



PRINCIPAL MANAGEMENT ANALYST

DEFINITION

Under general direction, performs difficult and complex City-wide budgetary, financial, economic, statistical, administrative, and analytical support duties; develops, manages, monitors, and reviews the activities of major and significant City-wide operations, projects, and programs that often require working with the complicated logistics of interdepartmental and/or interagency cooperation; makes recommendations for action; facilitates policy, procedure, and budget development and implementation; and performs related duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the City Manager, Director of Administrative Services or designee. May exercise general supervision over professional, technical, and clerical staff.

CLASS CHARACTERISTICS

This is the advanced journey-level classification in the Management Analyst class series. Incumbents are expected to perform the full range of duties with only occasional instruction or assistance as unusual or unique situations arise and exercise a high level of discretion, initiative, and independent judgement; incumbents have considerable latitude to exercise independent judgement and decision-making, particularly when managing and administering assigned programs/projects.

Positions are normally assigned to the Department of Administrative Services.

This class is distinguished from the Management Analyst in that the latter is the journey-level class in the series and has responsibility performing a wide variety of duties for an assigned area such as finance, budgets, human resources, risk management, grants, contracts, and administrative functions.

ESSENTIAL DUTIES

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

- Plans, oversees, and manages the City's financial planning, budgeting functions, and payroll. This includes the analysis of financial data, trends, and projecting future income and expenses and modeling the outcomes of various alternative scenarios; administers City-wide budgets to ensure that budget priorities are properly executed.
- Plans, facilitates, and conducts complex budgetary, financial, and operating analyses and studies in the preparation of the City's annual budget including capital and operating budgets, financial strategies, fee studies, interim reports, organizational changes, and related documents. Develops recommendations when dealing with uncertainty due to rapidly changing

program and financial/budgetary deadlines and objectives, gaps and conflicts in program and financial/budgetary information, and changing guidelines.

- Monitors and interprets various external factors, such as economic conditions, new legislation, and state and federal funding changes to determine the impact on City finances; develops policies, procedures, standards, and ordinances to ensure compliance with applicable laws and regulations.
- Provides guidance as a recognized budget subject matter expert and advisor in various programmatic areas; plans, manages, and participates in the development and implementation of Citywide operation business standards, processes, policies, procedures, and performance measurements; analyzes, evaluates, and develops recommendations for changes as necessary and appropriate; directs the development and maintenance of operating procedures/manuals.
- Coordinates and oversees the City annual insurance renewal process; provides data to the underwriter for updated values, finance data, etc. and adjust budgets for estimated increases or decreases.
- Coordinates and oversees the City's compensation processing; interprets, educates, and applies a variety of laws and regulations governing payroll administration; conveys and enforces payroll policies related to earnings, deductions, timekeeping, and government compliance reporting.
- Provides policy, program, and procedural direction to assigned teams and areas of responsibility; reviews financial reports and budgets to provide fiscal direction; manages and directs preparation of the compensation budget and makes recommendations in support of City's goals and objectives.
- Monitors contracts and agreements for compliance, achievement of objectives, and adherence to performance and fiscal requirements; assists departments with preparation of agreements when appropriate.
- Develops and provides training on the budget process to City staff.
- Identifies, plans, implements, and evaluates goals, objectives, priorities, and activities within assigned areas of responsibility in a manner consistent with the City's overall goals and objectives including developing strategies for the successful achievement of such.
- Plans, directs, manages and monitors various administrative and operational analyses, studies, and audits; manages and participates in data collection for needs assessments, benchmarking, and operational reviews of designated responsibilities; evaluates success and provides feedback of the operational analyses, studies, or audits.
- Interprets and applies provisions of laws, rules, policies, procedures and regulations related to assigned areas and advises staff of such.
- Performs supervisory duties as assigned, which may include professional, technical, and clerical staff within assigned areas of responsibility; acts as a resource to staff; advises staff on the more complex issues; provides direction, guidance, and leadership to staff; may prepare or provide input to performance evaluations.
- Represents the department and frequently takes the lead role on committees and task forces which have City-wide impact and required coordination; coordinates assigned activities with other divisions, departments, governmental agencies, and outside organizations.

