



Job Title: **Finance Analyst**
Department: Finance
Date: June 1, 2021
 Exempt
FLSA Exemption: Administrative/Executive
Job Reports To: Finance Director
Pay Grade: 16
 Full Time

Job Description

Summary/Objective

Under general direction of the Finance Director, performs varied, professional, analytical and highly responsible work, in the formation, annexation and administration of special districts. Provides technical expert advice and direction to professional accounting and administrative staff in the implementation and maintenance of the special districts financial records in full compliance with Generally Accepted Accounting Principles (GAAP), Governmental Accounting Standards Board (GASB), Federal, State, and Local regulations and performs other related work as required.

Essential Job Functions *The duties listed below are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the following essential functions:*

1. Work directly with landowners, developers, consultants, attorneys, property owners and other customers regarding the process and timing involved in annexation, formation or administration of Special Districts.
2. Maintain files, maps, communications and documents needed for processing. Develop forms and instruction sheets as needed. Calculate fees, and accept payments.
3. Work with and delegate duties to financial analysts, legal counsel, special district consultants, engineers, architects and City staff.
4. Agendize completed annexation or formation applications and present all documents for City Council review, approval and adoption.
5. Attend City Council meetings to answer questions, assist city Clerk to open ballots and prepare tabulation at city council meeting.
6. Respond to information requests with copies of reports, resolutions, maps, letters, etc.
7. Track documents, maps, notices, signatures, recording, etc. (includes all CFDs, LLPDs, ADs) through annexation or formation completion.
8. Oversee all Public Notice requirements.

9. Distribution of adopted district information and annexation information, such as maps, reports, resolutions to all applicants, Community Development, Public Utilities, and Finance. Scan and data entry of information as needed.
10. Maintain district parcel data base that is cross-referenced to tract numbers, developers, landowners and street addresses. Reconcile district parcels to levy process and tax assessment.
11. Work with Community Development and Planning during the project review phase for appropriate application of special district zone requirements.
12. Track all costs on a job cost basis and calculate developer deposit refund.
13. Compile manuals for each zone with all information regarding costs, work order jobs, utility meters, and account numbers. Documentation of facility acceptance.
14. Work with Public Utilities to inspect and accept facilities for City take over.
15. Work with Public Utilities on warranty claims against developers.
16. Work with Public Utilities to develop a budget for each district zone, as needed.
17. Work with Finance and Public Utilities to update job work orders and processing of job cost accounting of labor hours.
18. Update shared facility resource lists and account numbers to be charged, i.e. street lights and traffic signals to insure each zone pays for its share of benefits.
19. Review and/or code ongoing invoices for materials and labor to the proper special benefit zone.
20. Administer budget for each benefit zone with Public Utilities and review ongoing expenditure reports.
21. Site visit district facilities and review progress periodically.
22. Work with Public Utilities to review district maintenance, allocation of resources and manpower.
23. Assist in and review job cost labor hours allocated to benefit zones.
24. Train and supervise temporary employees or assistants.
25. Assist with feasibility analysis, rate studies, and cost allocation plans, as needed.
26. Maintain and update Land Financing Policy, as needed.
27. Work with webmaster making information available on the web regarding all districts and assessments.
28. Prepare and update district information sheets and disclosure information for distribution to local real estate agents and escrow companies.
29. Maintain, develop & update existing documented procedures and schedules related to all special districts applications.
30. Assist in the annual property tax levy process of all special districts. Prepare reports, agenda items, lists, research property information as needed.

Other Job Related Duties Performs other related duties or responsibilities as assigned.

Conformance Statement

In the performance of respective tasks and duties all employees are expected to conform to the following:

- Perform quality work within deadlines with or without direct supervision.
- Interact professionally with other employees, residents, suppliers and elected officials.
- Work cooperatively and effectively as a team contributor on all assignments.
- Work independently while understanding the necessity for communicating and coordinating work efforts with other employees and organizations.
- Maintain the highest level of ethical behavior in all matters.

Competencies

1. Ethical Conduct.
2. Time Management.
3. Organization Skills.
4. Financial Management.
5. Project Management.
6. Personal Effectiveness/Credibility.

Qualification Guidelines

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

Education

Bachelors' degree in Business, Accounting or Finance from an accredited College or University.

Experience

Minimum of three years increasingly responsible experience in an analyst role or advanced technical office environment, including one-year recent Municipal and election laws and procedures that relate to Special Districts or other governmental experience; Minimum of one-year work experience in accounting or auditing.

