

SENIOR MANAGEMENT ANALYST

DEFINITION

Under general direction, plans and provides administrative, budgetary, grants administration, strategic planning, purchasing and procurement, contract administration, and work-flow support to an assigned department; analyzes departmental practices and procedures and makes recommendations for organizational, operational, policy, budgetary, and procedural improvements; conducts needs analyses, feasibility studies, and evaluation for assigned projects and programs; develops, summarizes, and maintains administrative and fiscal records; fosters cooperative working relationships among City departments and acts as liaison with various community, public, and regulatory agencies; and performs related work as required.

MANAGEMENT RESPONSIBILITY

Receives general direction from management personnel. May exercise supervision over assigned staff.

CLASS CHARACTERISTICS

This is the advanced journey-level class in the management analyst series. Incumbents plan, develop, and implement policies and procedures for an assigned department, including multi-divisional and/or departmental budget preparation, management and organizational analysis, and program evaluation. Incumbents facilitate and support the work of departmental management staff by organizing day-to-day administrative support activities and by providing a professional-level resource for organizational, managerial, and operational analyses and studies. Responsibilities include performing diverse, specialized, and complex work involving significant accountability and decision-making responsibility, and may involve frequent contact with the public. This class is distinguished from the Chief Management Analyst classification in that the latter leads, trains, and oversees assigned staff and performs the most complex organizational, managerial, financial, regulatory, policy, and operational analyses and studies.

SENIOR MANAGEMENT ANALYST cont.

EXAMPLES OF DUTIES

Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

Assists in developing goals, objectives, policies, procedures, work standards, and administrative control systems for assigned department, programs, and projects; Coordinates and performs professional-level administrative work in such areas as budget development, financial administration and reporting, grants administration, database management, contract administration, procurement and purchasing, management analysis, strategic planning, and program evaluation; Coordinates the preparation and administration of the annual budget for the department; calculates cost distribution and provides financial forecasting and planning; tracks the adopted budget and prepares periodic budget reviews for submission to department management and the department head; identifies and recommends resolutions for budgetary problems; Monitors current-year budget; analyzes and reconciles expenditures and revenues and identifies funding gaps; prepares profit and loss statements; generates and prepares various year-end financial reports; prepares reports and data for external auditors and assists during the auditing process; Plans, designs, develops, organizes, and administers multiple highly complex department-specific programs and projects; develops and manages program budgets, including revenue projections, multi-year cash flow analysis, cost containment, and grant funds disbursement; directs all aspects of assigned programs, including legal and regulatory compliance; Develops and implements new or revised programs, systems, procedures, and methods of operation; compiles and analyzes data, and makes recommendations regarding staffing and operational needs; Conducts a variety of analytical and operational studies and surveys regarding departmental and programmatic activities, including complex financial, budget, personnel, operational, or administrative issues or questions; evaluates alternatives, makes recommendations, and assists with the implementation of procedural, administrative, and/or operational changes after approval; prepares comprehensive technical records and reports, identifies alternatives, and makes and justifies recommendations; Prepares and administers Request for Proposal (RFP) and Notification of Bid (NIB) processes; reviews, suggests changes to, and finalizes specifications and Scope of Work; verifies vendor list; reviews and conforms RFP and NIB packages; conducts pre-bid meetings; receives and reviews bids; prepares evaluation tools and reviews with evaluation committee; conducts and facilitates evaluation meetings; sends outcome notification letters; assists in contract preparation and distribution; requests insurance certificates and required documentation; Participates in establishing new contracts and creating new procedures and guidelines to existing contracts that need improvement or that are up for potential renewal; develops and administers complex contracts including maintenance, goods, or service contracts and agreements; monitors contract expenditures and identifies budget transfers as needed; Participates in the development and reporting of alternate funding sources and ensures compliance with federal, state, local, funding agency, City

SENIOR MANAGEMENT ANALYST
EXAMPLES OF DUTIES cont.

