



CLASSIFICATION NO. 477
Established: 10/98
FLSA: Exempt
EEO: 2

FINANCIAL ANALYST

CLASS CHARACTERISTICS

Under direction, provides functional/lead work supervision for a large department's fiscal, budget, and management analysis needs; and performs other work as required.

DISTINGUISHING CHARACTERISTICS

The Financial Analyst is responsible for applying well-developed management, fiscal and budgetary analysis skills to a variety of general operational needs and for fiscal and long range planning issues in a large County department. Positions in this classification are responsible for performing the complete range of duties involved in the budget examination, analysis, and preparation; performing revenue and expenditure analysis, including rate studies; performs lead worker duties for comprehensive financial program and projects. Incumbents are considered to be a large department's financial and budgetary expert in the development of program definitions, goals and quantifiable measuring devices; determination of approaches to be used in conducting major studies and financing department operations, assigning specific aspects to project members, and review of work accomplished.

The Financial Analyst classification differs from those in the Administrative Services classification series which have overall administrative responsibilities for several functional areas and are not specifically dedicated to the development and in-depth financial analysis and evaluation of financial needs and systems for a large department.

TYPICAL TASKS

Duties may include but are not limited to the following:

1. Oversees administrative functions related to the financial needs of the department; assists in the development and implementation of a department's financial policies and procedures; analyzes legislation which may affect departmental finances; reviews division operations for compliance with statutes, rules and regulations.
2. Monitors department revenues and expenditures; may prepare and administer the budget for a specific section or division within the department; develops, prepares, and presents comprehensive financial analysis and forecasting of a department's expenditures and revenues and presents appropriate recommendations; analyzes and prepares long-range projections for various department/sections operating funds and revenues; coordinates fiscal operations and systems with County Finance.
3. Analyzes, evaluates, makes recommendations, and prepares requests for fee, 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.

4. Analyzes and evaluates financing needs and resources for a department's capital improvement projects; conducts comprehensive fiscal analysis and reports on the impact of proposed federal and state regulations; performs in-depth analysis of inter-fund transactions. Serves as a department project leader in financial projects of major significance for financial and management studies such as performance based budget studies, strategic funding plans, and management performance studies which measure operational and financial performance against plan benchmarks; works directly with, and serves as the department liaison with outside consultants; reviews and monitors the work of others; takes primary responsibility for timely completion and quality of studies.
5. Leads the work of assigned financial support staff; trains employees and assists in evaluating work performance; assigns and reviews work; may recommend disciplinary action.
6. Reviews and monitors contracts and grant expenditures; may serve as department liaison with granting agencies and external auditors.
7. Makes presentations to County Commissioners, department managers, and other boards and committees regarding financial issues and opportunities.

REQUIRED KNOWLEDGE AND SKILLS

Working knowledge of: Governmental budgeting concepts, principles, and systems; principles of public administration; financial research and forecasting techniques, measurements, methods and procedures; rate and revenue techniques related to taxes and revenue generation; cost accounting principles and processes; contract and grant administration.

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

Skill to: Plan, organize, direct, and lead financial management programs and systems for an entire department; 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; 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.