

*Code: 5215*

*Title: FINANCE ANALYST-PRINCIPAL-FINANCE DEPARTMENT*

**SUMMARY:** This classification, used exclusively by the Central Finance Department, prepares, analyzes, reviews, monitors and/or forecasts County-wide and departmental budget, financial and operational data.

**DUTIES/RESPONSIBILITIES:** (Work assignments may vary depending on the department's needs and will be communicated to the applicant or incumbent by the supervisor.)

Conducts County-wide and departmental budgetary and financial studies concerning current and projected fiscal and operational matters, and develops recommendations on feasibility of initiating new programs and maintaining or expanding existing services;

Establishes work plans, gathers and analyzes financial and operational data, and prepares reports, listing assumptions, methodologies, findings and recommendations;

Conducts revenue and expenditure forecasting studies and conducts financial impact analyses;

Reviews, analyzes, monitors, evaluates and reports findings related to specifically designated County expense and revenue contracts;

Prepares, analyzes, reviews, evaluates, and monitors County-wide and multiple departments' operating and Capital Improvement Program (CIP) budget requests;

Analyzes County-wide and multiple department's requests for capital improvement expenditures, obtains information for new requests, and recommends appropriate levels of funding;

Updates County-wide and multiple department's operating and capital budgets to reflect operating and funding changes;

Researches, analyzes and makes recommendations on department's requests for additional funding;

Researches, analyzes, and develops recommendations on department's requests for amendment to the approved CIP;

Monitors and evaluates County-wide and multiple departments' operating and CIP budgets and develops a report on findings with appropriate recommendations;

Provides technical assistance to multiple departments engaged in budget preparation by explaining budget procedures and process to insure mutual understanding of the budget requests and in the use of automated Financial Planning System (FPS);

Provides zero base budget training (e.g. program/services structure, line-item justifications, goals/objectives/performance measures etc.) to all county departments;

Analyzes the fiscal impact of changes to legislation considered or enacted by the local, State and Federal government;

Designs econometrics models to forecast departmental expenditures and revenues, identifies anomalies and prepares monthly and annual reports on long-term projections;

Develops projections and trends using microcomputer software for modeling and forecasting;

Interprets and applies established policies and procedures relating to the operating and Capital Improvement Programs (CIP) budgets and develops recommendations for their revision;

Interprets the budget amendment process for departments;

Participates in the design, development and testing of the FPS system, screens, and reports;

Prepares the FPS for annual distribution and use by all County departments;

Researches and gathers various benefits and other information for inclusion in the FPS, including health, social security, workers' compensation, unemployment insurance, and retirement;

Contacts all taxing jurisdictions in Pima County and complies listing of property tax rates and levies, as part of the annual Tax Assembly process;

Answers tax payers questions concerning property taxes;

Prepares multiple sections for the annually published Pima County Recommended and Adopted Budget Books.

**KNOWLEDGE & SKILLS:**

Knowledge of:

- . data collection, research and fiscal audit methods, designs and techniques.
- . mathematics and statistics as they apply to budgetary control and financial management;
- . general governmental financial and budgetary principles and practices;
- . automated accounting systems, and word processing, spreadsheet and database applications.
- . the methods and techniques of financial management and budget preparation and analysis;
- . Federal, State and local laws and regulations as they apply to budget and financial management.

Skill in:

- . researching, analyzing, interpreting and auditing financial and budgetary data and preparing reports on findings;
- . developing logical conclusions and preparing recommendations;
- . performing applicable statistical and mathematical analysis;
- . communicating effectively, both orally and in writing;
- . identifying budgetary problems and developing concise recommendations for revision and improvement;
- . developing long-/short term financial forecasts;
- . using a computer to produce reports and spreadsheets;
- . analyzing management systems and operating efficiencies;
- . use of computer-based resources to facilitate assigned work.

**MINIMUM QUALIFICATIONS:** EITHER:

(1) A Bachelor's degree from an accredited college or university with a major in public or business administration, finance, accounting, economics, or a related field and two years of professional level budget, auditing or accounting analysis, financial management research, or fiscal administration experience.

OR:

(2) Two years of departmental experience as a Principal Finance Analyst with Pima County.

OR:

(3) Two years of central or departmental experience as a Principal Finance Accountant with Pima County.

**OTHER REQUIREMENTS:**

**Physical/Sensory Requirements:** Physical and sensory abilities will be determined by position.

This class specification is intended to indicate the basic nature of positions allocated to the class and examples of typical duties that may be assigned. It does not imply that all positions within the class perform all of the duties listed, nor does it necessarily list all possible duties that may be assigned.