

**COMMUNITY DEVELOPMENT DEPARTMENT
ENGINEERING DIVISION
FINANCIAL ANALYST TRAINEE**

GENERAL DUTIES: Under the close supervision of the City Engineer, perform entry-level professional analysis and budget preparation work for the Community Development Department. Duties will include assisting with the preparation of the Capital Improvement Budget, providing analytical support for development impact fees and other fees, and assisting the Community Development staff in analyzing historical data and making future financial projections. It is anticipated that the Financial Analyst Trainee will continue their education and expand their experience to become a journey-level Financial Analyst in two to three years. Additional work assignments assisting other departments are anticipated.

GENERAL REQUIREMENTS:

Personal Appearance - Is appropriate for the work environment and meets expectations for the proper image of the City, as per department policy.

Attendance - Follows department/City policy in regards to punctuality and attendance.

Compliance with Work Instructions - Follows all work instructions given, and completes all assigned duties. Follows the policies, rules, and regulations of the City and department.

Safety - Follows the Safety and Health Handbook, as well as other safety related standards, and avoids unnecessary risk to oneself, co-workers, citizens, and property.

Internal Relations - Conducts work in a manner which supports the overall team effort, and which avoids disruption of one's work and the work of others. Treats all City employees with respect. Takes responsibility to resolve differences. Finds solutions to problems. Respects racial, religious, ethnic and sexual differences of others, and avoids derogatory statements regarding these differences.

Customer Service - Conducts work that fosters public support for the City, that will lead to fewer complaints and claims against the City. Treats customers with respect. Follows the same rules that one expects the customers to follow. Respects racial, religious, ethnic and sexual differences of others, and avoids derogatory statements regarding these differences.

ILLUSTRATIVE EXAMPLES OF WORK:

In a learning and training capacity, the Financial Analyst Trainee will:

1. Prepare and track the City's annual Capital Improvement Budget, financial plan and annual development impact fee and rate analysis; work with various departments focusing on requests for information and financial projections.
2. Perform grant writing and preparation of reimbursement requests from local, State and Federal aid programs.

3. Provide cost accounting support in establishment of fees and overhead charges for City services.
4. Analyze problems, evaluate alternatives, and implement creative recommendations.
5. Manage and coordinate special projects.
6. Research past expenditures and project future changes using regression analysis and historical trending.
7. Analyze and reconcile subsidiary, budgetary and general ledger accounts.
8. Organize and conduct studies and projects.
9. Collect, tabulate and evaluate information.
10. Assist in the preparation and follow-up of applications for financial aid from local, State and Federal agencies.
11. Assist with the coordination of programs and development of data on projects or problems involving more than one department.
12. Develop annual budgets, impact fee analysis and rate analysis.
13. Perform other related duties as assigned.

REQUIRED SKILLS, KNOWLEDGE AND ABILITIES:

SKILLS:

1. Communicate effectively, both verbally and in writing.
2. Maintain accurate records and make accurate arithmetic calculations.
3. Work on several assignments simultaneously, set priorities, meet deadlines, and work independently within established guidelines.

KNOWLEDGE: Knowledge of:

1. Fiscal and budgetary practices and public finance.
2. Accounting, auditing, financial forecasting, and budgeting principles and practices.
3. Funding sources; principles of administration, organization and management.

4. Governmental accounting principles, applicable laws and regulations, and financial reporting practices.
5. Statistical and analytical techniques.
6. Basic Management Information Systems applications for accounting and budgeting functions.
7. Spreadsheet software.
8. General customer service principles and practices.

ABILITIES: Ability to:

1. Analyze budgets.
2. Manage multiple priorities.
3. Analyze complex problems, evaluate alternatives and implement creative recommendations.
4. Establish and maintain effective working relationships with Supervisor, co-workers, other departments, outside agencies, and the general public.
5. Use independent judgment, within established guidelines, in the course of undertaking assigned responsibilities.
6. Organize work, set priorities, meet deadlines, and complete assignments with minimal supervision.
7. Communicate effectively, both verbally and in writing.

