

CLASS SPECIFICATION
SAN DIEGO CITY CIVIL SERVICE COMMISSION
FINANCE ANALYST I - 1028

DEFINITION:

Under general supervision, to perform professional budgetary, financial, and accounting analysis of limited scope and difficulty related to Citywide budgetary control and accounting tasks; to perform financial analysis and financial statement preparation work; to work with systems and applications related to budgetary and accounting operations; to plan and analyze financial systems and forecasts; to monitor internal controls related to financial reporting; and to perform related work.

DISTINGUISHING CHARACTERISTICS:

This is the sub-journey class within the Finance Analyst series. This class is distinguished from the next higher class, Finance Analyst II, in that incumbents in Finance Analyst I positions typically exercise less independent judgment on matters related to financial analysis and work procedures and methods. In a training capacity, positions at this level may be underfilled with the classifications of Accountant Trainee, Administrative Aide II, or Management Trainee in accordance with the City's Career Advancement Program.

*** EXAMPLES OF DUTIES:**

- Assists in planning, preparing, and monitoring Citywide budget, accounting, and financial analysis/work;
- Analyzes, reconciles, and prepares a variety of financial statements, data, and information; the State Controller's report; and other financial reports;
- Prepares revenue and expenditure projections;
- Reviews, analyzes, and certifies funds available for fiscal actions submitted for Mayor and City Council approval;
- Reviews Organizational Management (OM) documents;
- Participates in the analysis of City budgetary/fiscal policy changes;
- Evaluates and documents accounting systems, business processes, and financial internal controls and provides general guidance to City staff;
- Prepares budgetary and financial reports such as balance sheets, cash flow analyses, and operating and budgetary statements;
- Responds to staff and outside agency inquiries relating to budget, accounting, and other financial matters;
- Reviews posted revenue and expenditures in funds for accuracy as well as compliance with Municipal Code requirements;
- Reviews financial data for departments;
- Analyzes financial data to prepare projections, calculations, reconciliations, and/or allocations;
- Researches and analyzes variances in revenue, expenditure, or balance sheet accounts and notes discrepancies and provides recommendations;

* **EXAMPLES OF DUTIES** performed by employees in this class. The list may not include all required duties, nor are all listed tasks necessarily performed by everyone in this class.

- Assists Auditors with questions and/or requests on various audits and accounts;
- Reviews, revises, analyzes, and approves department budgets and other financial documents to ensure validity and adherence to budget policies;
- Researches, analyzes, implements, and makes recommendations on financial requirements and fiscal policies and procedures;
- Provides fiscal guidance to City departments;
- Reviews, develops, and prepares Citywide budget and monitoring reports;
- Processes accounts payable and/or payroll and researches and resolves related issues for the City and SDCERS;
- Assists with labor cost projections for the meet and confer process of the City;
- Recommends and implements internal controls over financial reporting;
- Monitors and reviews segregation of duties in the City's SAP financial modules;
- Prepares narrative reports on specialized financial subjects.

MINIMUM QUALIFICATIONS:

Please note: the minimum qualifications stated below are a guide for determining the education, training, experience, special skills, and/or license which may be required for employment in the class. These are re-evaluated each time the position is opened for recruitment. Please refer to the most recent Job Announcement for updated minimum qualifications.

A Bachelor's degree or equivalent education (i.e., minimum completed units equal to 120 semester/180 quarter units), **AND** one year of full-time professional-level experience in the preparation of financial statements, administration, analysis, and development of budgets, and/or work of comparable complexity in the areas of Accounting, Finance, and/or Economics. Qualifying experience must include collecting financial data for one or more of the following purposes: to make financial or economic projections; research to develop/justify budgets and/or long term financial plans; to prepare financial statements; to reconcile/balance accounts; and/or to provide information for policy/business decisions or internal financial control recommendations; **OR** successful completion of 60 semester/90 quarter college units, **AND** three years full-time professional-level experience as described above.