

~~COUNTY OF SOLANO
STAFF ANALYST~~

Rev: 03/06

**COUNTY OF SOLANO
CLASS SPECIFICATION
STAFF ANALYST**

Effective Date of Revision: XX/XX/XXXX

Date of this Add/Delete Draft: 07-08-16

DEFINITION

~~Reviews, analyzes, audits and monitors budgets, expenditures, contracts, and other items; conducts analytical studies involving the operations and programs of the department served to develop and/or improve systems and procedures; and supports departmental operations, programs and/or services including fiscal operations, productivity improvement, system design.~~

CLASS SUMMARY:

This is the journey level class in the Staff Analyst series. Under general supervision, the Staff Analyst performs a variety of financial management roles to include preparing, reviewing, analyzing, auditing and monitoring budgets, expenditures, grants, and contracts; and conducts analytical studies involving the operations, programs and services of the department served to develop and/or improve systems and procedures and to recommend and implement solutions. Incumbents may provide supervision over a small clerical or technical support staff, however, financial management and analytical problem-solving are the major components of this class.

CLASS CHARACTERISTICS

~~This is the fully qualified, professional journey level class in the Staff Analyst series. Incumbents are assigned to a division or multiple units in a division for which they perform budget analysis/preparation and administrative/operational consultation. Although much of the time is spent in budget preparation and expenditure review, incumbents provide consultation to the assigned division on a broad range of issues. This series is characterized by the responsibility to plan, organize and perform professional level staff work serving as an expert or resource in the assigned area of responsibility. Incumbents are responsible for identifying and analyzing complex problems that cover the full scope of organizational activities in the assigned area(s) as well as recommending and implementing solutions. Incumbents may provide supervision over a small clerical or technical support staff. However, budgetary and analytical problem solving is the major component of this class concept. This class is distinguished from Staff Analyst (Senior) by a combination of the amount of guidance received, the diversity, complexity and breadth of projects assigned and the level of supervision provided over technical and professional level staff. Positions in this class are flexibly staffed from the entry to the journey level, are normally filled by advancement from the entry level or, if filled from the outside, require equivalent experience.~~

DISTINGUISHING CHARACTERISTICS:

This class is distinguished from the:

- **Staff Analyst (Senior)** class which is the advanced journey class of the Staff Analyst series and exceeds the level of the Staff Analyst class by a combination of factors: the amount of guidance received; the level and complexity of the fiscal management duties due to, for example, the size, multi-year scope, and/or accounting basis of the budget, the variety and funding ratio of funding sources, the fluctuations in revenue generation and/or cost reimbursements, the difficulty in performing cost analyses involving a variety of types of expenditures, the complexity of program activities which are impacted by changing laws and regulations, Federal and state fiscal interfaces, the size and complexity of grants and contracts and the difficulty in ensuring grant parameters and contract provisions are met; the diversity, complexity and breadth of projects due to, for example, the interactivity with other organizations; the level of the organization to which assigned; and the overall program responsibility; and the
- **Staff Analyst (Entry)** class which is the entry level class of the Staff Analyst series and which is flexibly staffed to the journey level Staff Analyst class; an employee in this class initially works under close supervision performing the less complex projects that are narrower in scope or specific portions of larger projects, progressing to general supervision as the incumbent becomes able to independently perform the full range of duties associated with this level.

SUPERVISION RECEIVED AND EXERCISED

~~Receives general supervision from the assigned supervisory position, and may receive technical oversight from a higher level analyst.~~

Supervision is provided by the supervisor of the work unit.

~~May provide supervision to clerical or technical staff.~~

Employees in this class may supervise employees in clerical and/or technical/paraprofessional classes.

~~**EXAMPLES OF DUTIES** -- Duties may include but are not limited to the following:~~

ESSENTIAL DUTIES: This class specification represents the core area of responsibilities; specific position assignments will vary depending on the needs of the department.

[Note: The duties from the current class specification have been bulleted and placed in a different order so that they generally precede the similar duty in the proposed class specification.]

