

**COUNTY OF SOLANO  
POLICY AND FINANCIAL ANALYST**

**Est. 4/03  
CSC Exempt**

**CLASS SUMMARY**

Under general direction of the Director of Administrative Services, plans, prepares, and analyzes budgets for program areas, conducts management analysis and high-level data analysis, provide decision support data essential for program planning and outcome measurements, mentors analysts and other technical staff; performs other duties as required.

Employees may be promoted to the class of Policy and Financial Manager without further competition upon meeting qualification and performance requirements.

**DISTINGUISHING CHARACTERISTICS**

This position is a Senior Management class assigned to a program area budget or the decision support area within the Health and Social Services Department. These positions will serve as an interface between the program and administrative staff.

Policy and Financial Analyst is distinguished from the:

- **Senior Staff Analyst** class by exhibiting a higher level of responsibility in program oversight, monitoring, understanding, justifying, and articulating program needs and priorities. .
- **Director of Administrative Services** class which performs a variety of difficult management, administrative financial and analytical assignments, and exercises direct line supervision over a large administrative and program staff through subordinate managers; and the
- **Policy and Financial Manager** class which is the full-performance level class in this series.

**SUPERVISION RECEIVED AND EXERCISED**

- General direction is provided by the Director of Administrative Services.
- Responsibilities may include supervision over assigned Staff Analyst (Senior)s, Staff Analysts, Accountants, clerical and technical staff.

**ESSENTIAL DUTIES:**

This class specification represents the core area of responsibilities; specific position assignments will vary depending on the needs of the department.

- Assigned a program area budget, assists in the development, preparation and monitoring of the Department's annual budget; receives and analyzes division budget requests; reviews expenditure patterns; projects future revenues and expenditures.

- Ensures compliance with generally accepted accounting principles (gaap); analyzes assigned segments of total budget and reports to Department Head and Executive Management staff; serves as liaison between divisions, Human Resources, Auditor-Controller, County Administrator and other representatives on matters related to the budget process.
- Consults with division managers and staff on operational, organizational and administrative issues; participates in the development of annual work plans, long-range planning objectives, operational policy and procedures.
- Provides consultative direction to managers on matters related to organizational and/or operational effectiveness.
- Provides staff support to the Department Head and Executive Management staff; conducts studies of complex organizational and operational concerns; develops funding proposals alternatives and strategies; prepares and presents reports and recommendations on studies and administrative issues.
- Assists in the development and implementation of fiscal plans and policies; prepares comprehensive budget documents; reviews and monitors overall expenditures and revenues.
- Conducts high-level data analysis from a variety of data sources. Provides decision support data essential for program planning and outcome measurements; designs evaluation plans and reports.
- Supervises all assigned staff; provides guidance to staff in operational/fiscal analysis, effective consultation/presentation style and other matters.
- May be assigned specific operational authority over projects, services and/or operations; assists in training of analyst and technical staff.

**EDUCATION AND EXPERIENCE:**

**Experience:**

Four years of professional level public sector administrative experience involving fiscal, operational and/or policy analysis, which demonstrates possession of and competency in requisite knowledge and abilities.

**And**

**Education:** A Bachelor's degree from an accredited four-year college preferably in Accounting, Finance, Business Administration, Public Administration, Political Science, Economics or a related social science field is required. A Master's degree in Public Administration, Business Administration or a closely related field is highly desirable.

**LICENSING, CERTIFICATION AND REGISTRATION REQUIREMENTS:**

- Applicants are required to possess a valid California Driver's License, Class C.

