

CITY OF HUNTINGTON BEACH
CLASS SPECIFICATION



TITLE: PRINCIPAL FINANCE ANALYST

PERSONNEL COMMISSION APPROVAL: DECEMBER 19, 2018

COUNCIL APPROVAL: MARCH 4, 2019

JOB CODE: 0896

EMPLOYMENT STATUS: REGULAR FULL-TIME

UNIT REPRESENTATION: MEO

FLSA STATUS: EXEMPT

JOB SUMMARY

Under general direction, supervises the activities of assigned personnel in budget administration and procurement services.

SUPERVISION RECEIVED AND EXERCISED

Reports to: Finance Manager or as designated by the Chief Financial Officer
Supervises: Senior Finance Analyst, Buyer, and other administrative support staff

DISTINGUISHING CHARACTERISTICS

Differs from Senior Finance Analyst in that Principal Finance Analyst is a first-line supervisor over assigned staff in budget and procurement while the Senior Finance Analyst is responsible for performing advanced-journey level financial, research, and analytical duties in support of the City's overall budget and financial preparation and reporting processes.

EXAMPLES OF ESSENTIAL DUTIES

- Assigns, monitors and supervises the work of subordinate staff; participates in the selection and hiring of personnel; conducts performance evaluations and recommends merit step increases; assesses disciplinary action when needed; provides and/or recommends training
- Leads the preparation, implementation, monitoring and evaluation of capital improvement budget revenues and expenditures
- Oversees the coordination of the master fee schedule
- Prepares and analyzes highly complex and sensitive budget requests, policy proposals, and financial reports, including reports regarding the City's long-term obligations, revenue forecasts and expenditure trends

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- Supervises the City-wide procurement activities, including the purchase of City-wide goods, services and office supply orders
- Maintains the list of qualified vendors and coordinates the competitive bidding process
- Manages the procurement card, leasing, equipment replacement, professional services, fuel management and copy machine programs
- Assists City departments with compliance of contract administration and procurement policies and procedures
- Oversees the reprographic and mail operations contract for printing services and the daily collection, sorting, metering, and delivery of mail to and from all City departments
- Prepares a variety of complex financial analyses, forecasts, and reports utilizing computer software and other projection tools
- Recommends options and practices to reduce costs and increase revenues
- Conducts reconciliations and analysis of fiscal transactions to ensure compliance with municipal codes and policies, and federal and state laws, rules and regulations
- Conducts and coordinates special research studies and projects as assigned
- Researches, reviews, analyzes and follows-up on legislation related to revenues, expenditures, and general governmental financing
- Ensures compliance with state and federal guidelines and municipal codes and charter
- Collaborates with other department personnel to achieve optimal departmental and city-wide performance and outcomes
- Works various hours, including nights and weekends as deemed necessary by manager to conform with changing priorities and meet deadlines
- Reports to work as scheduled; maintains satisfactory attendance record
- Performs other related duties as required

The preceding duties have been provided as examples of the essential types of work performed within this job classification. The City, at its discretion, may add, modify, change or rescind work assignments as needed.

MINIMUM QUALIFICATIONS:

Any combination of education, training, and experience that would likely provide the knowledge, skills, and abilities to successfully perform in the position is qualifying. A typical combination includes:

Knowledge of:

- Federal, state, and local laws, rules, and regulations governing municipal finance, budgeting, financial reporting, and procurement
- Financial management concepts, applications and contemporary modeling

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methods related to revenue and expenditure projections

- Principles and practices of record keeping, report writing, and project management
- Computer technology and software related to financial analysis, modeling, data management, and manipulation
- Principles, methods and procedures of purchasing goods, supplies and services for a public agency, including the competitive bid process; commodity markets, marketing practices, and commodity pricing methods
- Research methods, report writing techniques, and statistical concepts and applications
- Principles and techniques of project management
- Principles and practices of modern public administration, including planning, organizing, communicating, staffing, leading, and controlling
- Principles of supervision, training and performance evaluation

Ability to:

- Plan, organize, administer, coordinate review and evaluate the activities of a comprehensive public agency financial work unit
- Perform complex budget and financial analyses, reports and projections
- Understand, interpret, and apply laws, rules, regulations, policies, procedures, contracts, best budget practices, budgets, and labor/management agreements
- Analyze proposed capital, personnel, operating and maintenance expenditures; manage the tracking and monitoring of budget expenditures, including contracts
- Prepare multi-year financial historical and forecast models
- Plan, organize, prioritize, delegate and coordinate work to completion in a timely manner
- Communicate effectively orally and in writing
- Exercise judgment and creativity in making conclusions and recommendations
- Exercise independent judgment in managing workload demands and priorities
- Collaborate and deal constructively with conflict to develop consensus
- Analyze and evaluate complex revenue, collections and administrative problems and develop and implement effective solutions
- Read and interpret complex laws and regulations impacting City financial activities
- Establish sources of supply, product and vendor information
- Analyze problems, identify alternative solutions, project consequences of proposed actions
- Prepare and present complex narrative and financial reports
- Make public presentations calmly and professionally
- Manage complex projects, on time and within budget
- Establish and maintain cooperative working relationships with those contacted in the course of work, including superiors, peers, subordinates, and the public

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- Manage and direct staff to ensure professional work standards are met and quality customer service is delivered
- Meet critical deadlines; make decisions under pressure

Education: A Bachelor's degree from an accredited college or university in Economics Finance, Business, Public Administration or other closely related field. A Master's degree is preferred.

Experience: Four (4) years increasingly responsible professional level governmental financial management, accounting, budgeting or auditing experience, with an emphasis in business and revenue operations activities, including one (1) year supervising professional-level finance staff for a municipality or other public sector entity..

Certificates/Licenses: A valid California Class C driver license with an acceptable driving record required at time of appointment and during course of employment.

SPECIAL CONDITIONS

Employees regularly assigned/required to drive a city or personal vehicle in the course and scope of work shall be required to participate in the DMV Employer Pull Notice program.

Public Employee Disaster Service Worker: In accordance with Government Code Section 3100, all Huntington Beach city employees are required to perform assigned disaster service worker duties in the event of an emergency or a disaster.

PHYSICAL TASKS AND ENVIRONMENTAL CONDITIONS

The incumbent must be able to meet the physical requirements of the job class and have mobility, balance, coordination, vision, hearing and dexterity levels appropriate to the duties to be performed.

Work is performed in a general office environment, requiring sitting for prolonged periods of time; standing and walking to retrieve work files or to other departments or office locations; leaning, bending and stooping to perform work behind a desk or to retrieve information; pushing, turning or twisting to move chair or body from desk; reaching to place or retrieve files or open file drawers or cabinets; light grasping to hold a writing instrument or documents; firm grasping as needed to lift and carry work files or operate office equipment; finger dexterity to type on a computer keyboard; and, hearing and speaking to answer the telephone or answer questions of co-workers and subordinates.

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Work may necessitate some lifting, carrying, pushing and/or pulling of objects and materials of light weight (5-10 pounds).

Reasonable accommodation(s) for an individual with a qualified disability will be considered on a case-by-case basis.

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