- Performs a variety of financial management duties:

~~• Develops budgets based on analysis of data collected including impact on service levels and operations and/or information required by the funding source; controls specific departmental purchases and expenditures; reviews financial data on an ongoing basis to assure conformance with established guidelines; recommends and establishes general fiscal procedures to improve department operations based on cost/benefit studies.~~

- Prepares, reviews, analyzes, audits and monitors budgets by:
 - developing budgets based on analysis of data collected including impact on service levels and operations and/or information required by the funding source;
 - reviewing revenue projections, revenue trends, time studies, enacted or future legislation, etc. and analyzing their impact on projected budgets; and
 - developing and providing budgetary information to be used for feasibility studies, project/program development, and analysis of program viability, effectiveness and efficiency.
- ~~Reviews actual expenditures, expenditure patterns, and projections of assigned department/division for conformance with respective budgets.~~
- Reviews and analyzes fiscal aspects of programs by:
 - recommending and establishing general fiscal procedures to improve department operations based on cost/benefit studies;
 - analyzing financial reports, expense claims, cost analysis patterns and trends, etc. to determine how projected and budgeted expenditures will generate earned Federal and state funding;
 - reviewing financial data on an ongoing basis to assure conformance with established guidelines;
 - analyzing Federal and state proposed and adopted legislation and budgets to determine impact on assigned unit's program revenue and operations; and
 - providing input as to financial implications of projects.
- ~~Recommends and establishes contract forms and procedures; develops, reviews and makes recommendations concerning bid proposals and agreements, interprets contract terms and monitors adherence to same; recommends solutions to contractual problems; researches operational and fiscal requirements for specific grant proposals; prepares grant applications and all subsequent follow-up; recommends and monitors procedures for grant implementation.~~
- Prepares, reviews, analyzes, audits and monitors contracts by:
 - recommending and establishing contract forms and procedures;
 - developing, reviewing and making recommendations concerning bid proposals and agreements, interpreting contract terms and monitoring adherence to same; and
 - recommending solutions to contractual problems.
- Prepares, reviews, analyzes, audits and monitors grants by:
 - researching operational and fiscal requirements for specific grant proposals;
 - preparing grant applications, claims and all subsequent follow-ups and recommending and monitoring procedures for grant implementation; and
 - reviewing data submitted by grantor for adherence to scope of work requirements to ensure objectives, goals and compliance to grant requirements are achieved.
- Presents findings and recommendations in oral presentations, written narrative and statistical reports, agenda items for the Board of Supervisors, etc.

- ~~• Receives and responds to requests for assistance in resolving high profile projects that require immediate attention; develops and provides budgetary information to be used for feasibility studies, project/program development, and analysis of program viability, effectiveness and efficiency; provides input as to financial implications of projects; participates in interdisciplinary program research and/or analysis and the preparation of written/verbal recommendations on a broad range of governmental and managerial problems.~~
- ~~• Plans and conducts studies of administrative and operational activities including fiscal operations, budget preparation and control, equipment usage, staffing patterns, work flow, space utilization, affirmative action, and training plans; analyzes need for, recommends and may implement new/changed data collection systems; develops reports and recommendations for appropriate action based on an analysis of gathered data.~~
- ~~• Reviews work methods and systems to increase service efficiency/effectiveness; develops and recommends various policies and procedures; develops written procedures to implement adopted policy, changed regulation or to clarify and describe standard practices; researches available computer software to meet operational needs.~~
- Conducts studies involving the operations, programs and services of the department to identify and analyze problems as well as to recommend and implement solutions by:
 - planning and conducting studies of administrative and operational activities including fiscal operations, budget preparation and control, equipment usage, staffing patterns, work flow, service delivery, space utilization, affirmative action, and training plans;
 - participating in interdisciplinary program research and/or analysis and the preparation of written/verbal recommendations on a broad range of governmental and managerial problems;
 - receiving and responding to requests for assistance in resolving high profile projects that require immediate attention;
 - researching available computer software to meet operational needs;
 - evaluating the efficiency and effectiveness of the program, operation, procedure, and/or practices under study;
 - ensuring department compliance with applicable laws, rules, regulations, etc. and initiating actions to correct deviations or violations;
 - reviewing work methods and systems to increase service efficiency/effectiveness; and
 - based on analysis of gathered data, developing reports and making recommendations for appropriate action which may include implementing new or revisions to current policies and procedures, and implementing new/changed data collection systems.
- ~~• May supervise clerical and technical personnel engaged in administrative support activity.~~
- May perform supervisory duties to direct reports in clerical and/or technical/paraprofessional classes such as:
 - assigning work and planning and scheduling staff's work activities and deadlines;
 - establishing standards for acceptable work products and evaluating performance;
 - reviewing work and recognizing employees' work efforts and accomplishments;
 - proposing disciplinary actions;

- interviewing applicants and recommending selections;
- providing career development mentoring and recommending training and career development opportunities;
- ensuring that employees are properly trained and that they are scheduled for or have received required training or needed formal training;
- providing instruction and/or guidance to employees in handling difficult or complex work problems;
- reviewing and approving timesheets and requests for leave; and
- communicating, supporting and enforcing County and Department policies and procedures including those related to equal opportunity and to safety.

