

**COUNTY OF SOLANO
STAFF ANALYST (SENIOR)**

Rev. 03/06

**COUNTY OF SOLANO
CLASS SPECIFICATION
STAFF ANALYST (SENIOR)**

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; plans coordinates, and conducts complex analytical studies involving operations and programs of an assigned department/division in order to develop/ and/or improve systems and procedures; oversees and participates in professional level work involving fiscal management, financial analysis, billing/collections, analysis of laws and policies, regulatory compliance, implementation of policies/procedures, and/or contract management and compliance.~~

CLASS SUMMARY:

This is the advanced journey level class in the Staff Analyst series. Under direction, the Staff Analyst (Senior) performs most, if not all, of the following:

(1) performs a variety of complex financial management roles to include (a) advising and assisting management of the department served by preparing and supplying financial management advice required to make management decisions, (b) reviewing, analyzing, evaluating and reporting upon program accomplishments in financial terms, and (c) assisting management in exercising effective control over the financial programs and resources of the organization by preparing, reviewing, analyzing, and monitoring budgets, expenditures, grants, contracts, etc. which are considered complex 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;

(2) plans, schedules and conducts complex analytical studies involving diverse and intricate operations, programs and services of the department in order to develop and/or improve the effectiveness and efficiency of complex systems and procedures and to recommend solutions which often involve extensive changes in established procedures;

(3) manages administrative services for the entire department or one or more divisions of a large department;

(4) supervises a small clerical, technical and/or professional staff;

(5) analyzes legislative changes and judicial decisions for impact on department programs;

(6) prepares a variety of written reports and makes oral presentations; and

(7) represents the department at county, state and Federal meetings.

CLASS CHARACTERISTICS

~~This class performs professional level staff work in support of departmental operations, programs, and/or services. Positions are responsible for providing analytical support to department management relative to diverse programs and complex fiscal matters, and for recommending and implementing solutions to sensitive interdepartmental and intergovernmental matters.~~

~~This level is distinguished from the journey level Staff Analyst by performing the more complex work of the unit, by supervising or providing technical oversight over a small professional support staff and/or technical and clerical support staff, and/or by performing all of the Staff Analyst related duties for a large and complex department.~~

DISTINGUISHING CHARACTERISTICS:

This class is distinguished from the:

- Staff Analyst class which is the journey level class in the Staff Analyst series and which performs duties of a less complex nature as indicated by a combination of: the amount of guidance received; the level and lesser complexity and diversity of the budget, funding sources, and expenditures; the limited diversity, complexity and breadth of programs being studied; the level of the organization to which assigned; and the limited overall program responsibility; and the
- Policy and Financial Analyst class in that the employees in this class ~~This classification is distinguished from the Policy and Financial Analyst in that the latter~~ exhibit a higher level of responsibility in program oversight, monitoring, understanding, justifying, and articulating program needs.

SUPERVISION RECEIVED AND EXERCISED

~~Receives general supervision from assigned supervisory/management personnel within the assigned department.~~

Direction is provided by the supervisor of the work unit.

~~May provide supervision to professional, clerical and/or technical support staff.~~

Employees in this class may supervise employees in clerical, technical and/or professional 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 that support the provision of financial management advice and support to department management:

~~• Manages fiscal and budget activities; maintains fiscal and budgetary integrity and compliance of department programs; coordinates budget preparation, administers approved budgets, and monitors expenditures; projects year-end expenditures and revenues; provides financial analysis to maximize revenues and minimize expenditures; recommends and implements solutions to improve revenue generation for department programs; analyzes costs, projects trends in expenditures, and projects potential revenues based on expenditure trends; justifies projections and explains variances; analyzes and reports to management the impact of equity adjustments, increases in fixed costs, or other actions; coordinates with appropriate staff regarding revenue accruals, encumbrances, and expenditure accruals; determines over-expenditures requiring transfer of funds and processes transfer requests; coordinates/participates in year-end closing process; develops financial reports, schedules, spreadsheets, and forms; submits budgets and financial reports to appropriate agencies; coordinates audit activities.~~

- Manages budget activities by:

- developing the budget for an entire department or, in larger departments, the most complex division budgets based on analysis of data collected including impact on service levels and operations and/or information required by the funding source;
- providing financial analysis to maximize revenues and minimize expenditures; projecting year-end expenditures and revenues;
- developing and providing budgetary information to be used for feasibility studies, project/program development, and analysis of program viability, effectiveness and efficiency; and
- submitting budgets and financial reports to appropriate agencies.

