

**COUNTY OF SOLANO  
POLICY AND FINANCIAL ANALYST**

**Est. 4/03  
CSC Exempt**

**DEFINITION**

Under general direction of the Assistant Director of Health and Social Services for Operations or Assistant Director of Research and Planning, 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.

**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. Direction is received from the Assistant Director of Health and Social Services - Operations or the Assistant of Director of Health and Social Services - Research and Planning depending on the assignment.

**SUPERVISION RECEIVED AND EXERCISED**

General direction is provided by the Assistant Director of Health and Social Services – Operations or the Assistant Director of Health and Social Services - Research and Planning.

Responsibilities may include supervision over assigned Staff Analysts, Accountants, clerical and technical staff.

**EXAMPLES OF DUTIES:**

Duties may include, but are not limited to, the following:

1. 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.
2. 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.

**EXAMPLES OF DUTIES (Continued)**

3. 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.
4. Provides consultative direction to managers on matters related to organizational and/or operational effectiveness.
5. 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.
6. Assists in the development and implementation of fiscal plans and policies; prepares comprehensive budget documents; reviews and monitors overall expenditures and revenues.
7. 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.
8. Supervises all assigned staff; provides guidance to staff in operational/fiscal analysis, effective consultation/presentation style and other matters.
9. May be assigned specific operational authority over projects, services and/or operations; assists in training of analyst and technical staff.

**QUALIFICATION GUIDELINE**

**Education and/or Experience**

Extensive professional level public sector administrative staff experience which included fiscal, operational, and policy analysis coupled with education and/or training which demonstrates possession of and competency in requisite knowledge and abilities. Qualification Requirements are as follows:

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.

**QUALIFICATION GUIDELINES (Continued)**

And

A Bachelors 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.

**KNOWLEDGE/SKILLS/ABILITIES**

**Thorough 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.

**Considerable knowledge** of accounting practices; automated accounting and fiscal forecasting systems, staffing, organizational communication and automation principles and practices, interrelationships of County programs and state/federal service delivery systems.

**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

**KNOWLEDGE/SKILLS/ABILITIES (Continued)**

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.

**SPECIAL REQUIREMENTS**

Incumbents must be able to work in an environment, which may include exposure to communicable diseases.

Possession of or ability to obtain a valid Class C California driver's license may be required.

**SUPPLEMENTAL INFORMATION**

Independent travel may be required.

Selectees for employment must, as a condition of employment, sign a statement agreeing to comply with mandatory child and elder abuse reporting, drug free workforce and confidentiality.

This position is exempt from provisions of the County's Civil Service Ordinances. Incumbents are hired and retained at the pleasure of the appointing authority.

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Department Head

Date

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