



**EMPLOYMENT OPPORTUNITY**

**OPENS**  
**JAN. 16, 2019**

**FINANCIAL ANALYST**  
**\$34.35 – \$43.85 per hour**

**CLOSES**  
**FEB. 15, 2019**

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*Salaries are on a six-step salary range schedule with 5% increases yearly*

**SUPPLEMENTAL QUESTIONNAIRE IS REQUIRED FOR THIS RECRUITMENT**

**DEFINITION:**

Under general supervision, a Financial Analyst performs a range of journey level professional analytical duties related to centralized Santa Cruz METRO budgetary and other financial functions, processes and projects; participates in the annual organization wide budget process and prepares budget documents; researches, analyzes and forecasts trends related to budget, project, financial and accounting issues; participates in strategic planning activities related to projected revenues and expenditures; performs periodic and ongoing operational financial analysis and reporting; and performs related work as required.

**DISTINGUISHING CHARACTERISTICS:**

Financial Analyst is the journey level class in the series. An incumbent in this class performs a range of journey level professional financial analytical duties while learning to perform the full scope of financial analytical work. This class may be distinguished from the higher-level class of Senior Financial Analyst because an incumbent in the latter class performs the full scope of advanced level financial analytical work.

**EXAMPLES OF DUTIES AND RESPONSIBILITIES:**

*The duties listed below represent the various types of work that may be performed. The omission of specific statements of duties does not exclude them if the work is related or a logical assignment to this class.*

Performs a range of journey level professional analytical duties to support centralized Santa Cruz METRO budgetary and other financial functions, processes, and projects, while learning to perform the full scope of advanced level financial analytical work. Participates in the annual organization wide budget process; assists in gathering information from various internal and external data sources; analyzes past trends; coordinates with department directors and budget support personnel to prepare departmental non-personnel budgets; develops the labor and fringe benefit budget projections; develops and prepares budget documents as assigned. Forecasts expenditures in accordance with current labor contracts, laws, and economic conditions; develops budget revenue projections using statistical models, historical revenue and ridership data, as well as current economic indicators. Participates in the development of Santa Cruz METRO’s five and ten-year Strategic Plan; assists in researching, analyzing, and summarizing information for management consideration and planning; provides financial recommendations and forecasts. Writes monthly budget status reports; prepares presentations to inform the Board of Directors and the public regarding Santa Cruz METRO’s actual revenues and expenses in relation to the adopted operating and capital budgets. Assists in administering Santa Cruz

METRO's timekeeping software by providing and editing user access and security permissions, creating new pay policies and pay codes, auditing system outputs and coordinating with Information Technology staff to identify business needs and resolve technical problems. Calculates pay rates for all bargaining units and management classes for purposes of labor negotiations, wage surveys, and classification and compensation studies; assist in preparing operating cost effects of potential labor contracts and service enhancement; prepares multi-year scenarios and forecasts. Prepares invoices and trust warrants for union-related payments and charges. Participates in the preparation of the annual budget book and automated budget tracking templates; uploads budget files for purchasing and accounting software. Assists with special projects. Develops and maintains a wide variety of financial records, reports, reporting tools and other documents; prepares correspondence; may present to individuals and groups. Provides information to employees and the public. Because this position reports to the Finance department, it will also serve as the backup for the Senior Payroll Specialist performing the full range of duties related to timekeeping and payroll preparation, to ensure the timely and accurate completion of payroll for all Santa Cruz METRO employees. Operates standard office equipment; utilizes standard business computer software in performing job tasks. May utilize specialized Santa Cruz METRO software. Drive a Santa Cruz METRO vehicle to perform assignments. Performs related work as required.

