

## MANAGEMENT ANALYST

### CLASSIFICATION DEFINITION

The Management Analyst class is responsible for providing first level supervision and management over programs and/or staff engaged in general administrative, personnel, staff development, fiscal, and/or program analysis. This class may supervise employees that perform professional journey-level work and personally handle the most difficult and sensitive work. A Management Analyst may direct staff over more than one function such as fiscal analysis, personnel, staff development, and program analysis; however, in a larger department the class may have responsibility over only one of the functions due to the size and complexity of that function.

The Management Analyst is distinguished from the Senior Management Analyst in that the latter is a second-level supervisor/manager over a staff and is responsible for all or a large portion of staff services.

The Management Analyst is distinguished from the next lower class of Administrative Analyst in that the former functions at a high level of autonomy, and is expected to take a great degree of initiative while providing a greater breadth and scope of analysis across divisions and programs. The Management Analyst may supervise and manage staff. Examples of type of work performed by the Management Analyst could include broad trend analysis with County wide impacts; department/ County wide special projects; managing or otherwise interacting with State or Federal programs and/or staff; reporting directly to the Department Head or in the case of the County Administrator or Deputy County Administrator.

If a position is allocated to this class based upon assignment to a specialized area or option, then separate minimum qualification and recruitments are permitted which allow for separate lists for each option that meets the specific needs of the assignment. The allowable options are: General, Personnel, Staff Development, Fiscal, Program Analysis or County budget analysis. The class specifically assigned to the following Departments: County Administration, Auditor/Controller, Health and Human Services and Public Works.

### TYPICAL DUTIES

Duties may include, but are not limited to, the following:

#### **For All Options:**

- Plans, organizes, manages, and/or oversees a group of programs and/or employees.
- Establishes performance standards and provides feedback to employees.
- Supervise staff or directly engage in professional analytical and technical work in the formulation and administration of department or division budgets, development and management of grants and contracts, management of department level procurement, and/or coordination of personnel functions.

- Oversees the collection and analysis of data and makes recommendations on the formulation of policy and procedures, and staffing and organizational changes; conducts surveys and performs research and statistical analysis on administrative, fiscal, personnel, and/or programmatic problems.
- Responds to requests for information from within the County as well as from federal, state, and local agencies; researches, analyzes, and presents information as requested.
- Monitors, researches, reviews, and analyzes existing and new legislation and examines its affect on the County's operations; makes recommendations and provides alternatives to the County, departments, or special project teams consistent with legislative guidelines and requirements.
- Attends and participates in various board, commission and committee meetings as assigned and as a liaison from the department.
- Prepares agreements, contracts, financial spreadsheets, correspondence, reports, charts, graphs and presentations; responds to questionnaires and surveys; establishes and maintains documentation and records as appropriate.
- Facilitates the development and implementation of countywide programs and projects at the department/division level; coordinates meetings and project activities; assists departments/divisions in identifying goals, objectives, activities and outcomes.
- Conducts analyses and policy review as requested by the department; identifies opportunities for improvement and makes recommendations.
- Represent the department at designated meetings, workshops, and/or task forces as necessary.
- Maintains awareness of and participation in external professional environment and resources to ensure the highest level of professional standards is applied to service delivery within the department.
- Participates in special projects; may act as lead in a team project.
- Builds and maintains positive working relationships with co-workers, County management and staff, special interest groups, and the general public utilizing principles of effective customer service.
- Participates in and supervises the design, implementation, and installation of new and revised programs, systems, software, procedures, methods of operation, and forms.
- Directs, supervises and manages one of more of the administrative functions of the department including the compilation of materials and the preparation of budgets, reports, manuals, and publications.
- Pertinent local, state and federal laws, rules, regulations and statutes.
- Ensures effective coordination of departmental activities with other departments, divisions, units and outside agencies; represents the department head in committee meetings; responds to the more sensitive and difficult complaints and requests for information.
- Performs related duties as assigned.

**For Personnel Option** (in addition to the general duties):

- Oversees and directs recruitments and examinations, including outreach activities, for equal employment opportunity recruiting.
- Provides direction and technical guidance on classification and pay studies, including job audits, salary surveys, class specification revisions, and/or new class development.
- Participate in labor relations activities including handling grievances and serving as a team member during negotiations.

