

**ADMINISTRATIVE ANALYST
(Class Code 1590)**

TASK LIST

A. General Administration

1. Writes narrative material such as letters, memos, and reports on various personnel, budgetary, contractual, grant, and policy issues using word processing software, including Microsoft Word and Google Docs, in order to provide information to Office management, management of other City Departments, the Mayor, and/or City Council.
2. Attends meetings with Office management, staff of other City Departments, and staff of elected officials in order to obtain and/or provide information about the budget process, and/or hear various proposals and projects included in the proposed budget of a City Department or other issues related to City operations.
3. Serves as a member of a committee and/or facilitates other working groups for purposes such as evaluating proposals or bids, writing reports or narratives, or drafting proposed rules, regulations or policies in order to complete work with input from several points of view and agree on final products with other members.
4. Presents information in narrative, graphical, or tabular form to the City Council, Council Committees, General Managers and/or others using materials or software such as handouts and Microsoft PowerPoint in order to gain support of proposed projects and/or explain the need for and function of proposed projects.
5. Reads, reviews, and researches current, proposed, or amended City policies, such as homeless initiatives or home-sharing, and determines the impact on City authority, operations, and/or finances in order to recommend a City position to either support, oppose, or amend the policy.
6. Schedules regular and special meetings with staff in various departments or other stakeholders in order to discuss a specific topic pertinent to the departments and/or ensure compliance with Brown Act requirements for City meetings.

B. Budget

7. Reviews annual budget requests from City Departments to ensure that they are in compliance with the Mayor's budget policies, in the correct form, that the calculations and other details are accurate, and that the language is clear and correct, including use of standard and/or specialized terms.

8. Reviews and analyzes programmatic operations data from current and prior years such as work programs, metrics such as miles of street paved, number of complaints resolved, or number of permits issued; statistics; staffing levels; and equipment needs by using software such as financial applications in order to determine obligatory changes and/or changes in the workload which will be needed to continue current service levels and/or comply with City policies.
9. Evaluates budget requests using information from prior knowledge of Department operations and knowledge of current issues and priorities in the City and Department in order to ensure a thorough review of major budget changes and compliance with current City policies and/or priorities.
10. Analyzes supporting data submitted with budget requests by means such as going to sources for additional data, evaluating raw data, and/or getting additional opinions when supporting data includes estimates or projections which cannot be verified directly in order to determine if budget items are justified.
11. Consults with management staff of City Departments via face-to-face meetings, phone, email, and/or other technologies in order to verify needs for requested personnel, equipment, and/or expenses, obtain additional information, and/or clarify ambiguities or inconsistencies in Department budget requests.
12. Visits work areas to make personal observations of department operations such as effectiveness of present staff in meeting current workloads, condition and/or adequacy of equipment, and efficiency in use of other resources in order to gather more information, evaluate operations, and/or verify needs.
13. Compares benefits and costs of proposed service enhancements such as expected benefits of new programs or projects, requests for additional personnel, and requests for conversion to new equipment in order to make a sound recommendation as it relates to budget requests and determine incremental costs to the City.
14. Enters financial data such as need for additional personnel, resources required for new programs, salary steps, pay increases, or expected cost of turnover into budgetary and financial applications such as Performance Budgeting in order to allocate budget recommendations by categories such as budget item, account program, and element.
15. Formulates recommendations (which may differ from Department requests) on budget requests to the City Administrative Officer, based on factors such as cost, value, and/or Mayor's budget priorities, in order to make adjustments required to bring requests into compliance with the entire City budget policy.