~~• Reviews present and pending legislation to determine effect on departmental organizations and presents recommendations in verbal or written form; prepares a variety of reports, records, correspondence and other documents.~~

- Reviews present and pending legislation and judicial decisions to determine effect on departmental organizations and presents recommendations to implement required changes.
- Performs other duties of a similar nature or level as assigned.

JOB RELATED AND ESSENTIAL QUALIFICATIONS

Experience and Education/Training

EDUCATION AND EXPERIENCE:

~~**Education/Training:** Bachelor's degree is required from an accredited college or university, preferably in Business Administration, Public Administration, Accounting, Finance or a related field.~~

- **Education:** Bachelor's degree or higher from an accredited college or university preferably in Business Administration, Public Administration, Accounting, Finance, or a related field or, if in a different related field, have completed nine (9) semester, or thirteen and one half (13.5) quarter units in the field of accounting.

AND

- **Experience:** One (1) year of responsible professional work experience equivalent to the functions performed by a Staff Analyst (Entry) within the particular field of expertise required.

SPECIAL REQUIREMENTS

~~Possession of or ability to obtain a valid Class C California driver's license may be required.~~

LICENSING, CERTIFICATION AND REGISTRATION REQUIREMENTS:

- Applicants are required to possess a valid California Driver's License, Class C.

Note: All licenses must be kept current while employed in this class.

REQUIRED KNOWLEDGE, SKILLS AND ABILITIES:

[Note: The KSAs from the current class specification are bulleted and have been placed in a different order so that they generally precede the similar KSA in the proposed class specification.]

Knowledge of:

- ~~• Budget preparation principles, practices, and techniques; principles of budgeting, accounting, and organization.~~
- Budget preparation principles, practices and techniques.
- Principles and practices of accounting, cost analysis, and fiscal management.
- ~~• Principles and practices applicable to specific assignment (e.g., public administration management, budgeting, staffing, automation, systems analysis, industrial engineering, etc.).~~
- ~~• Analytical techniques including data collection and presentation methods.~~
- Practices and techniques of analytical techniques to include administrative and statistical analysis, statistical report preparation, and graphic presentation of analysis.
- ~~• Policies, procedures, and activities of the County and departmental practices as they pertain to the performance of duties; agency goals and purposes; terminology, principles, and methods utilized within the department.~~
- ~~• Laws, standards, rules, and regulations pertaining to specific duties and responsibilities of the position.~~
- Laws, regulations and policies applicable to work performed and of the assigned organization.
- Legislative and judicial analysis resources.
- ~~• Supervisory principles and practices.~~
- Standard and accepted principles and practices of supervision, leadership, motivation, team building, organization, training, and conflict resolution.
- Oral communication techniques to include presentations to groups of various sizes in a positive, inclusive, and motivational manner.
- English composition, spelling, grammar, vocabulary, and punctuation for both written and oral communications.
- Formats and appropriate terminology for written communications such as business correspondence, policies, procedures and narrative reports.
- Basic mathematics for developing, preparing and completing numerical, budgetary, and/or statistical reports.
- Standard office procedures, practices, equipment, personal computers, and software.

Skill and/or Ability to:

- ~~Prepare, analyze, monitor, and audit budgets, funding proposals and narrative and statistical reports.~~
- Prepare, analyze, monitor and audit budgets, cost analysis reports, funding proposals and other narrative and statistical reports related to the budget.
- Understand and analyze expenditure reports.
- Analyze financial reports, expense claims, cost analysis patterns and trends, etc.
- Analyze Federal and state proposed budgets to determine impact on assigned unit's program revenue and operations.
- Prepare and monitor contracts and grants according to designated guidelines and regulations.
- Plan, organize and conduct analytical studies involving the professional body of knowledge related to the specific assignment.
- ~~Collect, compile and analyze qualitative and quantitative data.~~
- Collect, compile and analyze qualitative information (to include regulations, procedures and technical reference materials) and quantitative data (to include statistical and cost analysis reports).
- Review and install changes in work methods, systems and procedures develop and implement operational procedures and plan, coordinate and initiate actions necessary to implement policy and administrative decisions.
- Supervise, evaluate, train, and develop staff and organize their work.
- ~~Understand, interpret and explain laws, regulations and policies governing program operations.~~
- Understand, interpret and apply applicable laws, regulations and policies and use good judgment in their application.
- Research laws, regulations, procedures and/or technical reference materials; analyze, evaluate and interpret the data gathered; draw logical conclusions; develop reasonable and deliverable options, make appropriate recommendations; and implement the resultant change effectively.
- ~~Organize and prioritize work assignments.~~
- Manage a variety of simultaneous work projects and carry them through to successful completion.
- Interpret political and administrative directions and incorporate them into operational policies and procedures.
- Prepare a variety of written communications to include reports, policies, procedures and comprehensive narrative and statistical reports.
- ~~Communicate effectively both verbally and in writing with people of diverse socio-economic backgrounds and temperaments; work effectively with others who have objectives counter to assigned role.~~
- Communicate information and ideas clearly and concisely, both orally and in writing.
- Work with and speak to various cultural and ethnic individuals and groups in a tactful and effective manner.
- ~~Establish and maintain cooperative working relationships; secure cooperation and teamwork among professional and/or support staff.~~