**REQUIRED KNOWLEDGE, SKILLS AND ABILITIES:****Knowledge of:**

- standard operational policies and practices of County governments;
- sources of revenue and expenditures typical of local governments;
- long-range planning strategies;
- data collection tools;
- data management software;
- analytical techniques and outcome measurement, including performance management; public service delivery methods and systems;
- goals and objectives of County government;
- legal and political environment affecting local government;
- regulations affecting fiscal policies and practices;
- legislative process at the local, state and federal level of government;
- principles and practices of training, and management consultation.
- accounting practices;
- automated accounting and fiscal forecasting systems,
- staffing, organizational communication and automation principles and practices,
- preparation, submission, monitoring and fiscal review of contracts; interrelationships of County programs and state/federal service delivery systems.
- Skill and/or Ability to:
- conduct and report on fiscal analysis;
- project revenues;
- compile complex and detailed budgets;
- conduct and report on operational analyses;
- interpret political and administrative direction and incorporate into operational policy and procedure;
- develop policy statements and monitor implementation;
- analyze and prepare reports on complex administrative issues;
- make sound policy and procedural recommendations;
- read and interpret complex rules, regulations and legislation/laws;
- initiate study of administrative issues;
- anticipate and be ready to address concerns of superiors;
- provide consultation to departmental managers on complex operational issues;
- understand program objectives in relation to departmental goals and procedures;
- make decisions and independent judgments;
- communicate effectively both verbally and in writing;
- communicate effectively with people of diverse socio-economic backgrounds and temperaments.
- Determine the appropriate course of action in stressful situations;
- collect and analyze data to establish/identify needs and evaluate program effectiveness;
- draw logical conclusions and make appropriate recommendations;
- develop goals and objectives;
- prepare budgets, funding proposals and narrative and statistical reports;
- comply with laws, regulations and professional practices governing fiscal affairs program services and operations,
- secure cooperation and teamwork among professional and support staff;

- maintain accurate records and document actions taken; organize and prioritize work assignments;
- use proper grammar, spelling and punctuation;
- research regulations, procedures and/or technical reference materials;
- maintain confidentiality of information;
- work effectively with others who have objectives counter to assigned role;
- recognize and respect limit of authority and responsibility;
- demonstrate tact and diplomacy;
- establish and maintain cooperative working relationships.

#### **PHYSICAL REQUIREMENTS :**

- **Mobility and Dexterity:** Positions in this class typically require stooping, kneeling, reaching, occasional standing, occasional walking, pushing, pulling, fingering, grasping, feeling (i.e. sense of touch), and repetitive motion.
- **Lifting, Carrying, Pushing and Pulling -- Sedentary Work:** Employees in this class exert up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects.
- **Vision:** Positions in this class require the employee to have close visual acuity, with or without correction, to prepare and analyze data and figures, transcribe, view a computer terminal, read, etc. Employees in this class must have depth perception in order to operate a motor vehicle.
- **Hearing/Talking:** Positions in this class require the employee to perceive the nature of sounds at normal speaking levels with or without correction, and have the ability to receive detailed information through oral communication. Positions in this class require the employee to express or exchange ideas by means of the spoken word.

#### **WORKING CONDITIONS:**

- **Office Work:** Employees in this class will most often be working in an office setting.
- **Work in a Medical Clinic Facility:** Employees in this class may work in a medical clinic facility and thus will be subject to exposure to chemicals, toxic agents, blood and other bodily fluids, and communicable diseases. There may also be occasional exposure to extreme temperatures, inadequate lighting, and work space that restricts movement.
- **Traffic Hazards:** Employees in this class will be required to operate a vehicle and thus will be subject to traffic hazards while driving.

#### **OTHER REQUIREMENTS:**

- **Background Checks:** The County may conduct a background check and a reference check on candidates prior to appointment to a position within this class
- **Selectees for appointment must, as a condition of employment, sign a statement agreeing to comply with mandatory child and elder abuse reporting, drug free workforce, and confidentiality.**

- Independent Travel: Incumbents are required to travel independently, for example, to perform work at other work sites, to attend meetings with other County employees, etc.
- Hours of Work: Incumbents may be required to work weekends, holidays, irregular hours, on-call, and after normal business hours.

**CLASS HISTORY AND CLASS INFORMATION:**



---

**Director of Human Resources**

- Date Approved by the Director of Human Resources: 4/2003
- Date Class Title added to the Listing of Classes & Salaries by the Board of Supervisors: 4/2003
- Date(s) Revised: 4/20/2015
- Class Code: 107250