16. Writes preliminary budget documents such as detail of department programs (“blue book”), itemized lists of expense accounts, details of non-departmental appropriations, budgetary schedules, and list of items for discussion in order to make budget recommendations to the City Administrative Officer and Mayor’s Office.
17. Meets with the City Administrative Officer and other Department personnel to present and justify budget recommendations for assigned Departments and answer questions in order to receive instructions about any revisions to be made before presenting the recommendations to the Mayor’s Office and the Department.
18. Discusses the City Administrative Officer’s budget recommendations with the Mayor’s Office and Department management in order to inform them of differences between their budget requests and the City Administrative Officer’s recommendations, answer questions, and hear concerns about specific items or requests for additional revisions based on Department priorities.
19. Presents Department budget information before City Council Committees and the City Council verbally and/or using supplementary materials such as handouts, charts, or graphs in order to communicate information and its effect on overall City budget clearly and concisely for the City Council Committees or City Council to make informed decisions.
20. Adds, deletes, or revises items in a Department’s preliminary budget such as personnel changes, expense, or equipment purchases using software such as Performance Budgeting in order to reflect changes initiated by the Mayor, Budget and Finance Committee, or City Council.
21. Develops visual representations of budgetary information such as charts and tables using software and programs such as Microsoft Excel, in order to provide support and explain items within the proposed Department budget in anticipation of questions.
22. Collects, compiles, and proofreads budget documents such as the “blue book” and the final budget in order to assist and/or coordinate preparation of the proposed budget for printing for public dissemination.

C. Budget Administration

23. Examines materials such as data from Department records, financial reports, and other sources of information in order to monitor status of revenue and expenditures and have information available when matters such as transfers between budgeted accounts or requests for interim funding are under consideration.

24. Investigates requests for various personnel authority changes, including substitute and in-lieu authorities, by reviewing current vacancies, workload requirements, fund availability, impact on department personnel management, employee relations, and conformance with Civil Service requirements in order to recommend approval or disapproval of the request.
25. Investigates need for special funding, additional funding, or changes in the approved budget by reviewing past expenditures or projecting/forecasting future expenditures in order to determine the amount of funds to be transferred or other changes in the approved budget and/or authorize interim appropriations to meet an unexpected need.
26. Writes recommendations and approves departmental requests to fill positions, transfer funds, purchase equipment, or make temporary personnel adjustments in order to ensure compliance with adopted budget and expenditure plans and reflect changing operating department conditions.
27. Writes comprehensive written reports which include analysis of Citywide or Department issues and current procedures, descriptions of Department proposals, backgrounds and history, and discussion of alternative solutions to problems and recommendations in order to present clear and concise descriptions of current issues and proposed solutions.
28. Compares Department budget plans with actual budget revenues and expenses and activities by reviewing documents, holding discussions with Department representatives, and examining information from other relevant sources such as records of services to other Departments or records of costs of emergency repairs to City property because of natural disasters and other unusual occurrences in order to ensure compliance with City policies and legal requirements.
29. Reads and analyzes revenue documents such as the Office of the City Controller's Statement of Receipts and Departmental fee and revenue reports in order to monitor effectiveness of fees to recover costs and determine projected revenues.
30. Reads or reviews requests from non-Council controlled Departments, such as Airports, Harbor, and Water and Power regarding contracts, leases, and capital projects in order to report on and make recommendations regarding requests which require Mayor and Council approval.

D. Audits

31. Collects data on topics such as wage and cost trends, nonproductive or absent time, employee turnover, and overtime by utilizing PaySR, Merlin, or Financial Management System (FMS) or reviewing/verifying information provided by the departments in order to have data available for reference when needed for reports.

32. Analyzes data on topics such as wage and cost trends, nonproductive or absent time, employee turnover, and overtime using tools such as flow charts, statistical sampling, checklists, and spreadsheet programs in order to provide information to Department management, identify alternative solutions to problems, or make recommendations about salaries for various types of work and/or budget requests.
33. Gathers Department operations information by reviewing City Administrative Officer's reports and interviewing knowledgeable CAO staff and division level managers in Departments in order to determine current issues and/or problems.
34. Identifies specific problems and/or issues such as security staffing, maintenance frequency for City facilities, personnel use, and record keeping efficiency by reviewing expenditures and comparing them with historical levels in order to recommend changes, provide alternatives for improvement, or improve use of resources.
35. Collects information relevant to problems from sources such as field observations, interviews with supervisors, employees, CAO staff, and other knowledgeable persons, and published descriptions of successful solutions previously developed by other agencies in order to formulate suggestions for solutions to problems.
36. Meets with Department management to discuss Department operations issues such as poor accounting procedures, revenue loss, or inadequate supervision of personnel in order to reach agreement on nature of Department problems and/or need for change.
37. Discusses alternative solutions to problems with staff such as the supervisor or Department personnel, considering factors such as staffing levels or levels of experience, in order to evaluate them, determine the need for additional research and/or analysis, and/or make recommendations.
38. Formulates recommendations for Departmental changes such as reorganization or changes in work methods or procedures based on research analyses in order to increase efficiency and/or reduce costs.