MACHINES/TOOLS/EQUIPMENT UTILIZED:

Typical office and field environments include the following:

1. Computer, keyboard and monitor
2. Laserjet or ink jet printer
3. Telephone or headset
4. Copier
5. Calculator
6. 10-key adding machine
7. Facsimile machine
8. Optical character reader
9. Typewriter
10. Postage meter and scale

MACHINES/TOOLS/EQUIPMENT UTILIZED:

11. Lettering machine

12. Microfiche reader
13. Binding machine
14. Polaroid or digital camera
15. Paper shredder
16. Paper cutter
17. Plans, maps and blueprints
18. Presentation equipment, microphones, easels, overhead projectors, etc.
19. Plan-copying machine
20. Specialized computer software
21. Automobile

PHYSICAL DEMANDS:

Under typical office or field conditions, employee will perform the following physical activities which include handling files, books, binders, plans, and boxes of work-related material:

1. Sitting, for prolonged periods of time while working at a computer or attending meetings.
2. Walking
3. Standing, during Council meetings or other public presentations.
4. Kneeling
5. Bending/stooping
6. Twisting
7. Reaching
8. Carrying
9. Pushing/pulling, boxes of files or plans.
10. Lifting up to 25 lbs.
11. Driving
12. Speed, in meeting deadlines and in using office equipment.

SENSORY DEMANDS:

Under typical office and field conditions, employee utilizes these senses while using a computer, typewriter, telephone, fax machine, copier, adding machine, postage meter, paper shredder, paper cutter, plan, map, blueprint, camera, microphone, overhead projector, easel, or automobile:

1. Seeing
2. Speaking/Hearing
3. Touching
4. Smelling

ENVIRONMENTAL AND FLOOR SURFACE CONDITIONS:

Office Conditions:

1. Indoors: Typical office conditions, over 90% of the time.
2. Flooring: Low level carpeting, linoleum, tile and wood.
3. Noise Level: Conducive to office settings with phones, copiers, faxes, or typewriters.
4. Lighting: Conducive to normal office setting.
5. Ventilation: Provided by central heating and air conditioning.
6. Dust or Fumes: Normal, indoor levels associated with dust and odors from paper, blueprints, ink pens, plan copier, copy machines, or other office-related equipment.

Field Conditions:

1. Outdoors: Typical field conditions, less than 2% of the time.
2. Travel: Under varying conditions via automobile or plane, less than 8% of the time.
3. Flooring: Asphalt, grass, dirt, wood, carpeting, linoleum, tile, and uneven surfaces.
4. Noise Level: Minimal to low exposure to equipment noise when traveling in the field.
5. Lighting: Normal outdoor conditions, with some exposure to extreme weather conditions.
6. Ventilation: Heating and air conditioning provided by vehicle or plane.
7. Dust or Fumes: Normal to high outdoor levels of dust, pollen, or vehicle exhaust when conducting surveys or research or when traveling.

HAZARDS:

Mechanical or electrical exposure is minimal while properly using standard office equipment such as a telephone, computer, typewriter, printer, copier, adding machine, fax machine, radio, paper shredder, paper cutter, microphone, overhead projector, etc.

When traveling in the field, there is some exposure to mechanical hazards while utilizing a vehicle.

ATMOSPHERIC CONDITIONS:

Minimal exposure to fumes occurs in the field, as well as in a typical office environment. Office exposure to fumes or gases may occur due to the use of copiers, dry erase pens, liquid paper, toner cartridges, ink pens, or other office supplies or equipment.

REQUIRED TRAINING, EXPERIENCE AND QUALIFICATIONS:

1. Associate of Science degree in Accounting or related field or possession of 60 semester units of college coursework with classes in accounting, finance, budgeting, or other related field of study.
2. Must be working toward completion of a Bachelors of Science Degree in Finance, Accounting, Public Administration, or a closely related field of study.
3. Any related work experience, including internships, is preferred.
4. Experience in utilization of current personal computer Excel spreadsheet and Microsoft word-processing applications.

5. Possess and maintain a valid California Driver License and a safe driving record necessary to operate assigned vehicle.
6. Willingness to continue education and training by learning new skills as changes occur. Expand skills by taking additional courses and attending seminars, workshops and individual study.
7. Pass a post-offer medical examination, which includes a drug test.
8. Prefer non-tobacco user.
9. Pass a Department of Justice criminal record check for employment.