

CITY OF HUNTINGTON BEACH

CLASS SPECIFICATION



TITLE: SENIOR FINANCE ANALYST

PERSONNEL COMMISSION APPROVAL: [OCTOBER 21, 2020](#)
COUNCIL APPROVAL: [\(Revised\) february 22, 2017](#)
MARCH 20, 2017

JOB CODE: 0868
EMPLOYMENT STATUS: REGULAR FULL-TIME
UNIT REPRESENTATION: MEO
FLSA STATUS: EXEMPT
EEOC CODE: **PROFESSIONALS**

JOB SUMMARY

Under general supervision, performs a variety of advanced professional-level accounting, budgetary, and financial analysis and reporting related to the City's financial functions and in the performance of a broad range of related duties of extreme complexity related to City budgetary operations and finance administration.

SUPERVISION RECEIVED AND EXERCISED

Reports to: Finance Manager or as designated by the Chief Financial Officer/Assistant Chief Financial Officer

Supervises: May provide lead direction to technical and/or administrative support staff
~~---Budget~~

DISTINGUISHING CHARACTERISTICS

This is a professional-level classification in the Finance Analyst series. It differs from the Principal Finance Analyst in that the Principal Finance Analyst is a first-line supervisor over assigned staff and performs the most complex analysis. Senior Finance Analyst differs from Senior Administrative Analyst in that Senior Finance Analyst participates in the oversight and preparation of the City's overall budget, CAFR and other complex financial reports while the Senior Administrative Analyst is responsible for performing advanced-journey level financial, research, administrative, and analytical duties in

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support of an assigned department.

EXAMPLES OF ESSENTIAL DUTIES

- Perform complex financial calculations and analysis; prepare comprehensive financial studies, statements, and reports
- Prepare and analyze a variety of financial statements, schedules, and reports; ensures that financial statements are prepared on a timely basis in accordance with related governmental accounting regulations
- Assist in the development of accounting and audit control methods, systems and procedures to comply with accounting procedures, laws, ordinances and regulations; coordinate the preparation of external audit materials and assists auditors in the fiscal year review
- Assists in establishing parameters for revenue and expenditure estimates and makes recommendations for fiscal guidelines in the budgetary process;
- Participates in the development of schedules, formats, policies, and procedures for the annual adopted budget
- Assists departments with the formulation, implementation and administration of capital and operating budgets
- Provides direction to department staff ~~during budget preparation and year end closing~~; serves as Finance Department liaison in directing and assisting department representatives with accounting, financial reporting and budget development, administration and implementation throughout the year to ensure adherence to established budget and financial parameters
- Monitors and reviews financial performance of City departments and projects by conducting budgetary, variance and fund analyses and preparing reports; reviews revenue and expenditures of departmental budgets and develops mitigation plans
- Monitors, evaluates, and reports on operating and capital budget revenues and expenditures
- Develops and coordinates budget and financial forecasting models; performs budget projections and variance analyses
- Prepares a variety of complex financial analyses, forecasts and reports utilizing computer software and other projection tools
- Performs due diligence on accounting, budgetary and financial matters to ensure the accuracy of fiscal information provided to staff, the Executive Team, City Council

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and the public

- Reviews and analyzes fiscal information submitted to Council approval for accuracy
- Recommends options and methods to reduce costs and increase revenues
- Assists in the preparation and administration of grant finances, including the coordination of grant audits and response to audits
- Explains relevant accounting guideline to departmental staff; responds to questions, provides information and support to departments
- Prepares journal entries and reconciliations for complex accounting transactions such as debt issuance and refunding, capital assets acquisition and related transactions
- Assists in developing and maintaining the five-year financial forecasts
- Performs special projects such as overhead allocation benchmark studies and review of applications for funds,
- Researches, reviews, analyzes and follows-up on legislation related to revenues, expenditures, and general governmental financing
- Analyzes and prepares costing estimates in support of labor negotiations
- Collaborates with other Finance Department staff of all financial requests to ensure proper application and conformance with City rules and other related laws and regulations
- Assists with implementation of City Council directives regarding financial issues~~development and revision of budget~~
- Assists in the preparation of the Capital Improvement Program funding including analyzing available funds estimates and fund balance information
- Reviews alternative revenue sources and assists in coordinating the activities necessary for implementation
- ~~Provides technical assistance regarding budget development, as needed, to departments~~
- Reports to work as scheduled, works a variety of schedules including evenings, weekends, and holidays, as required
- Performs other related duties as required

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

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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:

- Principles and practices of best accounting and budget practices, budget development and financial reporting programs for public sector entities
- Federal, State, and local laws, rules, and regulations governing municipal financial systems, financial reporting, revenue sources, and budget administration
- Financial management concepts and applications and contemporary modeling methods related to revenue and expenditure projections
- Research methods, report writing techniques, and financial concepts and applications
- Principles and practices of modern financial record keeping, report writing, and project management
- Computer technology and software related to financial analysis, modeling, data management, and manipulation
- Advanced principles, practices, and applications of public agency financial analysis
- English usage, grammar, spelling, vocabulary, and punctuation
- Techniques for providing a high level of customer services by effectively dealing with the public, vendors, contractors, and City staff

Ability to:

- Perform complex accounting, 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

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- Plan, organize, prioritize, ~~delegate~~ and coordinate work to completion in a timely manner
- Compile and analyze complex data
- Communicate effectively orally and in writing
- Prepare comprehensive reports and correspondence
- Analyze situations, identify problems, and recommend solutions
- Interact professionally with various levels of employees and outside representatives
- Exercise judgment and creativity in making conclusions and recommendations
- Exercise independent judgment in managing workload demands and priorities
- Plan and coordinate multiple high profile projects simultaneously
- Meet critical deadlines
- Collaborate and deal constructively with conflict to develop consensus

Education: A Bachelor's degree from an accredited college or university in Accounting, Business, Finance, Public Administration, Economics, or other closely related field ~~from an accredited college or university~~. A Master's degree, Certified Public Accountant (CPA), and/or Certified Government Financial Manager (CGFM) ~~in a related field~~ is desirable.

Experience: Four (4) years' professional level experience performing complex governmental accounting, budgetary financial analysis and research including two (2) years' related finance and/or auditing experience for a municipality or other public sector entity.

License/Certification: A valid California Class C driver license with an acceptable driving record required by 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

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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. Work may necessitate some lifting, carrying, pushing and/or pulling of objects and materials of light weight (5-10 pounds). Job requires working in a fast-paced, high-pressure environment and may necessitate adjusting work schedules to include working nights, scheduled days off, and weekends to meet obligatory deadlines and quick turnaround assignments or projects.

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

Est. 2/2017

Rev. 6/2020 PA