



TAHOE CITY PUBLIC UTILITY DISTRICT Job Description

Job Title: Senior Management Analyst
Assigned To: Finance
Department: Governance & Administrative Services
Supervised By: Chief Financial Officer
FLSA Status: Exempt
Revision Date: July 2021

JOB SUMMARY

To perform complex analytical, administrative, and/or management duties and assume responsibilities within various District functions including budget and/or financial analysis and reporting, program/organizational analysis and reporting, project/program management, legislative analysis and development, business systems analysis and reporting, public information and communication, and contract administration. Work responsibilities require multi-department coordination and decision making.

PRIMARY AREA OF RESPONSIBILITY – FINANCE

Support the District’s long-term financial management goals through the evaluation and design of strategic financial planning process and policies. Prepare, evaluate, and communicate financial planning concepts and budget reports to District Management and Board of Directors. Support District Management in the preparation and management of the operating and capital budgets. Support District efforts to obtain grant funding and other funding sources necessary to achieve District goals.

DISTINGUISHING CHARACTERISTICS

The Senior Management Analyst is the advanced journey level professional classification in the Management Analyst series. This is a responsible position with emphasis on professional expertise, critical thinking, independent judgment and decision-making. Positions in this class are distinguished from the Management Analyst position by the degree of complexity of management, administrative, and support functions as well as the substantial knowledge of and interface with District operations, and other governmental entities required. Positions in this class have considerable latitude in the application of policy and follow general guidelines in accomplishing assignments

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the Chief Financial Officer.

Exercises technical and functional supervision over technical and administrative support personnel.

Exercises direct supervision over assigned staff.

ESSENTIAL FUNCTIONS

The duties listed are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.

- Manage or assist operating departments with various phases or tasks of assigned District budget preparation, administration, and reporting.
- Prepare cost estimates for budget recommendations; submit justifications for and monitor and control expenditures.
- Provide technical assistance to District staff in budget and financial planning and analysis.
- Act as representative and liaison to regulatory agencies, public agencies, elected officials, non-governmental organizations, customers, property owners, and operating departments related to assigned District projects and activities.
- Secure and manage grant funding, as assigned, for various District projects and operational needs and assure compliance with grant conditions.
- Participate in the development and implementation of District strategic plans, master plans, policies, procedures, and standards.
- Attend various committee/board and other governmental and non-governmental meetings and serve on various committees and task forces.
- Perform research and analysis of data for various District business operations, projects, and programs and make recommendations for improvement.
- Implement, track, and analyze strategic financial plans for District business operations.
- Participate in the implementation of District public relations and customer engagement plans.
- Provide persuasive and accurate justifications, written reports, and materials.
- Prepare and assist Management staff with reports for Board and committees, the public, and outside agencies.
- Conduct studies, analyze data, make recommendations, and prepare reports and presentations on a variety of subjects.
- Plan, prioritize, assign, supervise and review the work of staff involved in assigned workgroup.
- Recommend the appointment of personnel; train, motivate and evaluate personnel; provide or coordinate staff training; conduct performance evaluations; implement discipline procedures as required; maintain discipline and high standards necessary for the efficient and professional operation of assigned workgroup.
- Maintain regular attendance and adhere to prescribed work schedule to conduct job responsibilities.
- Establish, maintain, and foster positive and effective working relationships with co-workers and all others contacted in the performance of assigned duties.
- Utilize appropriate safety procedures and practices for assigned duties.
- Work safely and cooperatively with others.

ADDITIONAL DUTIES AND RESPONSIBILITIES

- Assist with planning, establishing goals, and budgeting, including recommending and implementing improvements and cost-saving measures.
- Supervise the work of contracted consultants and/or assigned District staff.
- Attend and participate in public and internal meetings.
- Perform all other duties as assigned.

EMPLOYMENT STANDARDS

1. Knowledge of:

- Principles and practices of financial planning, budgeting, and financial analysis.
- Principles and practices of organization and public administration.
- Procurement, management information systems, and contract administration.
- Research techniques, sources, and availability of information, and methods of report presentation.
- Applicable Federal, State, and local laws, rules and regulations pertaining to area of assignment.
- Administrative principles and methods including goal setting, program and budget development, work planning and organization.
- Equal employment/affirmative action guidelines and policies.
- Principles, methods, and practices of municipal finance and budgeting.
- Principles and practices of negotiation, leadership, motivation, team building, conflict management and dispute resolution.
- Principles of supervision, training, and performance evaluation.
- Modern office practices, methods, and computer equipment, including relevant software applications, i.e. – Microsoft Office Suite.
- Advanced Excel skills for complex queries to facilitate research and analysis.
- Project management principles and methods, including planning, goal setting, identifying, and managing stakeholder relationships and achieving agreed-on outcomes.
- Principles and practices of customer service.
- Safe work practices.