E. Contract Analysis and Administration

39. Develops, reviews, or analyzes Requests for Proposals (RFPs), either individually or as a committee member, including establishing the purpose, scope of work, rating criteria for proposals, and appropriate selection processes, and hosting the bidders' conference in order to secure and award bids on necessary work in compliance with legal requirements, policies, procedures and funding requirements.

40. Writes reports on proposed contracts covering work tasks, products, services, payment and delivery schedules, and contractor qualifications, and reviews contractor compliance documents in order to ensure compliance with the contract's stated purpose, City policies and procedures, funding, and legal requirements.
41. Reads and analyzes bids and proposals submitted in response to RFPs either individually or as a committee member, such as proposals to select bond counsel, trustees and underwriters, housing administration contractors, auditors, and technology applications in order to recommend awarding a contract.
42. Assigns scores to bids or proposals using established criteria and individual judgment and discusses scores with other bid selection team members in order to recommend contractor selection and reach consensus on recommendations for selection.
43. Administers contracts by performing activities such as monitoring submission of timely draft reports, development of successful performance tests, or completion of services/scope of work in order to determine contract compliance and recommend approval of contract payment.

F. Capital Projects

44. Reads and reviews Department requests for building, replacement, or modification of municipal facilities or physical plant infrastructure such as animal shelters, public safety facilities, public works yards, traffic lights, storm drains, sewer facilities, and streets in order to evaluate the need and immediacy of the project.
45. Visits sites of proposed capital projects with personnel from requesting Department and representatives from other Departments which may be involved such as the Department of Public Works: Bureau of Engineering or the Department of Building and Safety in order to evaluate operational needs, seismic considerations, and planning or design of the proposed project.
46. Evaluates potential alternatives to construction or development of property such as leasing space, consolidation or expansion of existing facilities taking into consideration factors such as cost of project, site availability, operational needs, and time frames in order to set priorities for requests from different Departments.
47. Determines eligibility of each project for monies from sources such as debt financing grants, general and specialized funds using federal, state, or local guidelines, records of funding for similar projects, and personal knowledge.
48. Investigates alternative project fund sources when City funds are not available, such as ballot measures for special taxes, general obligation bonds, assessment districts, revenue bonds, and other methods not requiring voter approval such as imposing service fees in order to fund specific City projects or capital programs.

49. Gathers information from documents required for issuing general obligation and revenue bonds such as projected expenditures and project descriptions to attorneys and consultants preparing bond documents in order to provide the information to the appropriate personnel.
50. Discusses proposed projects with or makes recommendations on project need and funding sources to the Mayor and Council District representatives, other governmental jurisdictions, and involved City personnel in order to determine City priorities, technical requirements, and related projects in other jurisdictions and obtain approval for projects.
51. Reads or reviews information obtained from sources such as the state and federal governments and other City Departments in order to estimate availability of assessments, fees, and special funds for projects.

G. Communication

52. Discusses work and other work-related information, such as requirements of City procedures, laws, ordinances, and regulations with supervisors, other City staff, and other interested parties orally or in writing in order to identify problems and possible solutions, obtain information, and explain applicable procedures and regulations.
53. Reviews and interprets material such as supervisors' instructions, reports or problems, financial documents, technical material related to budget preparation, employment statistics, funding of capital projects, and/or revenue collection, or letters and memos in order to apply the information to specific situations.