the full journey level class in the professional accounting series. Incumbents are expected to perform the full range of professional accounting work in the City. Incumbents are expected to have a thorough knowledge of accounting systems and procedures and the ability to exercise independent judgment and analytical skills within established systems and procedures.

Essential Duties, Skills, and Demands of the Position

The duties, skills, and demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with a disability to perform the essential duties, skills, and demands.

Duties:

Perform general accounting work, including in the areas of bank reconciliation's, fixed assets records, and general ledger activities; maintain, review, and prepare fiscal records.

Assist in year-end preparation prior to City's independent audit.

Assist in the preparation of the annual budget by collecting and analyzing records of past and present operations, trends and costs, estimated and realized revenues, and administrative commitments and obligations incurred to project future revenues and expenditures.

Maintain automated budgeting systems to provide control of expenditures for activities such as legal or training, or to forecast costs for activities such as construction of buildings.

Review expenditures to ensure compliance with the adopted budget.

Perform related duties as assigned.

Skills/Abilities:

Read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations.

Write reports, business correspondence, and procedure manuals.

Effectively present information and respond to questions from groups of managers, clients, customers, and the public.

Calculate figures and amounts such as discounts, interest, commissions, proportions, percentages, and basic statistical formulas.

Apply concepts of basic algebra and geometry.

Define problems, collect data, establish facts, and draw valid conclusions.

Interpret an extensive variety of technical instructions in mathematical or diagram form and deal with several abstract and concrete variables.

Examine and verify financial documents and reports.

Prepare a variety of financial statements, reports, and analyses with supporting statistics and data.

Train and assist less experienced staff.

Operate office equipment including computers and supporting word processing, spreadsheet, and database applications.

Communicate clearly and concisely, both orally and in writing.

Establish and maintain effective working relationships with those contacted in the course of the work.

Physical Demands and Work Environment:

While performing the duties of this job, the employee is regularly required to sit; use the computer keyboard and mouse, use hands to finger, handle or feel; reach with hands and arms; talk or hear; and taste or smell. The employee is occasionally required to stand; walk; and stoop, kneel, crouch, or crawl. The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, distance vision, color vision, peripheral vision, depth perception, and ability to adjust focus. The noise level in the work environment is usually moderate.

Qualifications

Knowledge of:

Fund accounting principles and practices.

Principals of financial administration, including budgeting and reporting.

Basic analytical skills.

Basic data processing principals and their application to financial reporting systems.

Office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.

Education and Experience

Any combination equivalent to the education and experience likely to provide the required knowledge and abilities would be qualifying. A typical way to gain such knowledge and abilities would be:

Education:

A Bachelor's degree with major course work in accounting or a related field.

Experience:

One year of related experience and/or training.

Certifications/Licenses:

Possession of a valid California Class C driver's license.

Finance Analyst

Established: 07/06/99

Resolution #: 99-139 N.C.S.; 2021-123 N.C.S.

Revised: 06/30/06; 08/02/21

Department: Finance

FLSA Status: Non-exempt