- Attends and/or makes presentations at council, interagency, committee, and other meetings and conferences; acts as liaison between outside agencies and the City, including but not limited to serving as a primary or back-up for the Northern California Cities Self Insurance Fund Board of Directors.
- Performs related duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles and modern methods of public and business administration with special reference to organization, budgeting and accounting, and public policy.
- Advanced principles and practices of public finance, budgeting, fiscal control, cost allocation, and administrative policy analysis.
- City organization and functions; laws, rules, codes, and regulations related to assigned areas of responsibility.
- Generally accepted accounting principles, governmental accounting standards, and other pertinent governmental accounting and reporting procedures.
- Public agency contracting requirements, grant applications and fiscal control.
- Advanced research and analytical methods, techniques, and procedures.
- Principles of long-range financial planning and methods.
- Communication techniques required for gathering, evaluating and transmitting information and directing group discussions.
- Principles and practices of project planning, project management, and software system design (e.g. MUNIS, Timekeeping system, TCM, etc.).
- Principles and practices of making presentations.
- Principles and practices of supervision, training, and personnel management.
- Administrative principles and methods, including goal setting, program and budget development, implementation, and control; personnel management and supervision.
- Records management principles and practices.
- Techniques for providing a high level of customer service to the public and City staff, in person and over the telephone.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Modern equipment and communication tools used for business functions and program, project, and task coordination.
- Computers and software programs (e.g., Microsoft software packages) to conduct, compile, and/or generate documentation.

Ability to:

- Prepare, implement, and monitor Citywide budget activities.
- Develop, implement, and interpret goals, objectives, policies, procedures, and work

standards.

- Independently research, analyze and make sound recommendations on administrative, management, organizational, budgetary and fiscal practices, procedures and issues.
- Collect, evaluate, and interpret varied information and data, either in statistical or narrative form.
- Plan, organize, assign, train, supervise, review and evaluate the activities and staff of assigned program areas within the Administrative Services Department.
- Utilize discretion in the handling and disclosure of confidential information.
- Gain cooperation through discussion and persuasion.
- Prepare and present clear, concise, and logical written and oral reports.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent the department and the City in meetings with governmental agencies; community groups; various business, professional, and regulatory organizations; and in meetings with individuals.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Attend, represent the department, and make presentations at Council, interagency committees, and other meetings.
- Exercise sound independent judgment within established guidelines.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Effectively use computer systems, software applications, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.

Education and Experience

Possession of a bachelor's degree from an accredited four-year college or university with major coursework in in public or business administration, finance, accounting, economics, or a closely related field;

AND

Five (5) years of increasingly responsible professional experience in financial or administrative analysis which included performing budgetary duties. Two (2) years of the required experience in a comparable public agency is desirable.

Licenses and Certifications

- Possession of, or ability to obtain and maintain, a valid California Class C Driver License and a satisfactory driving record is required. Individuals who do not meet this requirement due to a disability will be reviewed on a case-by-case basis.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; the ability to operate a motor vehicle to visit various City sites and attend off-site meetings; vision to read printed material and view a computer screen; hearing and speech to communicate in person, before groups, and over the telephone; finger dexterity to operate standard office equipment and access, enter, and retrieve data using a computer keyboard and calculator; the ability to bend, stoop, kneel, reach, and push and pull drawers open and closed to retrieve and file information; and occasionally lift, carry, push, and pull materials and objects up to 20 pounds to perform the required job functions. Reasonable accommodations will be made for individuals on a case-by-case basis.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances. Employees may interact with upset individuals in interpreting and enforcing departmental policies and procedures.

WORKING CONDITIONS

Employees may be required to work evenings, weekends, and holidays, as well as participate in afterhours on-call assignments.

All City of Rocklin employees are designated as Emergency Service Workers during a proclaimed emergency and may be required to perform certain emergency services at the direction of the department and/or City.

This class specification should not be construed to imply that these requirements are the exclusive standards of each position as not all duties are necessarily performed by each incumbent.

Adopted	August 2012
Revised	September 2018, July 2022
FLSA	Exempt
Salary Schedule	Management/Range 20