~~Interprets, explains, and ensures departmental compliance with all applicable laws, rules, regulations, standards, safety practices, policies, and procedures; researches laws and regulations as needed; initiates any actions necessary to correct deviations or violations.~~

~~Manages billing/collections; reviews/analyzes billing practices and procedures to ensure maximization of department revenues and compliance with state/federal regulations, and recommends/implements appropriate changes; supervises or performs audits to ensure accurate billing and documentation for services provided; coordinates implementation of billing software systems and monitors software performance; resolves billing problems.~~

- Monitors, reviews, and analyzes fiscal aspects of programs by:

- reviewing revenue projections, revenue trends, time studies, the impact of enacted or future legislation, etc. and their impact on projected budgets;
- recommending and implementing solutions to improve revenue generation for department programs;
- analyzing costs and projecting potential revenues based on expenditure trends;
- analyzing and reporting to management the impact of equity adjustments, increases in fixed costs, or other actions;
- coordinating with appropriate staff regarding revenue accruals, encumbrances, and expenditure accruals;

- determining over-expenditures requiring the transfer of funds and the processing of transfer requests;
- recommending and establishing general fiscal procedures to improve department operations based on cost/benefit studies;
- reviewing 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 state proposed budgets to determine impact on assigned unit's program revenue and operations; and
- providing input as to financial implications of projects.

~~Manages contracts and compliance; monitors and oversees contract development for annual department contracts and memorandum of understanding; manages development, distribution, and evaluation of requests for proposals and bid proposals; assists management with development and completion of contracts; requests contract approvals and amendments; supervises claims for payments to contractors and monitors contract budgets; implements and updates database for contract management; develops contract monitoring tools and reports; monitors quality control, data collection, and outcome management; develops auditing guidelines; supervises or performs audits to monitor contractual compliance; directs resolution of contract problems for divisions and providers.~~

- Manages contracts and contractual compliance by:
 - monitoring and overseeing contract development for annual department contracts and memorandums of understanding;
 - managing the development, distribution, and evaluation of requests for proposal and bid proposals;
 - assisting management with the development and completion of contracts;
 - requesting contract approvals and amendments;
 - supervising claims for payments to contractors;
 - monitoring contract budgets;
 - implementing and updating databases for contract management;
 - developing contract monitoring tools and reports;
 - monitoring quality control, data collection and outcome management;
 - developing auditing guidelines;
 - supervising or performing audits to monitor contractual compliance; and
 - directing the resolution of contract problems for the department and providers.

Performs grant administration; monitors and administers grants and other major sources of funding; prepares grant claims and monitors grant budgets; develops and distributes grant budget reports; assists state/federal auditors with grant audits.

- Performs grant administration by:
 - monitoring and administering grants and other major sources of funding;
 - preparing grant claims;
 - monitoring grant budgets; and
 - developing and distributing grant budget reports.
- Reviews, analyzes, evaluates and reports upon program accomplishments in financial terms.
- Assists and coordinates audit activities of Federal, state and county auditors.

