



## **JOB DESCRIPTION**

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**TITLE:** Finance Management Analyst  
**STATUS:** Non-Union/FLSA Non-Exempt  
**GRADE:** (15)

### **JOB SUMMARY:**

Responsible for analyzing, designing, developing, implementing, and evaluating financial policy, programs, and procedures; provides assistance to the Finance Director and other department supervisors/managers.

### **REPORTING RELATIONSHIPS:**

Reports to the Finance Director. May lead teams but does not supervise others.

**ESSENTIAL DUTIES** includes the following. Performs all other duties as assigned or required.

- Oversees implementation of special projects and programs by drafting project charters, managing Request for Proposal/Bid processes, and monitoring project budgets and schedules;
- Facilitate regular check-in meetings with department managers and supervisors to manage projects, process improvements, and policy efforts;
- Lead ad-hoc teams of staff and manages projects that relate to financial processes using Lean Six Sigma, Agile, Project Management Professional (PMP) standards, Information Technology Infrastructure Library (ITIL), or other proven approaches;
- Train staff in new policies, procedures, and programs;
- Create and maintain training materials for business processes such as: standard operating procedures (SOP), recorded videos, live training presentations, and manuals;
- Extract raw data from multiple software packages and deliver credible, actionable, responsible, and transportable reports, analysis, and recommendations to management;
- Assists with the preparation of reports, metrics, performance measures and presents information to management, staff, and the Board of Commissioners;
- Manages and oversees contractual services as assigned, e.g., electronic funds processing, communications systems including Interactive Voice Response (IVR), electronic billing and messaging systems;
- Develops scopes of services for contracts, monitors contracts for compliance, reviews invoices and evaluates contractor performance, and makes recommendation to Finance Director as necessary or appropriate;
- Assist the Finance Analyst with preparation of the District's biennial Budget and triennial rates; performs analysis to support budget recommendations;
- Maintain content on Finance web page and Finance Library in Enterprise Content Management (ECM) system;
- Assists with preparation of annual financial statements, financial and accountability audits, and helps prepare documents associated with debt issuance, as needed; and
- May serve on various committees or task forces.

## **MINIMUM QUALIFICATIONS:**

### **Knowledge of:**

- Principles of project management, data analysis and evaluation;
- Skilled in the research, analysis, and interpretation of complex financial and operational data;
- Principles of contract administration and asset management;
- Lean management principles or continuous improvement techniques;
- Computerized financial management systems;
- Current MS Office tools and Windows desktop operating systems; and
- Operating office equipment and tools such as phones, fax machine, copiers, computers, software and databases.

### **Skill in:**

- Using computers, applicable software, and database programs;
- Establishing and maintaining effective interpersonal relationships with all organizational levels, District customers, and the public;
- Leading projects independently and acting in a lead role on projects;
- Creating and maintaining computerized systems;
- Performing analytical work of a highly responsible nature;
- Gathering, assembling, and analyzing data;
- Preparing clear and concise analytical reports;
- Effectively presenting program/project issues to a variety of audiences;
- Working independently, and as a member of a team, and making appropriate decisions regarding work methods and priorities; and
- Communication, both written and oral, and interpersonal skills as applied to interaction with coworkers, supervisor, and the general public sufficient to exchange or convey information and to receive work direction.

### **Experience/Education:**

Any equivalent combination of education and experience that provides the applicant with the knowledge, skills and abilities required to perform the job. A typical way to obtain the knowledge and skills would be two years of progressively responsible analytical or administrative experience and a bachelor's degree in Accounting, Finance, Economics, Business, Public Administration.

A Master's degree in Public Administration (MPA) or Business Administration (MBA) and 6-month internship in process improvement or modeling can be substituted for experience.

### **WORKING CONDITIONS:**

Duties are typically performed in an office environment.

### **PHYSICAL REQUIREMENTS:**

This position performs work in a standard office environment. Ability to operate a computer, telephone and other standard office equipment, and to communicate with employees, vendors and external ratepayers is required. The ability to travel within an office environment regularly and between office locations on an occasional basis is required. Occasional travel to meetings or conferences is required.

*This job description does not constitute an employment agreement and may be changed or amended at any time to meet the needs of the District.*

Proposed: February 7, 2013  
Updated: December 21, 2018  
Revised: June 21, 2019  
Revised: November 23, 2021