

FINANCIAL ANALYST, 1549

Summary of Duties: Analyzes proposals for contracts, leases and franchises; advises management on the financial aspects of construction and other projects, agreements, or franchises; and does related work.

Distinguishing Features: A Financial Analyst is responsible for making recommendations to department management on the financial capability of companies, vendors, licensees, and contractors to perform in accordance with proposed specifications and agreements. An employee of this class receives assignments in terms of broad objectives with work being reviewed mainly in terms of objectives accomplished.

Examples of Duties: Analyzes proposals for contracts, leases, and major projects including renewals, transfers, and new and replacement franchises or agreements for the purpose of determining financial aspects of proposals; reviews financial documents, such as confidential bank agreements, transfers of ownership, and modification of existing ownership to determine financial viability of proposals; analyzes economic structure, financial practices and trends, and performance statistics of companies; makes recommendations to department management on the financial capability of lessees, vendors, licensees, consultants, and service providers to perform according to their proposed agreement, license, franchise or contract specifications;

Reviews the financial viability and economic benefit of long-term modernization projects; conducts statistical research by reviewing appropriate documents to ensure nondiscriminatory and non-preferential treatment by companies with regard to rates and charges; assists in the collection, recording and analyses of field audits and investigations regarding billing complaints; evaluates equipment acquisition and operational changes and determines cost and financial results of proposed rate changes.

Reviews existing and prospective City, State and Federal legislation relating to financial matters affecting major projects and programs; represents the Department before the City Council, its Committees, Commissioners, and any other public and private agencies, as directed; prepares statistical and narrative reports with recommendations; and may occasionally be assigned other duties for training purposes or to meet technological changes or emergencies.

Qualifications: A good knowledge of the principles, methods, and techniques of financial analysis; a good knowledge of the principles of economics and the methods of economic analysis; the ability to analyze and interpret economic factors affecting contracts, major

economic programs, leases and construction projects; the ability to analyze, interpret, and assemble data and to make sound recommendations; the ability to perform independent research; the ability to prepare statistical reports; the ability to prepare oral and written reports and recommendations concisely, logically and convincingly; and the ability to deal tactfully and effectively with City employees, public officials, and representatives from the industry.

Graduation from a recognized four-year college or university with a major in finance, economics, or business administration and two years of professional experience in financial analysis, investment analysis, or economic analysis is required. A master's degree in finance, economics, or business administration may be substituted for one year of the required experience.

License: A valid California driver's license may be required.

Physical Requirements: Strength to perform average lifting up to five pounds and occasionally over fifteen pounds; good speaking and hearing ability; and good eyesight.

Persons with medical limitations may, with reasonable accommodations, be capable of performing the duties of some of the positions in this class. Such determination must be made on an individual basis in light of the person's limitations, the requirements of the position, and the appointing authority's ability to effect reasonable accommodations to the person's limitations.

As provided in Civil Service Commission 2.5 and Section 4.55 of the Administrative Code, this specification is descriptive, explanatory and not restrictive. It is not intended to declare what all of the duties and responsibilities of any position shall be.