



CLASSIFICATION NO. 477

Established: 10/98

Revised: 12/24

FLSA: Exempt

EEO: 2

## **FINANCIAL ANALYST**

### **CLASS CHARACTERISTICS**

Under direction, to provide functional/technical supervision over financial and budgetary activities within County departments and/or large divisions characterized by complex budgets and funding streams; to provide financial and specialized system support; and to perform other work as required.

### **DISTINGUISHING CHARACTERISTICS**

The Financial Analyst is a professional classification responsible for applying well-developed and complex analyses in the areas of finance, budget, and operational planning within a Department or large division. Incumbents perform and lead the complete range of duties related to budget preparation, implementation, and monitoring including budget examination, revenue and expenditure analysis, short and long-range forecasting, report development, and financial modeling and lead implementation/support for department financial applications and processes. Positions in this classification have a direct reporting relationship to senior leadership, act as a financial and budgetary expert, and operate with a high degree of independence.

The Financial Analyst classification differs from those in the Management Analyst Series which has overall administrative analysis responsibilities for several functional areas and are not specifically dedicated to the development and in-depth financial analysis, having independent responsibility over full cycle budgeting, or the evaluation of financial needs and systems. It is further distinguished from the Administrative Services Supervisor classification which is generally responsible for administrative and financial functions in addition to having full supervisory responsibilities.

### **TYPICAL TASKS**

Duties may include but are not limited to the following:

1. Oversees administrative functions related to the financial needs of the assigned department or division; assists in the development and implementation of financial policies and procedures; analyzes legislation which may have financial impact; conducts comprehensive fiscal analysis and reports on the impact of proposed federal and state regulations as required; reviews financial operations and procedures for compliance with statutes, rules and regulations.
2. Develops resources for budget processes and procedures; provides expertise and guidance to management at various levels of the department or division in preparing, administering, and reporting on budgets; interprets and advises on County fiscal and budget policies and procedures; evaluates policies and procedures and makes recommendations for improvement.

3. Monitors revenues and expenditures; develops, prepares, and presents comprehensive financial analysis and forecasting of a department or division's expenditures and revenues and presents appropriate recommendations; analyzes and prepares long-range projections for various operating funds and revenues; prepares and publishes annual comprehensive financial reports, complex financial statements and budget proposals; develops presentations for County Commissioners, department managers, and other boards and committees regarding financial issues and opportunities.
4. Independently prepares, monitors, and audits financial plans and makes recommendations to senior management; investigates, researches, and audits program activities to ensure compliance, ethical treatment of transactions and operations, and overall fiscal solvency; acts as the financial liaison to external auditors and granting agencies; responds to audit requests and coordinates corrections and responses as necessary.
5. Performs financial analysis and statistical computations on rate studies, financial models, and cost allocation plans; analyzes, evaluates, makes recommendations, and prepares requests for fees, rates, and other revenue requests; plans and conducts special studies and analyses of department rate structures; monitors the implementation of rate revisions; analyzes the financial and program impact of rate revisions.
6. Analyzes and evaluates financing needs and resources for capital improvement projects; performs in-depth analysis of inter-fund transactions; serves as a project leader in financial projects and studies of major significance such as performance based budget studies, strategic funding plans, and management performance studies which measure operational and financial performance against plan benchmarks.
7. Develops and utilizes databases, spreadsheets, and related management systems for budget development, financial tracking, and administration; creates and prepares periodic and ad-hoc financial reports and provides in-depth analysis of financial conditions and future trends; prepares and presents complex reports, analyses, and corresponding recommendations; maintains integrity of the internal budget and accounting systems.
8. Provides technical guidance on specialized accounting, financial, and departmental systems that directly impact financial status; troubleshoots, tests, and coordinates the implementation of system enhancements to meet financial business needs; coordinates with Technology Services, central Finance, and/or system vendors on financial system implementations and enhancements.
9. Functions as a technical lead over financial projects and initiatives and provides subject matter expertise to project staff assigned; reviews and monitors the work completed by others; develops and presents training to financial support staff and management to ensure consistency in financial practices and procedures; acts as a project manager to ensure timely completion of financial and budgetary transactions, development, and reporting in compliance with County policies and regulations.
10. Reviews and monitors contracts and grant expenditures; tracks expenditures and activities for compliance with terms and conditions of grants and agreements; prepares grant financial reporting; researches and recommends additional grant funding opportunities to meet operational and financial needs of their assigned area.

## **REQUIRED KNOWLEDGE AND SKILLS**

**Working knowledge of:** Governmental budgeting concepts, principles, and systems; principles of fiscal management and public administration; revenue and expenditure forecasting methods, models, and procedures; Generally Accepted Accounting Principles (GAAP); applicable Federal, State, and local laws; principles, practices, methods, and techniques of financial analysis and forecasting; rate and revenue techniques related to taxes and revenue generation; cost accounting principles and processes; principles, tools, and techniques for project planning and management, and sound business communication; contract and grant administration.

**Some knowledge of:** Principles and techniques of supervision, including evaluation of performance.

**Skill to:** Plan, organize, direct, and lead financial management programs and systems for an entire department or division; evaluate and develop improvements in operations, policies, procedures and methods; develop and monitor complex multi-fund and source budgets; use automated equipment and software for financial analysis and reports; plan, organize, lead, and monitor projects teams; organize and present facts in a clear, concise and logical manner; exercise judgement in responding to and resolving complex issues; identify complex problems and review related information to develop and evaluate options and implement solutions; use mathematical and statistical computations; understand accounting principles and data; communicate effectively, both orally and in writing on administrative and technical issues; establish and maintain effective working relationships with County employees, citizen and business groups, contractors and the public.

## **MINIMUM QUALIFICATIONS**

Minimum qualifications are used as a guide for establishing the minimum experience, education, licensure, and/or certifications required for employment in the classification. The following minimum qualifications are established for this classification. Additional minimum qualifications and special conditions may apply to a specific position within this classification and will be stated on the job announcement.

**Experience:** A minimum of four (4) years of related experience that would provide the required knowledge and skills to perform the responsibilities of this position.

**Licenses/Certifications:** None required.

## **PRE-EMPLOYMENT REQUIREMENTS**

Positions within the County's Criminal Justice agencies must successfully pass an extensive background investigation which may include national fingerprint records check; Some positions within Non-Criminal Justice agencies must successfully pass a criminal history check which may include national or state fingerprint records check.

All positions within the County's Criminal Justice agencies must pass a pre-employment drug test.

Driving may be necessary for County business. For position(s) with occasional/incidental driving, incumbents must possess a valid driver's license. Accommodation requests for an acceptable alternative method of transportation will be reviewed on an individual basis in

compliance with State and Federal legislation. For position(s) with regular driving, incumbent(s) must also possess and maintain an acceptable driving record throughout the course of employment.