**For Staff Development Option** (in addition to the general duties):

- Determines training and development needs.

- Oversees staff engaged in the development and/or coordination of resources for training and staff development including workshops, college coursework, training programs, and on-the-job training sessions.
- Directs staff in conducting workshops and training sessions on a variety of topics including but not limited to technical skills, supervisory principles, customer service skills, safety, diversity, and sexual harassment training modules.

**For Fiscal Option** (in addition to the general duties):

- Oversees and directs staff in performing various fiscal analyses, preparation of recommendations relating to the status of various fund balance projections, fiscal transactions, and related financial activities; analyzes findings and prepares recommendations for department management.
- Oversees the development of the budget or a portion of the budget including the proper expenditure coding, document preparation, and other financial-related activities; monitors budget for various units and projects.
- Monitors and reconciles grants and contracts.

**For Program Analysis Option** (in addition to the general duties):

- Plans, directs, and supervises staff in identifying and analyzing program administration problems and develops solutions.
- Reviews regulatory materials for program impact and possible review and revision of current systems and procedures.
- Coordinates multi-disciplinary groups for program systems review.

**For CAO County Budget Analysis Option** (in addition to the general duties):

- Reviews the County budget as a representative of the CAO and as a resource to the departments; analyzes budget requests, confers with department staff and reviews budget request justifications in relation to the County's total budget, goals, objectives and strategies.
- Participates in monitoring assigned department's/division's adherence to approved budget; reviews financial reports and accounting documents periodically for accuracy; identifies any needs for adjustments or modifications to the approved budget; makes recommendations, provides support and research alternatives.
- Assists in organizational reviews within the County; provides support and advice regarding strategic planning, identification of staffing needs and growth estimates to ensure consistency with County goals and priorities; identifies alternative solutions, prepares recommendations and assists in implementing recommended and/or mandated changes.
- Conducts a variety of administrative, productivity and efficiency studies related to budget process, performance audits, management reviews, and administrative analyses of operational systems and procedures.

**EMPLOYMENT STANDARDS**

Note: The level and scope of the knowledge and abilities listed below are related to job duties as distinguished between the two levels in the Definition section.

**For All Options:**

**Knowledge of:**

- Principles and practices of public and business administration.
- Principles of personnel, budget and program management.
- Governmental functions and organization.
- Principles and practices of supervision.
- Departmental program goals, requirements, and operations.

**Ability to:**

- Analyze data and present ideas and information effectively.
- Identify problems and central issues and develop workable solutions.
- Consult with and advise managers and supervisors on a wide variety of matters.
- Recommend and implement changes, and improvements.
- Analyze problems, select alternatives, project consequences of proposed actions, and implement recommendations in support of departmental objectives.
- Plan, organize, assign, and review the work of staff.
- Select, train, supervise, evaluate, and discipline subordinate staff. Understand, interpret, and apply laws, rules, and regulations as they relate to various areas of responsibility.
- Speak and write effectively using proper English.
- Establish and maintain effective working relationships.

*For Personnel Option (in addition to general KAs):*

**Knowledge of:**

- Principles of public sector personnel administration.
- Principles and methods of position classification, examination administration and development, job analysis, and organization in the public sector, accepted practices to determine job content, evaluate complexity and difficulty of job duties, and identify required skills, knowledge and abilities.
- Statistical methods used in selection and other personnel programs.

**Ability to:**

- Interpret and apply equal opportunity laws, civil service regulations, and provisions of contracts, ordinances, and negotiated agreements and other regulations or policies relating to personnel.

*For Staff Development Option (In addition to general KA s):*

**Knowledge of:**

- Principles and practices of employee training and development.
- Adult learning processes.
- Variety of training programs for employee development.
- Effective communication, facilitation methods, and aids used for training programs and presentations.

**Ability to:**

- Plan, coordinate, and implement training programs.
- Speak effectively and convey ideas clearly while facilitating group discussions and training sessions.

*For Fiscal Option (in additions to general KA s):*

**Knowledge of:**

- Budget preparation and control, accounting principles, and elementary statistical methods.
- Methods and procedures of governmental budget preparation and control.
- Financial statement preparation.

