

# MONTEREY COUNTY

## PRINCIPAL ADMINISTRATIVE ANALYST SENIOR ADMINISTRATIVE ANALYST

### SCOPE

This specification describes the two highest-level classes in the Administrative Analyst series.

### DEFINITION

Under general direction of the County Administrative Office's Budget and Analysis Division, Principal and Senior Administrative Analysts perform significant analytical and consultative duties to assigned County departments in order to carry out budget and fiscal policy management functions, i.e. analysis and development of recommendations regarding their policies, budget, staffing patterns, organization and physical plant needs.

### DISTINGUISHING CHARACTERISTICS

Positions in the Administrative Analyst class series are assigned to the County Administrative Office. The classes described in this job specification are the advanced working level classes in the class series. The major distinction between these two classes is the type of supervision received, however each class works with minimal supervision. The Principal Administrative Analyst receives broad policy guidance and presents formal and complete recommendations in final form, while the Senior Administrative Analyst presents preliminary recommendations for review by superiors prior to preparation of final reports. Both classes generally have assigned departments in, or have responsibility for, an entire functional area such as health and welfare, justice systems, or county budget.

The class of Principal Administrative Analyst is distinguished from the next higher class of Chief Analyst in that the latter is responsible for the overall control and responsibility for the Budget and Analysis Division under policy direction from the Assistant County Administrative Officer.

The class of Senior Administrative Analyst is distinguished from the next lower class of Associate Administrative Analyst in that the latter is assigned projects of limited scope, which contribute to major projects and policy recommendations being developed by higher-level analysts in the Administrative Analyst series.

### EXAMPLES OF DUTIES

1. Participates in the development of the annual County budget by making recommendations on revenue sources and expenditure levels; analyzes and evaluates agency/department budget requests and other proposals for immediate and long-term policy and fiscal impact; and prepares expenditure and revenue recommendations for assigned agency/departments. Utilizes budget preparation technology to generate accurate data in the budget document.
2. Performs analysis in order to identify areas where change is needed, and develops and prepares written and oral reports including recommendations, pertaining to departmental and interdepartmental operations such as policies, effectiveness of operational functions, resource allocation, organizational structure, program evaluation, work load, physical requirements, and other matters of concern for presentation to the County Administrative Office executive management, agency/department management, and Board of Supervisors.
3. Represents the County Administrative Office while working with all central service departments' management staff, e.g. General Services, County Counsel, Information Technology Services, Auditor-Controller, Treasurer-Tax Collector, on issues related to specific agency/department initiatives and/or Countywide policy goals.

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4. Prepares short-term and long-term financial forecasts, and develops recommendations for contingency plans to address changes in revenue and expenditure requirements.
5. Recommends guidelines for the development of spending plans, including both one-time and ongoing resources for programs, capital expenses, technology improvements, and reserves.
6. Monitors expenditures and revenues, researches and reports on unusual occurrences, evaluates and provides recommendations on mid-year adjustments, for assigned agency/departments.
7. May be assigned continuing responsibility for the maintenance of budget development software and budget production process.
8. Reviews agency/department transmittals, i.e. grant requests, to the Board of Supervisors for accuracy, completeness, and fiscal/policy implications, and provides recommendations to County Administrative Office Executive Management regarding agenda placement.
9. Maintains communication with, and assists departments in order to keep informed of departmental operations, to assist in resolving problems and to develop recommendations on matters related to departmental operations, by providing a variety of information and coordinating the activities of one department with those of others.
10. May act as staff support to Board policy committees; works with Board of Supervisors staff to prepare and maintain committee work plans; plans committee agendas; tracks committee referrals and requests for information.
11. Analyzes and maintains current knowledge of laws, rules, regulations and proposed legislation related to assigned County departments and functions; prepares comprehensive written and oral reports regarding fiscal, policy, and/or programmatic impact; provides recommendations concerning the modification of programs and procedures to assure compliance with local, State and Federal requirements as appropriate; develops County position papers.
12. Keeps informed on Federal and State grant programs; and coordinates the preparation of application for grants; may coordinate and review all requests for Federal and State funds.
13. Represents the County at intra-county, inter-agency, and community meetings.
14. May assist in selection, training, coordination, assignment, supervision, and evaluation of work performed by other analysts and support staff.

