

**CITY OF MOUNTAIN VIEW  
CLASS SPECIFICATION**

<b>Position Title:</b> Financial Analyst I Financial Analyst II	<b>Job Family:</b> 2 2
<b>General Classification:</b> Professional	<b>Job Grade:</b> 23 27

**Definition:** To perform responsible professional, analytical, and financial assignments in providing staff support to departments and divisions; to assist with the Citywide budget process, revenue forecasting, and/or assist in maintaining the budget modules in the City's financial system; conduct special studies, surveys, and research assignments in a variety of project, program, and/or operational procedures; and to do related work as required.

**Distinguishing Characteristics:**

Financial Analyst I: This is the entry-level class in the Financial Analyst series. This class is distinguished from the Financial Analyst II by the level of performance of the analytical tasks and duties assigned to positions within this series. Employees at this level are not expected to perform the duties at the full range, complexity, and/or with the same independence of direction and judgment on matters related to established procedures and guidelines as are positions allocated to the Financial Analyst II level. Since this class is typically used as a training class, employees may have only limited or no directly related work experience. Employees work under immediate supervision while learning job tasks.

Receives immediate supervision from management or professional staff and may receive technical and functional supervision from a Senior Financial Analyst.

Financial Analyst II: This is the full journey-level class within the Financial Analyst series. This class is distinguished from the Financial Analyst I by the assignment of the full range and complexity of duties possible. Employees at this level receive only occasional instruction or assistance as new or unusual situations arise and they are fully aware of the operating procedures and policies within the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the Financial Analyst I level. Financial Analyst IIs are distinguished from the Senior Financial Analysts since Financial Analyst IIs are assigned responsibility for smaller programs and projects and/or financial subfunctions of the department or division.

Receives general supervision from management staff and may receive technical and functional supervision from a Senior Financial Analyst.

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

1. Provide support and assist in the development and coordination of the Citywide annual budget, budget systems, revenue forecasting, and budget analysis and implementation; and support and monitor the department or division budget.
2. Provide general support to department head and other managers in the department on the development, analysis, and implementation of policies, programs, procedures, and projects with departmentwide or cross-departmental impact.
3. Perform research and financial or statistical analyses; compile and analyze data; evaluate, question discrepancies, and proactively find solutions; formulate recommendations and viable alternatives; assist in developing and conducting special financial studies, surveys, and research assignments.
4. Participate in administering contracts related to operations in the area of assignment; ensure documents comply with City contract standards; monitor programs for compliance with applicable rules, regulations, laws, and policies.
5. Assist in the preparation of forecasts of expenditures and revenues; provide recommendations and variable alternatives for forecasting methods.
6. Monitor and coordinate the daily operation of assigned functional area; perform financial detail-oriented work and maintain accurate records, systems, processes, and statistics; evaluate using appropriate metrics.
7. Write and present concise and clear financial reports, memos, and other communications, including assisting in the preparation of the City's budget reports and documents.
8. Assist in the planning, implementation, and maintenance of departmental systems, policies, processes, procedures, manuals, and forms for use in operation; provide personnel training on related areas.
9. Represent the City and/or department in interdepartmental, community, and professional meetings as required; make presentations as necessary.
10. Conduct special projects relating to a division or departmental program, as assigned.

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11. Interpret Federal, State, and City regulations; analyze and initiate recommendations to develop, improve, and/or ensure legislation compliance for department or division programs, systems, procedures, and methods of operation.
12. Provide support in preparing presentations on assigned projects and programs to City Council, City commissions, committees, and others.
13. May perform or assist in preparing financial analysis, including calculation of present value, return on investment, life cycle cost, and cost-benefit comparisons.
14. May assist in compiling, analyzing, and providing financial information in support of labor negotiations.
15. Perform other related duties as assigned.

**Minimum Qualifications:**

Financial Analyst I

Knowledge of: Principles and techniques of public administration, including basic budgeting and local government organization/structure; statistical concepts and methods; modern office procedures, methods, and computer equipment and software.

Ability to: Collect, compile, and analyze information and data accurately; participate in the analysis of a variety of administrative/operational/financial topics; work productively in time-sensitive situations and meet deadlines; communicate clearly and concisely, both orally and in writing; learn City policies and procedures relating to departmental programs; prepare concise reports, memos, and correspondence; effectively utilize computers and automated systems; maintain confidentiality regarding City and departmentwide policies and changes; develop and maintain organized systems and procedures for conducting departmental programs; make oral presentations; relate effectively with the public and employees; establish and maintain effective relationships with those contacted in the course of work.

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Financial Analyst II

In addition to the minimum qualifications for Financial Analyst I:

Knowledge of: Research techniques, sources, and availability of information, and of report preparation and presentation; pertinent Federal, State, and local laws and regulations; principles, methods, and practices of public administration, finance, and budgeting; organization and management practices as applied to the analysis and evaluation of programs, policies, and operational needs; principles and practices of research analysis, including statistics and data analysis; techniques of effective supervision.

Ability to: Participate in the analysis of a wide variety of studies requiring tact and diplomacy; conduct financial research and analysis; plan and conduct division or departmental programs, including organizing and facilitating meetings; gather, properly interpret, and analyze information and solve problems; set priorities and use time efficiently; make decisions in accordance with laws, rules, and policies; complete multifaceted projects, activities, and/or functions with good attention to detail; evaluate program effectiveness through systems analysis and other programmatic standards; perform mathematical and statistical calculations accurately; perform financial and operational analysis to assist decision makers; evaluate program effectiveness; administer City programs, coordinate work, and collaborate with other divisions, departments, and outside agencies; communicate logically, clearly, 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.

Financial Analyst I

No experience required. Graduation from an accredited college or university with a bachelor's degree in public administration, business administration, economics, or a related field.

or

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Two years of full-time experience at the Administrative Aide level with the City of Mountain View and an associate of arts degree with coursework in business, finance, or accounting.

Financial Analyst II

Two years of increasingly responsible full-time analytical experience equivalent to the position of Financial Analyst or Analyst I with the City of Mountain View and 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: August 2018

HRD/CLASS SPECS  
Financial Analyst I-II