

**CITY OF MOUNTAIN VIEW  
CLASS SPECIFICATION**

<b>Position Title:</b> Principal Financial Analyst	<b>Job Family:</b> 2
<b>General Classification:</b> Management	<b>Job Grade:</b> 35

**Definition:** To work independently to perform the most complex responsible professional and analytical duties in providing staff assistance to department heads or other management personnel; to coordinate Citywide budgeting, revenue forecasting, and maintain the budget modules in the City's financial system; to conduct special studies, surveys, and research assignments in a variety of administrative and operational procedures and topics often with Citywide 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 highest-level class in the Financial Analyst series. Positions at this level are distinguished from other classes within the series by the level of Citywide responsibility assumed and the complexity of duties assigned in the areas of budgeting, revenue forecasting, and analysis. Employees perform extremely complex, difficult, and responsible duties which require a great deal of independence of action and a full understanding of Citywide programs. Employees at this level are required to be fully trained in all procedures related to Citywide budgeting and revenue forecasting.

Receives direction from management staff.

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

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

1. Provide high-level staff work in coordinating the development of the Citywide annual budget, budget systems management, revenue forecasting, and budget analysis and implementation.
2. Provide high-level support to department heads and other managers in the development, analysis, and implementation of policies, programs, procedures, and projects with departmentwide or Citywide impact.
3. Compile, analyze, interpret, and track qualitative and quantitative measures in order to assess cost, operational feasibility, effectiveness, and other aspects of

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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 tools such as surveys, management studies, stakeholder analysis, sensitivity analysis, and statistical analysis.

4. Prepare complex contracts, proposals, grant applications, requests for proposals, and similar documents; prepare reports and monitor grants and contracts for program compliance.
5. Prepare complex financial forecasting of expenditures and revenues, make recommendations regarding Citywide cost recovery, rate structures, bonding, budgeting, and other financial matters.
6. Manage complex projects that cross department boundaries and require Citywide coordination and communication.
7. Write and present comprehensive, concise, and clear reports, memos, newsletters, and other communications; manage in the preparation of the City's budget reports and documents.
8. Maintain and review complex automated systems that provide budget, financial, programmatic, and operational information.
9. Represent the City and be a department liaison in interdepartmental, community, and professional teams, meetings, trainings, and events as required.
10. Lead the coordination of intradepartmental and departmental budgeting, revenue, and analytical activities with other City departments and divisions and outside agencies.
11. Interpret Federal, State, and City regulations; coordinate their application to City and department operations.
12. Make presentations regarding the development of the annual budget, current budget information, revenue projections, and other assigned projects and programs to the City Council, City commissions, committees, or others.

13. Complete complex quantitative and qualitative work, including systems analysis, evaluation of projects, present value, life cycle cost calculations, and cost-benefit comparisons.
14. 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; 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 the 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 effective supervision, training, and performance evaluation; City policies and procedures.

Ability to: Manage, review, and participate in the analysis of a wide variety of complex organization, administrative, financial problems, and make well-reasoned recommendations and implement an effective course of action; work proactively, effectively, and efficiently in time-sensitive situations and meet deadlines; coordinate a Citywide budgeting process, with multiple projects and complex tasks simultaneously; perform process improvements through the implementation of enhanced automated systems solutions which increase organizational efficiency; effectively utilize automated computers and automated systems; exercise significant confidentiality and judgment; 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 and coordinate work and collaborate with other divisions, departments, and outside agencies; communicate logically, clearly, and concisely, both orally and in writing; prepare well-organized reports, memos, and correspondence; make clear, effective oral presentations; establish and maintain positive and collaborative working relationships with those contacted in the course of work.

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

Four years of increasingly responsible financial administrative and analytical experience related to Citywide budgeting, revenue forecasting, 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 closely 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:

Revised: April 2021

HRD/CLASS SPECS

Principal Financial Analyst