**QUALIFICATIONS**

A combination of experience, education, and/or training which substantially demonstrates the following knowledge, skills and abilities:

**Principal Administrative Analyst:**

**Thorough knowledge of:**

1. Principals, practices, and techniques of budget, fiscal and financial management, and forecasting, i.e. budget development, preparation, processes [performance-based, zero-based and incremental budgeting], and recommendations, necessary to develop spending plans and evaluate funding sources.

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2. The functions and organization of local government, structure and operations of County departments; and interrelationships between local, county, State and Federal government levels.
3. The programs and mandates in a major functional area of County government, e.g. law enforcement, health and welfare, public works, etc.
4. Principles, practices, and current trends of business or public administration, i.e. management analysis/theory, and organizational design/theory, in order to formulate administrative policies, procedures and recommendations.
5. Federal and State funds and sources available for local purposes, methods of securing grants and cooperative efforts that can be entered into on the local level.
6. Principles, practices, and techniques to collect, interpret, analyze and evaluate complex narrative and statistical data pertaining to fiscal and management matters, i.e. cost-benefit analysis, productivity analysis, comparative analysis, and sampling techniques; policy development, report writing, and basic statistics and application thereof.
7. Principles and practices of project management, including organization, coordination, scheduling, and oversight of project progress.
8. Principles and practices of personnel management and supervision, i.e. plan, direct, coordinate, prioritize and delegate the work of others, and provide training.
9. The principles and practices of contract administration.
10. Computer applications, i.e. word processing, spreadsheet design and analysis, presentation software; other specialized budget preparation software, and Internet search engines.
11. Local, State and Federal policies, rules, regulations, laws, and current/pending legislation applicable to assigned areas of responsibility, and which may impact County government.

Working knowledge of:

1. Group dynamics as they relate to public organization operations.
2. Governmental accounting procedures.

**Senior Administrative Analyst:**

Thorough knowledge of:

1. Principles, practices, and techniques of budget, fiscal and financial management, and forecasting, i.e. budget development, preparation, processes [performance-based, zero-based and incremental budgeting], and recommendations, necessary to develop spending plans and evaluate funding sources.
2. Principles, practices, and current trends of business or public administration, i.e. management analysis/theory, and organizational design/theory, in order to formulate administrative policies, procedures and recommendations.
3. Principles, practices, and techniques to collect, interpret, analyze and evaluate complex narrative and statistical data pertaining to fiscal and management matters, i.e. cost-benefit analysis, productivity

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analysis, comparative analysis, and sampling techniques; policy development, report writing, and basic statistics and application thereof.

4. Principles and practices of project management, including organization, coordination, and scheduling of project progress.

Working knowledge of:

1. The functions and organization of local government, structure and operations of County departments; and interrelationships between local, county, State and Federal government levels.
2. The programs and mandates in a major functional area of County government, e.g. law enforcement, health and welfare, public works, etc.
3. Federal and State funds and sources available for local purposes, methods of securing grants and cooperative efforts that can be entered into on the local level.
4. Principles and practices of personnel management and supervision, i.e. plan, direct, coordinate, prioritize and delegate the work of others, and provide training.
5. The principles and practices of contract administration.
6. Local, State and Federal policies, rules, regulations, laws, and current/pending legislation applicable to assigned areas of responsibility, and which may impact County government.
7. Computer applications, i.e. word processing, spreadsheet design and analysis, presentation software; other specialized budget preparation software, and Internet search engines.