#### **EMPLOYMENT STANDARDS:**

##### **Knowledge of:**

Principles, practices, forms, and techniques of professional public sector finance, budgeting and accounting. Principles and best practices of public agency budgeting, including revenue forecasting. Principles and practices of operational and financial research and analysis. Public sector best practices regarding record keeping and reporting. Laws and regulations applicable to public sector finance, taxes, payroll reporting and transit agencies. Financial and statistical reporting and analysis. Business law principles and practices. Public sector accounting terminology and methods. Modern office practices, procedures and equipment. Business correspondence, formatting, and report writing. Methods of maintaining information in computerized or hard copy files. Professional methods of researching, gathering, organizing and reporting data. Project management methods. Methods of prioritizing, planning, and organizing work. Advanced time management techniques. Customer service techniques. Intermediate mathematics including percentages, intermediate statistics, and financial data conventions. The effective use of modern office equipment, personal computers, and standard business software, including specialized financial applications.

##### **Ability to:**

Plan, organize, coordinate, prepare, and control budgets. Perform a wide variety of intricate, professional financial analysis tasks and studies in compliance with applicable laws, regulations, and policies. Evaluate, interpret, and apply laws, regulations, policies, procedures, and requirements pertaining to organizational financial activities. Analyze intricate financial, statistical, accounting and payroll information and formulate sound conclusions and recommendations. Assess economic conditions and determine economic assumptions for financial forecasts. Maintain complex financial and statistical data and records. Consult with and advise management on a wide variety of financial issues. Utilize financial and budgeting software, including spreadsheet, database, finance and payroll applications. Apply professional fiscal control procedures to maintain budgetary accounts. Perform financial calculations quickly and accurately. Adhere to established work schedules and timelines. Work independently using good judgment, tact, and discretion. Balance multiple assignments simultaneously and effectively. Utilize standard office equipment and computer software and learn to use specialized Santa Cruz METRO software if assigned. Maintain confidentiality of materials, records, files and other privileged information. Communicate clearly

and effectively in both oral and written form. Establish and maintain effective working relationships within the department and with other divisions, departments, agencies, suppliers, vendors, and the public.

**MINIMUM QUALIFICATIONS:**

*Any combination of experience and education that would likely provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:*

**Education, Training and Experience:**

Bachelor's degree from an accredited college or university in finance, accounting, economics, business administration, or a related field.

**AND**

Two (2) years of professional financial analytical experience, preferably in a public agency.

**LICENSES AND CERTIFICATES:**

A valid California Driver's License will be required at the time of appointment and throughout employment. Must be able to obtain and maintain a current, valid California Class "C" Driver's License.

**SPECIAL REQUIREMENTS:**

Must maintain strictest confidentiality of information. May require occasional travel.

**PHYSICAL AND MENTAL DEMANDS:**

*The physical and mental demands described here are representative of those that must be met by employees to successfully perform the essential functions of this class. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.*

While performing the duties of this job, the employee is frequently required to reach with hands and arms; walk, sit and stand; use finger dexterity; talk and hear; and use a keyboard. Work often requires the repetitive use of both hands to grasp and feel objects; stooping at the waist; and standing. Work may require lifting up to 20 pounds unaided. Specific visual abilities required for this job include close vision, distance vision, the ability to see colors and shades, and the ability to perceive depth.

**Mental Demands:**

While performing the duties of this job, an employee uses written and oral communication skills; reads and interprets data, information and documents; analyzes and solves problems; uses math and mathematical reasoning; performs highly detailed work; deals with multiple concurrent tasks; and interacts with others encountered in the course of work.

**Work Environment:**

The employee typically works in a standard office environment where the noise level is usually moderate.

**OTHER CONDITIONS OF EMPLOYMENT:**

Must pass requisite background check. May occasionally work extended hours or hours outside of regular schedule.

**HOW TO APPLY:**

Visit our website, [www.scmted.com](http://www.scmted.com) to complete our on-line application. Resumes will not be considered in place of the line application. On-line applications must be submitted by 5:00pm on February 15, 2019.

**SCROLL DOWN FOR SUPPLEMENTAL QUESTIONS**



3. Describe your data management and analysis skills. Include specific examples that would demonstrate your level of expertise using excel and database applications (or tools such as SQL, Access, etc...)

4. Please describe your training and experience in relation to timekeeping/payroll processing for a department or company.