- Manages and coordinates departmental accounting activities, which may include payroll, general accounting, accounts payable, accounts receivable, and/or asset management functions; manages and supervises the operation of computerized fund/cost accounting systems; plans, analyzes, and coordinates equipment usage and fixed asset inventories.
- ~~• Manages administrative services; develops and implements policies and procedures; establishes goals, objectives, and timelines for projects and workload; plans and coordinates continuous improvement planning to improve efficiency and effectiveness of business and administrative processes; coordinates and integrates activities and business processes with other departments and divisions; monitors staffing patterns and makes staffing recommendations; plans for growth and future business needs; conducts operational studies and feasibility studies; assists with development of agenda items; plans and coordinates data systems, work flow, and space utilization; maintains and updates administrative policy/procedure manuals.~~
- ~~• Provides technical guidance, consultation, and recommendations to department managers, supervisors, and staff regarding policies, practices, procedures, programs, actions, or related issues.~~
- Manages administrative services by:
 - developing and implementing policies and procedures;
 - establishing goals, objectives and timelines for projects and workload;
 - planning and coordinating continuous improvement planning to improve efficiency and effectiveness of business and administrative processes;
 - coordinating and integrating activities and business processes with other departments and division;
 - monitoring staffing patterns and making staffing recommendations;
 - planning for growth and future business needs;
 - planning and coordinating data systems, work flow, and space utilization;
 - providing technical guidance, consultation and recommendations for department managers, supervisors and staff regarding policies, practices, procedures, programs actions, or related issues; and
 - maintaining and updating administrative policy and procedures manuals.
- ~~• Assists in evaluating efficiency and effectiveness of department programs, operations, procedures, practices, and resource management; recommends and/or implements improvements in programs and operational procedures as needed.~~
- Conducts complex studies involving diverse and intricate operations, programs and services of the department to identify and analyze substantive and/or high visibility problems, to improve the effectiveness and efficiency of complex systems and procedures, and to recommend solutions which often involve extensive changes in established procedures by:
 - planning and conducting 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;

- 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;
 - analyzing the interactivity with the programs of other departments and with state and Federal agencies and coordinating the issues and impacts with those departments and agencies;
 - 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.
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- ~~Supervises, directs, and evaluates staff as assigned, processing employee concerns and problems, directing work, counseling, disciplining, and completing employee performance appraisals; conducts interviews and makes hiring recommendations; coordinates daily work activities; organizes, prioritizes, and assigns work; monitors status of work in progress and inspects completed work; confers with assigned staff, assists with complex/problem situations, and provides technical expertise.~~
 - Performs supervisory duties to direct reports in clerical, technical, and/or professional 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.

- ~~• Analyzes existing/proposed state/federal laws and policies; determines the impact of existing/proposed legislation on fiscal or administrative operations; plans for implementation of new legislation and addresses compliance issues.~~
- Reviews and analyzes present, pending and adopted legislation and judicial decisions to determine effect on departmental programs, policies and/or procedures and presents recommendations to implement required changes.
- ~~• Prepares, receives, completes, processes, and maintains a variety of forms, reports, correspondence, logs, and records.~~
- Presents findings and recommendations of budget reviews, analysis of expenditure trends, analytical studies, contract and grant monitoring, etc. in oral presentations before management staff, committees, etc., written narrative and statistical reports, agenda items for the Board of Supervisors, etc.
- ~~• Attends meetings, serves on committees, and makes presentations as needed; represents the department at meetings; provides staff support for committee meetings as needed, which may include preparing agendas, recording/preparing minutes, or distributing documentation.~~
- Represents the department at County and non-County meetings and before boards, commissions and committees; serves on County and non-County committees, advisory groups, and task forces; collaborates with other county departments on cross-functional projects; works with representatives from Federal and state agencies on fiscal management issues; and provides staff support at meetings.
- ~~• Maintains a comprehensive, current knowledge of applicable laws, regulations, policies, and procedures; reads professional literature; attends workshops and training sessions as appropriate.~~
- Performs other duties of a similar nature or level as assigned.

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 closely 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 related field, have completed nine (9) semester, or thirteen and one half (13.5) quarter units in the field of accounting.

AND

Experience:

~~Two (2) years of experience as a Staff Analyst or its equivalent in a public or private agency, to include experience involving office administration, accounting, personal computer operations, and specific experience involving area of assignment (such as financial/budget analysis, budget administration, auditing, cost accounting, contract management, human resources administration, safety/risk management, program coordination, and/or supervision).~~

- Experience: Two (2) years of responsible professional work experience equivalent to the functions performed by a Staff Analyst 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.
- All licenses must be kept current while employed in this class.