- Establish and maintain effective working relationships with those contacted in the performance of required duties.
- Represent the office in meetings with representatives from various County and non-County organizations, with local businesses, with customers, and/or with the general public.
- Maintain accurate records and document actions taken.
- Maintain confidentiality of records and information per pertinent laws/regulations.
- ~~Operate office equipment including a personal computer, copy and fax machines and printers.~~
- Use modern office equipment to include computers and related software applications which often are unique to the work of the assigned units.

Skills to:

Ability to:

~~Make decisions and independent judgments.~~

~~Consult with executive level management.~~

~~Determine and evaluate levels of achievement and performance.~~

ADA COMPLIANCE

~~**Physical Ability:** Tasks involve the ability to exert light physical effort in sedentary to light work, but which may involve some lifting, carrying, pushing and/or pulling of objects and materials of light weight (5-10 pounds). Tasks may involve extended periods of time at a keyboard or workstation. Tasks may involve extended periods of time at a keyboard or workstation.~~

~~**Sensory Requirements:** Some tasks require visual perception and discrimination. Some tasks require oral communications ability.~~

~~**Environmental Factors:** Tasks may involve exposure to adverse environmental conditions, such as dirt, dust, pollen, odors, fumes, violence, disease, pathogenic substances, and traffic hazards.~~

PHYSICAL REQUIREMENTS :

- Mobility and Dexterity: Positions in this class typically require stooping, kneeling, reaching, standing, walking, fingering, grasping, feeling (i.e. sense of touch), and repetitive motion.
- Lifting, Carrying, Pushing and Pulling -- Light Work: Employees in this class will be exerting up to 20 pounds of force occasionally and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects.
- Vision: Positions in this class require the employee to have close visual acuity, with or without correction, to prepare and analyze data and figures, transcribe, view a computer terminal, read, etc. Positions in this class also require employees to have depth perception in order to operate a motor vehicle.
- Hearing/Talking: Positions in this class require the employee to perceive the nature of sounds at normal speaking levels with or without correction, and have the ability to receive detailed

information through oral communication. Positions in this class require the employee to express or exchange ideas by means of the spoken word.

WORKING CONDITIONS:

- Office Work: Employees in this class will most often be working in an office setting.
- Traffic Hazards: Employees in this class will be required to operate a vehicle and thus will be subject to traffic hazards while driving.

SUPPLEMENTAL INFORMATION

~~Candidates for positions in this class may be required to pass a background investigation in accordance with applicable law, regulation and/or policy.~~

~~Positions allocated to this class may require specific knowledge and abilities.~~

OTHER REQUIREMENTS:

- Background Checks: The County may conduct a background check and a reference check on candidates prior to appointment to a position within this class. The background check may include the State of California Department of Justice, the Federal Bureau of Investigation (FBI), the Child Abuse Central Index (CACI), and criminal checks in any City/County where the applicant has lived, worked or gone to school.
- Independent Travel: Incumbents are required to travel independently, for example, to perform work at other work sites, to attend meetings with other County employees, to meet with contractors, to attend meetings with representative from other counties and with state and Federal agencies, etc.
- Hours of Work: Incumbents may be required to work weekends, holidays, irregular hours, on-call, and after normal business hours.

Director of Human Resources

~~Established Date: May 2000~~

~~BOS Date: June 30, 2003~~

~~CSC Date: March 2006~~

CLASS HISTORY AND CLASS INFORMATION:

- Date Approved by the Civil Service Commission: May 2000
- Date Class Title Added to the Listing of Classes & Salaries by the Board of Supervisors: June 30, 2003

- [Date\(s\) Revised: March, 2006](#)
- [Date\(s\) Retitled and Previous Titles of the Class:](#)
- [Class Code:](#)

I:\Classification\Class Specs\Current Class Specs\Staff Analyst 3-8-06.doc