**Ability to:**

- Perform budget analysis, preparation, and monitoring.
- Analyze and make effective recommendations regarding financial and accounting procedures.

***For Program Analysis Option (in addition to general KA s):*****Knowledge of:**

- Principles, methods and techniques of community organization and development, program planning and design, grant writing, budget development, and program evaluation.
- Theories, principles, goals, and objectives of public social services.
- Laws, rules, and regulations governing assigned program areas.

**Ability to:**

- Apply program-specific planning principles and techniques to problems and issues
- Build coalitions among groups with differing needs and objectives.
- Plan and evaluate specific programs.

***For CAO County Budget Option (in addition to general KA s):*****Knowledge of:**

- Principles and practices of public administration and principles of organization, management and staffing.
- Designated computer software, including word processing, spreadsheet, presentation and database applications.
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- Basic principles and practices of public finance, budgeting and fiscal control, budget preparation, accounting principles, and elementary statistical methods.
- Basic principles and techniques of administrative analysis, including workload measurement, workflow and layout, work simplification and systems and procedure analysis.

**Ability to:**

- Independently apply the principles and practices of public administration as assigned.
- Independently analyze systems and administrative and management practices and identify opportunities for improvement.
- Independently read, analyze, evaluate and summarize written materials and statistical data.
- Independently analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.
- Independently prepare technical written materials and apply statistical formulae.

**Minimum Qualifications (Education and/or Experience)****-Either-**

1. Two (2) years of experience in a county system performing duties comparable to the Administrative Analyst class.

**-Or-**

2. Depending upon the position recruited for: Three (3) years of experience performing a broad range of professional, analytical and/or administrative duties in the areas of general administration, personnel, fiscal, staff development, or program analysis work. Supervisory experience is desirable.

**-And-**

A Bachelor's Degree from an accredited college or university.

Note: Additional years of the required experience can substitute for up to two years of the required education on a year-for-year basis.

### **Driver License Requirement**

Some positions in their classification may require possession of a valid California driver's license.

Employees who drive on county business to carry out job-related duties must possess a valid California driver's license for the class of vehicle driven and meet automobile insurability requirements of the county. Eligibility for employment for those who do not meet this requirement due to disability will be reviewed on a case-by-case basis by the appointing authority.

## **SENIOR MANAGEMENT ANALYST**

### **CLASSIFICATION DEFINITION**

The Senior Management Analyst class is responsible for providing second-level supervision and management over programs and staff engaged in general administrative, personnel, staff developmental, fiscal, and/or program analysis for all or a portion of the staff services. This class supervises a group of employees that includes analysts performing professional journey-level work and, like the Management Analyst, personally handles the most difficult and sensitive work and complex analysis. A Senior Management Analyst directs staff over more than one function such as fiscal analysis, personnel, staff development, and program analysis.

The Senior Management Analyst is distinguished from the Management Analyst in that the former is a second-level supervisor/manager over staff and has primary responsibility for managing multiple programs and services.

### **TYPICAL DUTIES**

In addition to the typical duties of a Management Analyst, duties may include, but are not limited to, the following:

- Plans, organizes, manages, and supervises a group of employees including first-level supervisors and analysts.
- Establishes performance standards and provides feedback to employees.
- Supervises staff engaged in professional analytical and technical work in the formulation and administration of department or division budgets, development and management of grants, and contracts, management of department level procurement and/or coordination of personnel functions.
- Oversees the collection and analysis of data and makes recommendations on the formulation of policy and procedures, and staffing and organizational changes; conducts surveys and performs research and statistical analysis on administrative, fiscal, personnel, and/or programmatic problems.
- Participates in and supervises the design, implementation, and installation of new and revised programs, systems, software, procedures, methods of operation, and forms.
- Directs, supervises, and manages all of the administrative functions of a large department, through subordinate supervisors, including the compilation of materials and the preparation of budgets, reports, manuals, and publications.
- Ensures effective coordination of departmental activities with other departments, divisions, units and with outside agencies; represents the department head in committee meetings responds to the more sensitive and difficult complaints and requests for information.
- Oversees and directs recruitments and examinations, including outreach activities for equal employment opportunity recruiting.
- Provides direction and technical guidance on classification and pay studies, including job audits, salary surveys, class specification revisions, or new class development.
- Participates in labor relations activities including handling grievances and serving as a team member during negotiations.
- Determines training and development needs.
- Oversees staff engaged in the development and/or coordination of resources for training and staff development including workshops, college coursework, training programs, and on-the-job training sessions.
- Directs staff in conducting workshops and training sessions on a variety of topics including but not limited to technical skills, supervisory principles, customer service skills, safety, diversity, and sexual harassment training modules.
- Oversees and directs staff in performing various fiscal analyses and in the preparation of recommendations relating to the status of various fund balance projections, fiscal transactions, and