JOB RELATED AND ESSENTIAL QUALIFICATIONS

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:

- ~~Principles of budgeting, accounting, and organization.~~
- Principles and practices associated with governmental accounting, budget preparation, budget administration, and financial analysis.
- Budget preparation principles, practices, and techniques.
- ~~Principles and practices applicable to specific assignment (e.g., public administration management, budgeting, staffing, automation, systems analysis, industrial engineering, etc.).~~
- ~~Principles and practices associated with governmental accounting, budget preparation, budget administration, and financial analysis.~~
- Principles and practices of accounting, cost analysis, and fiscal management.
- ~~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.
- ~~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.

~~• Principles and practices of employee supervision and training.~~

- Standard and accepted principles and practices of supervision, leadership, motivation, team building, organization, training, and conflict resolution.
- Legislative and judicial analysis resources.
- 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.

~~• Computers and software programs typically used in the position; computerized data collection, retrieval, and analysis.~~

- Standard office procedures, practices, equipment, personal computers, and software.

~~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.~~

~~Standard operating procedures and administrative systems used in local public sector agencies.~~

Skills to:

Ability to:

Skill and/or Ability to:

- ~~• Review and prepare budgets, funding proposals, and narrative and statistical reports; understand and analyze expenditure reports;~~
- ~~• Perform required mathematical calculations.~~
- 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.
- Consult with executive level management staff.
- Plan, organize and conduct complex analytical studies involving the professional body of knowledge related to the specific assignment.

- Collect, compile and analyze qualitative information (to include regulations, procedures and technical reference materials) and quantitative data (to include statistical and cost analysis reports); draw logical conclusions; and make appropriate recommendations.
- ~~• Review and implement changes in work methods, systems, and procedures.~~
- ~~• Develop and implement operational procedures; interpret political and administrative direction and incorporate into operational policy and procedure.~~
- 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 and lead the work of others engaged in departmental projects/activities; plan, supervise, instruct, train, and direct the work of subordinates; effectively delegate responsibility and authority to others; determine and evaluate levels of achievement and performance of subordinates.~~
- Supervise, evaluate, train, and develop staff and organize their work.
- ~~• Comprehend, interpret, explain, and apply a variety of complex laws, regulations, procedures, and other information related to operations and programs of assigned department.~~
- ~~• Research regulations, procedures and/or technical reference materials.~~
- Comprehend, interpret, ~~and~~ explain, and apply a variety of complex laws, regulations, procedures, and other information related to operations and programs of assigned department 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.
- ~~• Determine the appropriate course of action in emergency or stressful situations.~~
- Make decisions, use independent judgment and work with little direct supervision as situations warrant.
- ~~• Plan, organize, and prioritize daily assignments and work activities.~~
- Manage a variety of simultaneous work projects and carry them through to successful completion.
- ~~• Understand program objectives in relation to departmental goals and procedures.~~
- 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 clearly and concisely, both orally and in writing.~~
- 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, maintain, and foster positive and harmonious working relationships with those contacted in the course of work, including those who have objectives counter to assigned role.~~
- Establish and maintain effective working relationships with those contacted in the performance of required duties, including those who have objectives counter to assigned role.

- 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 information.~~
- Maintain confidentiality of records and information per pertinent laws/regulations.
- ~~Utilize basic office equipment; use a computer to gather and analyze data.~~
- Use modern office equipment to include computers and related software applications which often are unique to the work of the assigned units.
- ~~Plan, coordinate, and initiate actions necessary to implement policy and administrative decisions.~~

ADA COMPLIANCE

~~**Physical Ability:** Tasks require 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 work station.~~

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

~~**Environmental Factors:** Performance of essential functions may require exposure to adverse environmental conditions, such as traffic hazards or bright/dim light.~~

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.

SPECIAL REQUIREMENTS

~~Possession of, or ability to obtain, a valid Class C California Driver's License may be required.~~

Candidates for positions in this class may be required to pass a background investigation in accordance with applicable law, regulation and/or policy. [Note: see Other Requirements section.]

SUPPLEMENTAL INFORMATION

~~Positions allocated to this class may require specific knowledge and abilities relating to the assigned department.~~

Independent travel may be required. [Note: see Other Requirements section.]

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 community organizations, 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:** December, 2000~~

~~**BOS Date:** June 30, 2003~~

~~**CSC Date:** March 2006~~

CLASS HISTORY AND CLASS INFORMATION:

- Date Approved by the Civil Service Commission: December 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:

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