

CLASS SPECIFICATION
SAN DIEGO CITY CIVIL SERVICE COMMISSION
FINANCE ANALYST III - 1030

DEFINITION:

Under direction, to perform the most difficult and responsible professional budgetary, financial, and accounting analysis related to Citywide budgetary control and accounting tasks; to perform complex and sensitive budgetary and financial work; to assist in the training and lead the work of professional staff or supervise the work of subprofessional and/or clerical staff; to plan, analyze, and install modifications in financial systems; to monitor, recommend, and implement internal controls related to financial reporting; and to perform related work.

DISTINGUISHING CHARACTERISTICS:

Incumbents in Finance Analyst III classification work at the super journey-level and perform the most difficult and responsible professional accounting and budgetary work. This class is distinguished from Finance Analyst II and Finance Analyst I in that Finance Analyst III positions serve as a lead analyst over professional staff or as a supervisor over subprofessional staff in a section within the Department of Finance which prepares and monitors the entire City budget, the Comprehensive Annual Financial Report, and various other financial reports.

*** EXAMPLES OF DUTIES:**

- Plans, organizes, and leads the preparation and monitoring of the Citywide budget, accounting, and financial analysis work;
- Analyzes, reconciles, prepares, and/or reviews 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;
- Directs the input and updating of data within SAP financial modules;
- Participates in the analysis of City budgetary/fiscal policy changes;
- Evaluates and documents accounting systems, business processes, and internal controls and provides general guidance to City staff;
- Reviews, analyzes, maintains, and makes recommendations on policies, Citywide internal controls, and related system procedures;
- Prepares and/or reviews budgetary and financial reports such as balance sheets, cash flow analysis, 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;

*** 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.**

- Reviews financial data for departments prior to the release of external reports;
- Analyzes and/or reviews 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;
- Assists Auditors with questions and/or requests on various audits and accounts;
- Reviews, revises, and approves budget and financial analyses submitted by City departments;
- Confers with and makes presentations to department management, internal staff, City Council, Council Committees, and outside agencies regarding fiscal policy, budget issues, and other financial matters;
- Leads professional staff and/or supervises subprofessional or clerical staff;
- Prepares and/or reviews complex budgetary and financial reports and accounting transactions;
- Administers procurement programs;
- Develops and prepares cost allocation plans;
- Makes presentations to committees and outside agencies regarding fiscal policy, budget issues, and other financial matters.
- 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;
- Provides fiscal guidance to City departments;
- Makes labor cost projections for the meet and confer process of the City;
- Prepares and pays payroll taxes and prepares W2's;
- Prepares narrative reports on specialized financial subjects;
- Monitors and reviews internal controls for financial reporting;
- Monitors and reviews segregation of duties in the City's SAP financial modules.

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** three years 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** five years full-time professional-level experience as described above.