

City of South San Francisco  
Human Resources Department

**Financial Analyst I**  
Class Description

**Definition**

Under general supervision, performs financial analysis of moderate difficulty; provides direction to department operations; prepares financial or technical reports in support of budget, redevelopment, cash flow, or related functions requiring comprehensive knowledge of the City's financial functions; and performs related duties as assigned.

**Distinguishing Characteristics**

The Financial Analyst I is a professional classification, performing moderately difficult and complex work involving Citywide financial and technical analysis and related aspects of financial management skills. Incumbents must have the ability to independently apply technical and specialized rules, regulations, policies, procedures, and activities related to the financial function. This class is distinguished from the higher-level financial analyst classification in that the higher-level performs highly complex financial analysis in several programs, and typically has less of a lead responsibility for highly technical or policy-related duties. It further differs from professional positions within the department by the analytical and programmatic responsibilities assigned to the higher-level analyst class.

**Typical and Important Duties**

1. Coordinates and participates in various projects, studies, and grants.
2. Gathers and assists in evaluating information from various sources, both within and outside the City; prepares appropriate reports, requests for proposals, and applications.
3. Prepares reports to City Manager, City Council, and executive-level staff.
4. Assists in forecasting of Citywide revenue and expenditures.
5. Assists in the review and analysis of budget requests for needs, conformance to stated objectives, and the historical basis of use.
6. Assists with cash flow modeling.
7. Assists in management of real property projects, including administration of contracts or lease agreements, coordination of condemnation procedures; and preparation of specifications, leases, deeds, or other documents.
8. Prepares Requests for Proposals.
9. Assists in the preparation of documents for debt issuance.
10. Prepares information related to the selection of financial institutions and contract administration.
11. Assists in interpretation of City financial policies for other City departments, and makes recommendations as the appropriateness of policy changes.
12. Prepares detailed and confidential correspondence, reports, and specialized documents related to the department.
13. Assists in budget preparation, researching items, and recommending changes; prepares

- and transmits a variety of financial documents, including payroll.
14. Assists in labor negotiations and/or runs salary proposal financial models, as appropriate.
  15. Establishes and maintains office and specialized files; researches and compiles information from such files.
  16. Operates standard office equipment, including job-related computer hardware and software applications, facsimile equipment, and multi-line telephones; may operate other department-specific equipment.
  17. May train others in work procedures; may direct the work of hourly or volunteer staff on a project or day-to-day, short-term basis.
  18. Perform related duties and responsibilities as assigned.

### **Job-related Qualifications**

#### Knowledge of:

- Principles, methods and techniques of public administration.
- Information technology application, principles, and modern office machines.
- Laws, regulations, municipal codes, ordinances, and resolutions.
- Basic principles, practices, and concepts of financial analysis in a public agency setting.
- Standard office administrative practices and procedures, including the use of standard office equipment.
- Business letter and report writing and the standard format for reports and correspondence.
- Computer applications related to the work, including spreadsheet, word processing, and database applications.
- Records management principles and practices.
- Basic functions and activities of a City government.
- Research techniques and practices.
- Techniques for dealing effectively with the public and City staff, in person and over the telephone.

#### Ability to:

- Represent City policies effectively with property owners, attorneys, brokers, auditors, other public agencies, and professional organizations.
- Analyze complex financial and technical data.
- Prepare clear, concise, and comprehensive reports.
- Plan and organize responsibilities so that reports are produced in a timely and accurate manner.
- Read, interpret, apply, and explain rules, regulations, policies, and procedures.
- Perform technical, specialized, complex, and difficult office financial analysis requiring the use of independent judgement.
- Communicate effectively in writing, orally, and with others to assimilate, understand, and convey information, in a manner consistent with job functions.
- Analyze issues and resolve administrative and procedural problems.
- Establish, maintain, and research departmental files.
- Make oral and written presentations and reports, including drawing conclusions and formulating recommendations.

- Use English effectively to communicate in person, over the telephone, and in writing.
- Use initiative and independent judgment within established procedural guidelines.
- Organize own work, set priorities, and meet critical deadlines.
- Maintain confidentiality regarding sensitive information.
- Establish and maintain effective working relationships with applicants, employees, city officials, labor unions, and the general public.
- Take a proactive approach to customer service issues.
- Recommend process improvement changes to streamline procedures.
- Work in a safe manner, following City safety practices and procedures.
- Learn and utilize job-related computer applications.
- Direct the work of others on a project or day-to-day basis; train others in work procedures.

Skill in:

- Entering and retrieving data from a computer with sufficient speed and accuracy sufficient to perform assigned work.
- Rapid note taking and accurate transcription of own notes.

### **Experience and Training**

Any combination of experience and training that would provide the required knowledge, skills, and abilities would be qualifying. A typical way to obtain the knowledge, skills, and abilities would be:

Experience:

Two years of progressively more responsible experience in municipal government administration or a related field.

Training:

A bachelor's degree from an accredited college or university with major coursework in finance, public policy or administration, economics, or a related field. Six months of additional experience as described above may be substituted for some of the educational requirement.

### **Licenses and Certificates**

All licenses and certificates must be maintained as a condition of employment.

- Possession of, or ability to obtain, a valid, appropriate California driver's license and a satisfactory driving record.

### **Special Requirements**

Essential duties require the following physical skills and work environment:

Physical Skills:

Able to use standard office equipment, including a computer; sit, stand, walk, kneel, crouch, stoop, squat, twist, and maintain sustained posture in a seated or standing position for prolonged periods of time; vision to read printed materials and a computer screen; hearing and speech to communicate in person, over the telephone, and to make presentations; lift and carry 35 pound boxes, files, and materials.

**Work Environment:**

Mobility to work in a typical office and/or field setting.

**Ability to:**

Travel to different sites and locations; drive safely to different sites and locations; maintain a safe driving record; work protracted and irregular hours or off-shift work for meeting attendance or participation in specific projects or programs.

**Additional Information:**

- Approved: June 2000
- Revised Date: June 2003
- Former Titles:
- Abolished:
- Bargaining Unit: Mid-management
- DOT: No
- Status: Classified/exempt
- Job Code: M600