

**CITY OF MOUNTAIN VIEW
CLASS SPECIFICATION**

Position Title: Senior Financial Analyst	Job Family: 2
General Classification: Management	Job Grade: 31

Definition: To perform complex responsible professional and analytical duties in providing staff assistance to department heads or other management personnel; to coordinate the Citywide budget process, revenue forecasting, and/or maintain the budget modules in the City's financial systems; to perform treasury and debt management functions; to conduct special studies, surveys, and research assignments in a variety of administrative and operational procedures and topics, often with departmentwide, cross-departmental, and/or major financial impact; to prepare effective written reports and present recommendations to senior management, boards, commissions, community groups, and the City Council; and to do related work as required.

Distinguishing Characteristics: This is the advanced journey-level class in the Financial Analyst series. Positions at this level are distinguished from other classes within the series by the level of departmentwide and cross-departmental responsibility assumed and the complexity of duties assigned in the areas of budgeting and revenue forecasting or treasury, debt, and financial systems administration with limited supervision. Employees must be fully trained in all procedures and have a full understanding of all programs related to the assigned area of responsibility.

Receives general supervision from management staff.

May exercise direct and indirect supervision over assigned professional, technical, and clerical personnel.

Examples of Duties: Duties may include, but are not limited to, the following:

1. Provide high-level staff support in coordinating the development of the Citywide annual budget systems management, revenue forecasting, and budget analysis and implementation.
2. Manage the City's investment portfolio, update annual investment policy and strategy to achieve financial and compliance objectives. Monitor, analyze, and evaluate the performance of external investment managers and perform daily review of banking activity and monitoring of cash-flow requirements.

3. Work with underwriters, financial advisors, and bond counsel regarding issuance of long-term debt; and monitor compliance with debt covenants and continuing disclosure requirements.
4. Provide support to department heads and other managers in the development, analysis, and implementation of policies, programs, procedures, and projects with departmentwide or cross-departmental impact.
5. Compile, analyze, interpret, and track qualitative and quantitative measures in order to assess cost, operational feasibility, effectiveness, and other aspects of policies, programs, and projects to support effective decision-making and to evaluate and resolve administrative, fiscal, personnel, and operational issues, including support for labor negotiations, using such tools as surveys, management studies, stakeholder analysis, sensitivity analysis, and statistical analysis.
6. Prepare complex contracts, proposals, grant applications, requests for proposals, and similar documents; and prepare reports and monitor grants and contracts for compliance.
7. Prepare a variety of fiscal, administrative, and management reports; prepare complex financial forecasts of expenditures and revenues, make recommendations regarding rate structures, bonding, budgeting, and other financial matters.
8. Manage assigned programs or projects; schedule, plan, coordinate, evaluate, and report on work progress and outcomes.
9. Write and present comprehensive, concise, and clear reports, memos, newsletters, and other communications; prepare a variety of fiscal, administrative, and management reports; and assist in the preparation of the City's budget reports and documents.
10. May maintain the budget modules in the City's financial system.
11. Represent the City and be a department liaison in interdepartmental, community, and professional teams, meetings, trainings, and events as required.
12. Support the coordination of intradepartmental and cross-departmental activities; and work with other City departments and divisions, community groups, outside agencies, and businesses.

13. Interpret Federal, State, and City regulations; and coordinate their application to City and department operations.
14. Provide staff support and make presentations on assigned projects and programs to the City Council, City commissions, and committees.
15. May perform complex financial analysis, including the calculation of present value, return on investment, life cycle cost, and cost-benefit comparisons.
16. Perform other related duties as assigned.

Minimum Qualifications:

Knowledge of: Principles and practices of public administration; principles, methods, and practices of municipal finance and budgeting; principles of treasury, investments, and debt management; sophisticated research techniques; statistics and techniques of complex financial forecasting, data analysis, and numerical/financial analysis; methods of continuous improvement; principles of organization and municipal government practices as applied to analysis and evaluation of programs, policies, and operational needs; methods of report preparation and presentation; successful methods of project and program management; pertinent State, Federal, and local laws and regulations; principles of contract and grant administration; modern office procedures, methods, and computer equipment and software; principles of supervision, training, and performance evaluation; City policies and procedures.

Ability to: Manage and participate in the analysis of a wide variety of moderate to complex administrative/operational/financial problems and make effective operational and/or procedural recommendations; work proactively, effectively, and efficiently in time-sensitive situations and meet deadlines; manage and complete large and complex projects; perform process improvements through the implementation of enhanced manual or automated systems solutions, which increase organizational efficiency; effectively utilize computers and automated systems; maintain confidentiality regarding City and departmentwide policies and changes; interpret policies, guidelines, and procedures; develop recommendations and assist in making decisions of considerable impact; work independently with minimal supervision; perform complex mathematical and statistical calculations accurately; perform sophisticated financial and operational analysis to assist decision makers; supervise, train, and evaluate assigned staff; evaluate program effectiveness; administer City programs, coordinate work, and collaborate with other divisions, departments, and outside agencies; communicate logically, clearly,

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and concisely, both orally and in writing; establish and maintain effective working relationships with those contacted in the course of work.

Experience and Training Guidelines: A combination of relevant experience, education, and training that will satisfy the required minimum qualifications, knowledge, and abilities.

Three years of increasingly responsible financial administrative and analytical experience related to organizationwide budgeting, revenue forecasting, treasury, debt insurance, or special analytical projects. A bachelor's degree from an accredited college or university with major course work in public administration, business administration, economics, or a related field. A master's degree in business or public administration, or Certified Public Accountant, is highly desirable.

Required Licenses or Certificates: Possession of, or ability to obtain, a valid California Driver License.

Established: August 2018

Revised: May 2019

HRD/CLASS SPECS

Senior Financial Analyst