Some knowledge of:

1. Group dynamics as they relate to public organization operations.
2. Governmental accounting procedures.

**Principal Administrative Analyst and Senior Administrative Analyst:**

Ability to:

1. Collect, interpret, analyze, and evaluate complex narrative and statistical data pertaining to fiscal and management matters in order to develop spending plans and evaluate funding sources, and to translate findings into coherent, well written reports with effective recommendations.
2. Read, understand, analyze, interpret, and explain complex issues, legislation, laws, rules, and regulations related to assigned areas of responsibility, and develop effective recommendations in the areas of budget, organizational structure, administrative procedure, and public policy.
3. Exercise objectivity, and independent and sound judgment and initiative; function effectively with minimal supervision. Manage complex multiple and changing priorities. Produce accurate information in short timeframes as directed.
4. Communicate effectively, both oral and written, in order to prepare, explain and/or provide presentation of comprehensive administrative, technical and statistical reports, findings, recommendations, and policies before CAO executive management, the Board of Supervisors, County agency/department

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management, other governmental agency representatives, and the public; and in order to promote and gain concurrence, consensus and cooperation through discussion and persuasion.

5. Be patient, flexible, reliable, and dependable.
6. Work closely with County staff at all levels to anticipate, obtain, and provide ongoing and accurate fiscal, administrative, and operational information.
7. Dependent upon level of classification, may provide and/or facilitate staff supervision and training, i.e. plan, direct, coordinate, prioritize, and delegate the work of others.
8. Dependent upon level of classification, develop and implement, or assist in the development/implementation, of policy guidelines and accomplish intended results.
9. Establish and maintain effective working relationships through discussion and persuasion with all levels of County employees, public/elected officials, representatives of other agencies, and members of the public. Provide excellent and courteous customer service.
10. Attend or serve as management liaison at meetings, training events, or functions such as committees, task forces, associations, and conferences; represent the department with tact, diplomacy, and professionalism.
11. Use personal computers and standard professional office software, i.e. word-processing, spreadsheet, database and presentation software, and other specialized budget preparation software.

**REQUIRED CONDITIONS OF EMPLOYMENT**

As a condition of employment, the incumbent will be required to:

1. Possess a valid California Class C Driver's License or the employee must be able to provide suitable transportation, which is approved by the appointing authority.
2. Be willing and available to work an irregular schedule, i.e. work overtime on short notice, or on weekends during budget preparation cycle.

**EXAMPLES OF EXPERIENCE/EDUCATION/TRAINING**

The knowledge, skills and abilities listed above may be acquired through various types of experience, education or training, typically:

**Education:**

College coursework equivalent to a Bachelor's degree in Public or Business Administration or a closely related field,

**AND**

**Experience:**

**Principal Administrative Analyst:**

Four (4) years of experience performing budget, policy, and program analysis duties similar to those of the classification of Senior Administrative Analyst in Monterey County, at least three (3) years of which must have been in a government agency, with an emphasis in budget and financial management.

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**Senior Administrative Analyst:**

Three (3) years of experience performing budget, policy, and program analysis duties similar to those of the classification of Associate Administrative Analyst in Monterey County, at least two years of which must have been in a government agency, with an emphasis in budget and financial management.

**PHYSICAL AND SENSORY REQUIREMENTS**

The physical and sensory abilities required for this classification include:

1. Ability to function with multiple, critical, emergency, and/or changing priorities.
2. Ability to sit for long periods of time performing normal duties working at a personal computer, or while attending meetings.
3. Ability to see well enough to read standard text and documents and data on computer screen
4. Ability to communicate verbally to County department employees, officials, and members of the public.
5. Ability to hear oral communications, both in person and on the telephone.
6. Use finger and manual dexterity in order to operate a computer keyboard.

**CLASS HISTORY**

Class Code: 14A23 [Principal AA]  
14A22 [Senior AA]  
Established Date:  
Revised Date: July 1987  
May 2005  
Former Title: (New)

**CLASS DATA**

Job Group: 03  
EEO Category: P  
Bargaining/Employee Unit: X  
Work Comp. Code: 8810  
FLSA: E  
MOCO OT: N

Prepared by:

Ruby Urueta

Approved by:

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County Administrative Office

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Date

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