

CITY OF BIG BEAR LAKE

CLASS SPECIFICATION

Class Title: Financial Analyst

Class Code Number: 3060

Position Designation: Professional/Mid-Management

Division: Finance

General Purpose of Position

This position provides professional level accounting and administrative services to the Finance Department. This position helps develop and meet Department objectives. This position supervises Finance Department staff as directed by Finance Manager and reports to the Finance Manager.

RESULTS STANDARDS

Results Standards set guidelines for the quality and correct procedure expected when performing any task for the City of Big Bear Lake.

I. Customer Service:

Government service is provided in a professional and effective manner with an emphasis on responsiveness and accessibility to both employees and the public.

II. Professionalism:

Job duties are consistently performed in a legal and ethical manner consistent with the code of conduct and standards applicable and appropriate to the position and particular specialized area.

III. Production:

Employee labor products are of high quality and are produced in a timely and cost-effective manner.

IV. Critical Thinking:

Decisions are made utilizing appropriate problem identification, analysis, and evaluation processes with a continual emphasis on innovation, ethics, and professionalism.

V. Teamwork:

Goals common to the organization are achieved through cooperation, coordination, and the development of professional relationships.

VI. Professional Development:

Employees are empowered to perform their jobs at the highest level and are encouraged to improve both personally and professionally. The overall quality of professionalism in the organization is improved through commitment, training, involvement, and education.

VII. Leadership:

Efficiency, effectiveness, and teamwork are promoted by all employees. The values of the City are properly communicated through the behavior of organizational leaders in a manner appropriate to their position.

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FORMAT

Result Statements: (in bold) describe common results expected of the Department or results specific to a particular position.

Performance Standards (preceded by a) describe the specific manner in which the associated Result Statement is achieved by this position. Multiple Performance Standards can be associated with each Result Statement and define the expectations for employee performance.

A. General ledger accounting is provided to track City accounts.

- The general ledger is balanced and reconciled in accordance with generally accepted principles of accounting.
- Postings are made to the general ledger.
- Transactions are classified and the impact on assets, liabilities, and reserves is analyzed.
- Analysis of fiscal transactions is completed to ensure compliance with generally accepted accounting principles.
- The computer accounting system is maintained through training staff, facilitating enhancements, troubleshooting, and other appropriate duties of the system administrator.

B. Financial reporting, auditing, and fixed asset management are conducted to ensure that sound accounting and financial procedures are being followed; City, State, and Federal guidelines are adhered to; money is properly appropriated and accounted for.

- Fiscal operating data is collected, analyzed, and summarized in various financial reports to management, City Council, etc.
- Year-end accounting/auditing work papers and journal entries are prepared to comply with generally accepted accounting principles.
- Project Management or annual fixed asset accounting updates are performed in accordance with City procedures as directed by the Finance Manager.
- Project Management or fixed asset records for various City funds are maintained and reconciled as directed by the Finance Manager.
- Special projects are coordinated, administered and evaluated at the direction of the Finance Manager.

C. Payroll, accounts payable, accounts receivable, purchasing, and cash disbursement services are provided in a timely and accurate manner.

- Cash receipt documentation and registers are reviewed to ensure proper posting of City revenues.
- Disbursement (check request) documentation is reviewed to ensure proper classification of City expenses.

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- Procedures are reviewed on a regular basis and adjusted when appropriate to ensure compliance with applicable guidelines and maximize effectiveness.
- Payroll records are reviewed to ensure proper classification and compliance with State and Federal regulations.
- Support is provided for payroll processing as directed by the Finance Manager.
- D. The supervisory responsibilities of the Finance Department and/or receptionist are carried out as directed by the Finance Manager.**
- Supervise, train and evaluate technical and clerical staff.
- Assign and coordinate the work of technical and clerical staff within the Department.

Qualifications

Education: A Bachelor's degree in Accounting, Finance, or related field is required.

Experience: Three years of finance experience for a public sector organization, or equivalent experience is required.

Knowledge, Skills, Abilities, and Personal Characteristics

This position requires the knowledge and ability to use sound statistical and research techniques. Knowledge of the principles and practices of personnel administration, public sector finance, community development functions, and public administration is required depending on assignment.

The individual should be able to exercise sound judgment, be able to plan, be well organized, have excellent verbal and written communication skills, work well under pressure, and be proactive, flexible, and cooperative. The individual must be accurate, timely, discreet and able to maintain confidentiality on appropriate issues.

Physical Requirements

The following requirements are representative of those that must be met by an employee to successfully perform the essential functions of this job. This position may require extended periods of sitting. Light lifting (up to 25 lbs.) is required occasionally. This position requires manual manipulation of a keyboard, phone, and other standard office machines.

Tools

This position requires the use of a PC, word processing, and spreadsheet software, and standard office equipment.

Work Environment

Work will be performed in an office at City Hall exposed to moderate levels of noise. The majority of work associated with this position will be performed sitting down, word processing or answering the phone. This position involves a substantial amount of contact with both employees and citizens both face to face and over the telephone.