Desirable

Work experience with Special Districts, municipal government and supervisor skills are highly desirable.

Licenses and Certificates:

Must possess a minimum of a valid Class "C" California Driver's License, with a safe

Knowledge, Skills & Abilities

Knowledge of:

- Municipal and election laws, procedures that relate to special districts.
- Knowledge and experience in modern office equipment — both software (Microsoft Office, networking software/email) and hardware (personal computers, scanners) — speed & accuracy is important.
- Word processing, spreadsheets, using networking software, e-mail or the equivalent work experience.

Ability to:

- Work independently.
- Make logical and reliable decisions based on interpretation of codes, ordinances, resolutions, policies and extraneous documents and to effectively communicate those findings.
- Establish and maintain cooperative working relationships with the public and with Co-workers.
- Provide information and organize materials in conformance with policies and regulations.
- Must be able to understand complex issues.
- Must have attention to detail and be able to proof documents.
- Must be able to work with multiple tasks and be able to schedule and prioritize accordingly to meet deadlines.
- Must be able to work with multiple departments effectively and be able to implement programs.

Skills:

- Make mathematical calculations.
- Effective, strong written skills – excellent English skills, speaking, spelling, grammar and punctuation; must be able to compose memorandums, letters and reports.
- Follow oral and written instructions.
- Should have supervisory skills and be able to effectively delegate projects.
- Receive the public in person and over the phone using tact and diplomacy.

Work Authorization/Security Clearance

Must complete post-offer/pre-employment Department of Justice finger printing and background screening. Work authorization as required by the U.S. Citizenship and Immigration Services is mandatory within three business days of hire.

Disaster Service Worker Requirements

Under California Government Code Sections 3100 - 3109, public employees are designated as disaster service workers. The term "public employees" includes all persons employed by the state or any county, city, state agency, or public district. Disaster service workers are required to participate in such disaster service activities as may be assigned to them by their employer or by law.

Pre-Employment

All employment offers are contingent upon successful completion of a pre-employment physical exam, a criminal background investigation, which includes finger printing and a pre-employment physical and drug/alcohol test.

Working Conditions, Mental and Physical Demands

The physical demands herein are representative of those that must be met by an employee to successfully perform the essential functions of this job. *Reasonable accommodations may be made to enable individuals with disabilities to perform these essential job functions.*

Work Environment

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer, to operate a motor vehicle, and to visit various City and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone.

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

Indoor office environment; the employee is frequently required to sit, stand, walk, use hands and fingers, and reach with hands and arms. Lifting and carrying up to 40 pounds. Noise and temperatures are moderate and fumes are not generally present.

Physical Demands

This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment.

Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift books and files from shoulder-level and above, carry, push, and pull materials and objects weighing up to 40 pounds.

Visual acuity to perform routine filing of documents is required; and use of a computer keyboard and software. While performing the duties of this job, the employee is regularly required to see, talk, and hear.

Essential Mental Functions

Regularly use of written and oral communication skills, read and interpret data, analyze and solve problems; observe and interpret situations; interact with City staff. Be able to make quick decisions, supervise others, problem solve, read, write, and speak publicly. Essential to be able to read, organize, process and interpret data.

Be able to make quick decisions, provide guidance and direction to others, problem solve, read, write, and speak publicly. Essential to be able to read, organize, process and interpret data, and be able to add, subtract, multiply and divide.

Supervisory Responsibility

Receives general direction from the Finance Director or Deputy City Manager. May exercise indirect supervision over professional, technical and office support staff in the absence of the Finance Director and/or Senior Accountant. May assist the Finance Director in supervision and training of staff, ensuring compliance with Federal and State regulations.

Expected Hours of Work/Work Schedule

Monday – Thursday 7:00 AM – 6:00 PM (4x10 work week). Occasional evening and weekend work may be required as job duties demand.

Travel

Occasional, local travel is expected for this position. In addition, out of town travel for conferences, workshops, and various training opportunities is likely.

Disclaimers and Approval

The disclaimer informs the employee that the job description is not a contract between the employee and the employer, that the employer may change the job description or that the employer may request the employee to perform additional duties.

This job description has been approved by all levels of management:

City Manager _____ *[Signature]* Date 6/3/2021
Finance Director _____ *[Signature]* Date 6-3-21
HR _____ *[Signature]* Date 6/2/2021

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Employee signature below constitutes employee's understanding of the requirements, essential functions and duties of the position.

Employee _____ Date _____