

City of South San Francisco  
Human Resources Department

**Financial Analyst II**  
Class Description

**Definition**

Under general direction, performs complex financial analysis requiring considerable technical skills; prepares key financial or technical reports for budget, , cash flow/treasury, business licenses, tax revenues, investment reporting or related functions that require extensive knowledge of City's financial functions; and performs related duties as assigned.

**Distinguishing Characteristics**

The Financial Analyst II is a professional classification, performing difficult and complex work involving Citywide financial and technical analysis and related aspects of financial management. Incumbents must have the ability to independently apply technical and specialized rules, regulations, policies, procedures, and activities related to the financial function. Assignments may be in any area of the finance function, but will normally be somewhat specialized in a limited number of areas to ensure efficient service provision to City departments and employees. This class is distinguished from the lower-level financial analyst classification in that it performs highly complex financial analysis in several programs, and takes a leadership role for highly technical, complex, or policy-oriented assignments. It further differs from professional positions within the department by the analytical and programmatic responsibilities assigned to this higher-level analyst class. Position requires extensive knowledge of the City's financial functions and the ability to exercise independent judgment.

**Typical and Important Duties**

1. Manages various projects, special studies, and grants.
2. Gathers and evaluates information from various sources, both within and outside the City, and prepares appropriate reports, requests for proposals, and applications.
3. Reviews city workflow procedures related to administrative functions that impact finance and make process improvement recommendations.
4. Drafts financial policy and procedures.
5. Prepares a variety of reports to City Manager, City Council, and executive-level staff.
6. Performs financial forecasts; prepares forecast of Citywide revenue and expenditures.
7. Develops rate or financial models of moderate complexity and/or maintains such model, may also maintain more complex models other have developed.
8. Reviews and analyzes budget requests for needs, conformance to stated objectives, and the historical basis of use; makes recommendations for increases or decreases to resource allocations.
9. Manages real property projects including administration of contracts or lease agreements, coordination of condemnation procedures, and preparation of specifications, leases, deeds or other documents.
10. Participates in cash flow modeling by either developing models or maintaining them. Ability

to research financial source documents (General Ledger, debt records, payroll, budget documents) to plan cash flow.

11. Prepares Requests for Proposals; do documents for debt issuance.
12. Supports labor negotiations by developing and maintaining salary models.
13. Advises in the selection of financial institutions and contract administration.
14. Interprets City financial policies for other City departments, and makes recommendations as the appropriateness of policy changes.
15. Attends and participates in City Council and various advisory or citizen committee meetings.
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. Takes a lead role in coordinating projects, which may involve other departments.
18. 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.
19. Performs related duties and responsibilities as assigned.

### **Job-related Qualifications**

#### *Knowledge of:*

- Principles, methods and techniques of public and financial administration.
- Laws, regulations, municipal codes, ordinances, and resolutions.
- Advanced 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.

#### *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 and comprehensive reports, including recommendations for action.
- Ability to be flexible in applying a variety of strategies towards meeting goals.
- Ability to multitask and move from project to project as requires.
- Manage a project from inception to completion; solicit and obtain compromise from the organization to ensure a successful project implementation; and obtain organizational support for a project.
- Establish and maintain cooperative relationships with those contacted in the course of the work.
- Communicate effectively in writing, orally, and with others to assimilate, understand, and convey information, in a manner consistent with job functions.
- 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 financial analysis requiring the use of independent judgement.
- 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.
- Organize own work, set priorities, and meet critical deadlines; use initiative and independent judgment within established procedural guidelines; plan and organize responsibilities so that reports are produced in a timely and accurate manner; exercise independent judgment; and make sound decisions.
- Maintain confidentiality regarding sensitive information.
- Establish and maintain effective working relationships with employees, city officials, labor unions, and the general public.
- Take a proactive approach to customer service issues.
- Make 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:* Three years of progressively more responsible experience in municipal government administration or a related field demonstrating financial management, project management, and independent judgment experience.

*Training:* A bachelor's degree from an accredited college or university in finance, public policy or administration, economics, or a related field. A master's degree from an accredited college or university in a related field may be substituted for one year of the experience 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.

Approved: June 2000  
Revised Date: June 2003, October 2012  
Former Titles:  
Abolished:  
Bargaining Unit: Mid-management  
ADA Review: 2007, October 2012  
DOT: No  
Physical: Class 3  
Status: Classified/exempt  
EEOC Category: EF1, EJ2  
Job Code: M610

**ADA Documentation of Essential Duties**

1. SDE
2. SDE
3. SDE
4. OAE
5. SDE
6. SDE
7. OAE
8. SDE
9. OENE
10. OAE
11. OAE
12. OAE
13. OAE
14. SDE
15. OAE
16. SDE
17. SDE
18. MAE