accounting and reporting requirements, and applicable laws, regulations, and professional accounting practices; Provides technical guidance to management and department staff pertaining to areas of responsibility; Prepares and submits City Council agenda reports and various other commission, committee, and staff reports, resolutions, ordinances, and correspondence regarding assigned activities; Confers with other management staff regarding provision of administrative and support services, including contracts, agreements, and grant reporting; Plans, organizes, coordinates, and conducts public events such as public hearings and community meetings regarding service changes; May manage specialized department databases; meets with supervisory, management, and department staff to identify system needs; oversees department's performance monitoring and reporting, including department work plans; plans and forecasts workload and routinely assesses progress against established work plans; Serves as a liaison to employees, public, and private organizations, community groups, and other organizations; provides information and assistance to the public regarding the assigned programs and services; receives and responds to complaints and questions relating to assigned area of responsibility; reviews problems and recommends corrective actions; Maintains accurate records and files; develops storage of records and retention schedules; Represents City to residents in explaining City and departmental policies; participates on a variety of interdisciplinary committees and commissions and represents the City to a variety of community and stakeholder groups; Communicates orally, in writing, or through graphic representations and statistical summaries with colleagues, managers, employees, the public, organized employee groups, and representatives of various organizations; and, Performs related duties as assigned.

EMPLOYMENT STANDARDS

Knowledge of:

- Administrative principles and practices, including goal setting, program development, implementation, and evaluation, and project management.
- Governmental finance and accounting principles and procedures, including developing, implementing, and administering a municipal budget.
- Procedures, policies, rules, and practices affecting the development, maintenance and control of fiscal record keeping systems, including automated finance and accounting systems.
- Project and/or program management, analytical processes, and report preparation techniques; municipal programs such as, but not limited to, finance, budgeting, grants, contracts, purchasing and procurement, and other related governmental programs.
- Applicable Federal, State, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.

**SENIOR MANAGEMENT ANALYST
EMPLOYMENT STANDARDS cont.**

- Organization and management practices as applied to the development, analysis, and evaluation of programs and operational needs of the assigned function.
- Research and reporting methods, techniques, and procedures.
- Sources of information related to a broad range of municipal programs, services, and administration.
- Recent and on-going developments, current literature, and sources of information related to the operations of the assigned division.
- Record keeping principles and procedures.
- Modern office practices, methods, and computer equipment and applications related to the work.
- English usage, grammar, spelling, vocabulary, and punctuation.
- Techniques for effectively representing the City in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and City staff.

and

Ability to:

- Recommend and implement goals, objectives, policies, procedures, and work standards for providing effective and efficient services for assigned programs.
- Prepare, implement, administer, and monitor large budgets.
- Analyze, interpret, summarize and present financial, administrative, and technical information and data in an effective manner.
- Conduct programmatic administrative, budgeting, and fiscal reporting activities.
- Perform responsible and difficult administrative work involving the use of independent judgment and personal initiative.
- Plan and conduct effective management, administrative, and operational studies.
- Plan, organize, and carry out assignments from management staff with minimal direction.
- Conduct research on a wide variety of administrative topics including grant funding, contract feasibility, budget and staffing proposals, and procurement and operational alternatives.
- Evaluate and develop improvements in operations, procedures, policies, or methods.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.

**SENIOR MANAGEMENT ANALYST
EMPLOYMENT STANDARDS cont.**

- Interpret, apply, explain, and ensure compliance with applicable federal, state, and local policies, procedures, laws, and regulations.
- Effectively represent assigned program and the department in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Establish and maintain a variety of filing, record keeping, and tracking systems.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate and maintain modern office equipment, including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines in politically sensitive situations.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

and

Training and Experience: Any combination of training and experience which would provide the required knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Education: Equivalent to graduation from an accredited four-year college or university with major coursework in accounting, finance, business administration, public administration, or a related field.

Work Background: five (5) years of increasingly responsible experience in providing administrative or analytic support in a public agency preferably a transit agency.

SPECIAL REQUIREMENTS

Possession of an appropriate California driver's license.

November 2013