



Senior Finance Analyst

Summary

Perform a full range of complex, responsible, and varied professional, analytical, financial, policy, and statistical analyses; perform a variety of complex financial activities, including management of the City's long-range financial plan and other functions, programs, and projects in the Finance Department; may be assigned supervisory duties; and provide highly complex staff assistance to the Director of Finance.

Class Characteristics

General direction is provided by the Director of Finance. Responsibilities include the direct and indirect supervision of lower level professional, technical, and clerical personnel.

This class applies specialized and advanced level knowledge to professional financial work, and has responsibility for major programs or projects within the Finance Department. The incumbent is expected to have a thorough knowledge of financial analysis, exercise independent judgment, and serve as a resource to other staff, departments, outside agencies, and the public.

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:

Plan, coordinate, and perform complex financial, policy, and statistical analyses; prepare financial modeling and forecasts for long-range fiscal stability; analyze alternatives and make effective recommendations.

Plan, organize and manage the City's long-range financial plan and other functions, programs, and projects in the Finance Department.

Develop, prepare, present, and maintain long-range forecasts for all major funds.

Conduct surveys, studies, and research, including rate and fee studies, related to the activities or operation of the City's finance function.

Develop, analyze, review, and present financial plans and policies.

Manage complex projects that cross departments and require City-wide coordination.

Assist in the development, coordination, preparation, and administration of the City's budget, year-end audit, and Comprehensive Annual Financial Report.

Develop and prepare narrative and statistical reports, educational materials, correspondence, and related financial documents and written materials.

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Develop, prepare, and present plans, policies, programs, reports, and recommendations to the City Council, public, and business community.

May supervise assigned professional, technical, and clerical personnel.

Assist, develop, and implement Department goals, objectives, policies, and procedures, and work standards.

Perform related duties as assigned.

Skills/Abilities:

Perform complex and difficult financial, policy, and statistical analysis and develop effective recommendations.

Understand, interpret, and apply financial planning, modeling, and forecasting techniques.

Prepare, evaluate, and present financial plans, policies, complex reports, and rate and fee studies.

Analyze and evaluate issues; identify alternative solutions, and consequences of recommendations.

Conduct thorough surveys, studies, and research.

Collect, evaluate, and interpret varied and complex information and data.

Plan, organize, and manage assigned plans, functions, programs, and projects.

Understand, interpret, and apply financial policies and procedures, and pertinent federal, state, and local laws, codes, and regulations.

Participate in the preparation and administration of the City's budget, year-end audit, and Comprehensive Annual Financial Report.

Supervise professional, technical, and clerical personnel.

Effectively present information to City staff, the City Council, public, and business community.

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, stand, walk; use the computer keyboard and mouse, use hands to finger, handle or feel; reach with hands and arms; talk or hear; and smell. The employee is occasionally required to stoop, kneel, and crouch. 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:

Principles, practices, and methods of financial analyses including forecasting, and long-range financial planning.

Principles, objectives, trends, and techniques of complex financial forecasting.

Principles and practices of budget preparation and administration.

Principles and practices of supervision, training, and personnel management.

Pertinent federal, state, and local laws, codes, and regulations

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 from an accredited college or university with major course work in finance, accounting, economics, or a related field. A Master's degree is highly desirable.

Experience:

Five years of increasingly responsible experience performing financial, budgetary, and fiscal analysis. Work experience in a local government or public agency setting is desirable.

Certifications/Licenses:

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

Established: 10/07/2013

Resolution #: 2013 – 136 N.C.S.; 2021-123 N.C.S.

Revised: 08/02/2021

Department: Finance

FLSA Status: Exempt