2. Ability to:

- Read, comprehend, interpret, and explain financial reports and plans, specifications, reports, calculations, schedules, permits, agreements, ordinances, policies, procedures, and any other document within the expertise of the incumbent.
- On a continuous basis, sit at desk for long periods of time; intermittently twist to reach equipment surrounding desk; perform simple grasping and fine manipulation; use telephone; write or use a keyboard to communicate through written means; and lift or carry weight of 50 pounds or less.
- Prioritize and exercise sound judgment within areas of responsibilities.
- Perform all job duties in an organized and efficient manner with the ability to adjust priorities and perform multiple tasks.
- Work effectively in a fast-paced environment, set priorities, and meet deadlines.
- Lead, supervise, train, and evaluate assigned staff in an effective and positive manner.
- Understand, interpret, and apply Federal, State, and local laws and codes and regulations pertaining to work assignments.
- Organize and prioritize a variety of tasks in an effective and timely manner for self and others.
- Act independently and make decisions conforming to District policies, procedures, standards, and ordinances.
- Review or prepare work product in a clear, accurate, and concise fashion in conformance with District standards.
- Monitor own work product for quality and accuracy.
- Review and analyze a variety of data, reports, and funding opportunities.
- Prepare persuasive written and presentation materials for projects and programs.
- Represent the District effectively in meetings and/or while making presentations.
- Operate a personal computer in a workgroup server environment, including proper file management.

- Operate and use modern office equipment including computers and applicable software at an advanced level.
- Read, write, and comprehend the English language at a level necessary for effective job performance exercising correct English usage, vocabulary, spelling, grammar, and punctuation.
- Communicate effectively, tactfully, and positively in both oral and written form.
- Understand both oral and written instructions and carry out in a positive manner.
- Establish, maintain, and foster positive working relationships with those contacted in the course of work.

EDUCATION AND TRAINING REQUIREMENTS

1. Education and Experience Requirements:

Any combination of education and experience which would likely provide the necessary knowledge and abilities is qualifying. A typical way to obtain the knowledge and abilities would be:

Education: A Bachelor's degree from an accredited college or university with major course work in accounting, finance, public or business administration, or closely related field.

Experience: Five (5) years of progressively responsible professional experience in a governmental agency or similar organization, in the field of finance or accounting or closely related field, including two (2) years of direct administrative or management responsibility.

2. Certification & Licensing Requirements:

- Possession of appropriate and valid driver's license and driving record that complies with District policy.

ENVIRONMENTAL CONDITIONS

Work is performed in a typical temperature-controlled office environment subject to typical office noise and conditions.

Position requires working beyond normal business hours, attendance at evening meetings and/or weekend work, and the ability to travel.

PHYSICAL JOB ANALYSIS

Daily Occurrence defined as: RARELY \leq one hour per day; OCCASIONALLY one to three hours per day; FREQUENTLY three to six hours per day; CONTINUOUSLY six to eight hours per day.

1. Gross Body Movement

<u>Activity</u>	<u>Daily Occurrence</u>
Sitting	Continuously
Standing	Occasionally
Walking	Occasionally
Walking on uneven terrain	Rarely
Driving	Rarely
Hearing	Continuously

Speaking	Continuously
Seeing	Continuously

2. Job-Specific Body Movement

<u>Activity</u>	<u>Daily Occurrence</u>
Bending at waist	Occasionally
Climbing (stairs/ladders/etc.)	N/A
Crawling	N/A
Crouching	Occasionally
Kneeling	Occasionally
Pushing (10 lbs.)	Occasionally
Pulling (10 lbs.)	Occasionally
Stooping	Occasionally
Working at heights	N/A
Working/Reaching above shoulder level	Occasionally
Working/Reaching below shoulder level	Occasionally
Working/Reaching at desk level	Continuously

3. Lifting

<u>Weight</u>	<u>Daily Occurrence</u>
1 to 10 lbs.	Frequently
11 to 25 lbs.	Occasionally
26 to 50 lbs.	Occasionally
51 to 75 lbs.	N/A
76 to 100 lbs.	N/A
Over 100 lbs.	N/A

4. Hand Coordination

<u>Activity</u>	<u>Daily Occurrence</u>
Hand	
Pulling	Occasionally
Pushing	Occasionally
Fine Manipulation	
Typing/Keyboard	Continuously
Calculator	Frequently
Writing	Continuously
Hand tools	Rarely
Equipment (nuts/bolts, etc.)	Rarely
Simple Grasping	
Files	Frequently

Computer mouse	Continuously
Phone receiver	Continuously
Power Grip	
Power tools	Rarely
Equipment (shovel, etc.)	Rarely
Arm	
Lateral	Frequently
Rotation	Occasionally

5. Height of Objects Reached/ Used

<u>Object</u>	<u>Height</u>
Filing cabinets	5 feet
Shelves/Storage	6" above head

6. Mental Requirements

<u>Activity</u>	<u>Daily Occurrence</u>
Analyzing	Continuously
Identifying	Continuously
Interpreting	Continuously
Knowing	Continuously
Observing	Frequently
Problem Solving	Continuously
Remembering	Continuously
Understanding	Continuously
Explaining	Continuously

APPROVED BY: Sean Barclay, General Manager on July 15, 2021