



BOARD OF SUPERVISORS AGENDA ITEM REPORT

Requested Board Meeting Date: July 7, 2020

Title: Classification and Compensation Matters - New Classification

Introduction/Background:

A new job classification was requested by the Finance and Risk Management Director for the position of Financial Analyst to perform entry level professional financial services for the department.

Discussion:

The Finance and Risk Management department wants to add an entry level Financial Analyst job classification to the current Financial Accountant/Analyst Series. This position will assist in analyzing County wide budget proposals, conduct financial research and identify trends. An entry level Financial Analyst job classification will aid the department in attracting and recruiting recent college graduates.

Conclusion:

This proposed new Financial Analyst job classification will provide an accurate description of the work assigned to the positions that will provide entry level financial analysis support services to the central Finance and Risk Management department.

Recommendation:

It is recommended that the Class Code 1364, Class Title Financial Analyst, Salary Grade 53, Salary Range \$50,814 - \$76,336 annually, EEO Code 2 (Professional), FLSA Code Exempt (not paid overtime), be approved for use within the County's classification system.

Fiscal Impact:

The creation of this new job classification has no immediate cost impact to the County as any additional costs incurred in hiring positions allocated to this job classification will be borne by the department from within its current budget. Cost impact in future budget years will be planned for by the department through the County's normal budget process.

Board of Supervisor District:

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☒ All

Department: Human Resources

Telephone: 724-8028

Contact: Colin Smith


Telephone: 724-8111

Department Director Signature/Date: _____

 6/29/2020

Deputy County Administrator Signature/Date: _____

County Administrator Signature/Date: _____

 6/29/20

Code: 1364

Title: FINANCIAL ANALYST

SUMMARY: Assists in analyzing Countywide departmental and Capital Improvement Program (CIP) budget proposals, conducts research on budgetary matters, applies trend analysis to project year end amounts, and monitors departmental revenue and expenditures for compliance with adopted budgets. Also responsible for assisting in the functional administration of business and financial systems used Countywide. This classification is used exclusively by the Finance and Risk Management Department.

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

Assists in preparing, analyzing, reviewing, evaluating and monitoring Countywide and multiple departmental operating and CIP budget requests;

Assists in Countywide and departmental budgetary and financial studies concerning current and projected fiscal and operational matters, and develops recommendations on the feasibility of initiating new programs and maintaining or expanding existing services;

Assists in providing technical assistance to departments engaged in budget preparation by explaining financial policies, procedures and processes to insure mutual understanding of request and proper use of automated budget system;

Assists in the development of initial recommendations for department core funding levels based on revenue and expenditure projections overall program budgets and departmental performance measures;

Assists in compiling, analyzing and preparing budget data for publication in the annual Countywide Requested, Recommended and Adopted Budget documents;

Processes business and financial system user security access and approval workflow requests;

Uses internal tools and procedures for reconciling and balancing financial data between multiple systems;

Assists with providing user support and troubleshooting issues for business and financial systems used Countywide;

Assists with testing of enhancements and configurations of business and financial systems used Countywide;

Creates and maintains chart of account elements in the County's financial system;

Assists in ensuring county inventory is safeguarded by conducting reconciliations and observing departments are utilizing proper controls;

Assists in the preparation of internal financial and budget reports by gathering, analyzing, tabulating and interpreting data;

Assists in monitoring multiple departments' spending throughout the year and assists in gathering data to be used to provide recommended forecast data;

Gathers information for multiple departments' programs, goals and objectives and compiles the data to be used to analyze those targets.

KNOWLEDGE & SKILLS:

Knowledge of:

- County policies and procedures;
- automated accounting systems, spreadsheet and database applications;
- methods and techniques of financial management and budget preparation and analysis;
- data collection, research techniques, methodologies and analysis methods;

- principles and practices of budgeting and accounting.

Skill in:

- communicating effectively, both orally and in writing;
- identifying problems and developing clear, concise and logical conclusions and recommendations;
- researching, analyzing, interpreting and auditing financial and budgetary data and preparing reports on findings;
- performing statistical and mathematical analysis.

MINIMUM QUALIFICATIONS:

EITHER:

(1) A Bachelor's degree from an accredited college or university with a major in accounting, finance, economics, public or business administration or a closely related field as defined by the appointing authority at the time of recruitment.

OR

(2) An Associate's degree with a focus in accounting, finance, economics, public or business administration or a closely related field as defined by the appointing authority at the time of recruitment from an accredited college or university and two years of professional experience in accounting, budgeting, auditing or accounting analysis, or financial management research.

(Additional relevant experience and/or education from an accredited college or university may be substituted.)

OTHER REQUIREMENTS:

Licenses and Certificates: Some positions require a valid Arizona Class D driver license at the time of application. Failure to maintain the required licensure shall be grounds for termination.

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

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

Pima County

Proposed New 6/2020