- related financial activities; analyzes findings and prepares recommendations for department management.
- Oversees the development of the budget or a portion of the budget including the proper expenditure coding, document preparation, and other financial-related activities: monitors budget for various units and projects.
  - Plans, directs, and supervises staff in identifying and analyzing program administration problems and develops solutions.
  - Reviews regulatory materials for program impact and possible review and revision of current systems and procedures.
  - Coordinates multi-disciplinary groups for program systems review.
  - Performs related duties as assigned.

### **EMPLOYMENT STANDARDS**

In addition to the knowledge and ability required of the Management Analyst position, employment standards may include, but are not limited to the following

#### **Knowledge of:**

- Principles and practices of public and business administration.
- Principles of personnel, budget, and program management.
- Governmental functions and organization.
- Principles and practices of supervision.
- Departmental program goals, requirements, and operations.
- Principles of public sector human resources administration.
- Principles and methods of position classification, examination administration development, job analysis and organization in the public sector; accepted practices to determine job content, evaluate complexity and difficulty of job duties, and identify required skills, knowledge, and abilities.
- Statistical methods used in selection and other human resources programs.
- Principles and practices of employee training and development.
- Adult learning processes.
- Variety of training programs for employee development.
- Effective communication, facilitation methods, and aids used for training programs and presentations.
- Budget preparations and control, accounting principles, and elementary statistical methods.
- Methods and procedures of governmental budget preparation and control.
- Financial statement preparation.
- Principles, methods and techniques of community organization and development, program planning and design, grant writing, budget development, and program evaluation.
- Theories, principles, goals, and objectives of public social services.
- Laws, rules, and regulations governing assigned program areas.

#### **Ability to:**

- Plan, organize, assign, and review the work of staff.
- Select, train, supervise, evaluate, and discipline subordinate staff.
- Analyze data and present ideas and information effectively.
- Identify problems and central issues and develop workable solutions.
- Consult with and advise managers and supervisors on a wide variety of matters.
- Recommend and implement changes, and/or improvements.
- Analyze problems, select alternatives, project consequences of proposed actions, and implement recommendations in support of departmental objectives.



- Understand, interpret and apply laws, rules, and regulations as they relate to various areas of responsibility.
- Speak and write effectively using proper English.
- Establish and maintain effective working relationships.
- Interpret and apply equal opportunity laws, civil service regulations, and provisions of contracts, ordinances, and negotiated agreements and other regulations or policies relating to human resources.
- Plan, coordinate, and implement training programs.
- Speak effectively and convey ideas clearly while facilitating group discussions and training sessions.
- Perform budget analysis, preparation and monitoring.
- Analyze and make effective recommendations regarding financial and accounting procedures.
- Apply social service planning principles and techniques to problems and issues.
- Build coalitions among groups with differing needs and objectives.
- Plan and evaluate social service programs.

**Minimum Qualifications (Education and/or Experience)**

**-Either-**

1. One (1) year of experience in a county system performing duties comparable to the Management Analyst class.

**-Or-**

2. One year of management and supervisory experience over a staff services function such as management, personnel, fiscal, or staff development.

**-And-**

A Bachelor’s Degree from an accredited college or university.

Note: Additional years of the required experience can substitute for up to two years of the required education.

**Driver License Requirement**

Some positions in this classification may require possession of a valid California driver’s license. Employees who drive on County business to carry out job-related duties must possess a valid California driver’s license for the class of vehicle driven and meet automobile insurability requirements of the County. Eligibility for employment for those who do not meet this requirement due to disability will be reviewed on a case-by-case basis by the appointing authority.

