



**APPROVED BY: THE CHIEF
OPERATING OFFICER**

EFFECTIVE: November 2024

MANAGEMENT ANALYST I/II

Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are not intended to reflect all duties performed within the job.

DEFINITION

To provide management with analytical, decision-making support in the administration of assigned operations, programs and projects; to research and analyze practices and procedures and develop recommendations for organizational, operational, policy, and procedural improvements; conduct needs analyses, feasibility studies, and evaluations for assigned subject areas, programs, projects, and activities; and to perform a variety of tasks relative to assigned area of responsibility.

DISTINGUISHING CHARACTERISTICS

Management Analyst I

This is the entry-level class into the series. Initially under close supervision, incumbents perform analytical work within an assigned unit/division. Incumbents are either responsible for administering a clearly defined component within a project or program or are assigned analytical tasks in support of multiple projects, programs, or activities. As experience is gained, assignments become more varied and are performed with greater independence. Positions at this level are initially expected to perform most of the duties required of positions at the II level, but are expected to function at a lower skill level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. This classification level is distinguished from the II level in that the latter has a full understanding of analytical practices and District policies and procedures; researches and analyzes, and develops solutions to a wide range of issues; demonstrates sound judgment in selecting methods and techniques for obtaining solutions; and primarily deals with policies and operational financial, budgetary, legal, regulatory, political, and/or administrative issues which are complex in nature and diverse in scope. Advancement to the II level is based on demonstrated proficiency in performing the assigned functions, meeting the minimum qualifications of the II level, and is at management's discretion.

Management Analyst II

This is the journey-level class within the Management Analyst series. Incumbents support the work of unit/division management staff by providing a professional-level resource for operational, financial, budgetary, legal, regulatory, political, and/or administrative analyses and studies. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. Positions in this class are flexibly staffed and are normally filled by advancement from the "I" level, or, when filled by the outside, have limited experience. Work assignments are normally reviewed during the normal briefing cycle, generally upon completion, and for overall results. This class is distinguished from the Management Analyst I by the independent performance of the full range of professional duties, including developing, planning, and independently leading a project or research study from beginning to end, applying a broader knowledge base relative to assigned functional area(s), performing a greater complexity and variety of assignments. This class is further distinguished from the Senior Management Analyst in that the latter serves as a technical expert, using initiative and resourcefulness in deviating from traditional methods or researching trends and patterns to develop new methods, criteria, or proposed new policies and procedures, and/or manages complex, politically-sensitive, and/or division-wide or District-wide projects and initiatives that require a high level of expertise in support of management and/or Board priorities and directives.

SUPERVISION RECEIVED AND EXERCISED

Management Analyst I

Receives general supervision. The assigned duties for employees within this class require the exercise of judgment or choice among possible actions, sometimes without clear precedents and with concern for the consequences of the action. Employees may or may not work in proximity to their supervisor.

Management Analyst II

Receives direction. Employees within this class receive general instructions regarding the scope of and approach to projects or assignments, but procedures and techniques are left to the discretion of the employees.

May provide lead direction to assigned support staff.

TYPICAL DUTIES

The duties specified below are representative of the range of duties assigned to this class and are not intended to be an inclusive list. 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 this position. Management reserves the right to add, modify, change, or rescind the work assignments of different positions.

1. Perform a variety of professional-level research, administrative, operational, financial, and analytical duties in support of projects, programs, and activities within assigned unit/division; conduct studies, research projects, and analyses by selecting, adapting, and applying appropriate analytical, research, and statistical techniques.

2. Develop, implement, and manage, goals, objectives, policies, and priorities for assigned projects, programs, and activities; research, implement, and administer policies, procedures, and changing business practices and processes.
3. Provide short and long term planning objectives for assigned District program area; compile, analyze, and interpret various technical data to project future operational and resource needs.
4. Provide professional staff assistance to management staff; represent, participate on, and provide staff support to a variety of interdisciplinary committees and boards; develop and deliver staff presentations, reports and other correspondence as appropriate and necessary.
5. Develop and monitor assigned budget(s), including developing revenue projections, multi-year cash flow analyses, and cost containment strategies and tracking grant funds disbursement; identify funding opportunities and submit funding request applications; collect and analyze financial data; review and analyze funding requests and allocation changes to assigned budget(s); analyze variances and recommend corrective measures; and create data tracking and reporting systems.
6. Perform analytical work in the assigned subject area(s), such as human resources, recruitment, leave management, benefits administration, grant management, wellness, legislative analysis, contract management, financial analysis, budget, risk management, or policy development.
7. Analyze and evaluate critical and current legislation and determine possible effects upon the District; support and advocate appropriate legislation on behalf of District policy objectives.
8. Perform various analytical support duties, such as conducting studies on various operational, financial, budgetary, legal, legislative, regulatory, political, and/or administrative issues, evaluating existing and proposed policies and procedures, and participating in the development and measurement of industry benchmarks; consult with and advise unit/division staff and management; make recommendations and review and evaluate implemented changes.
9. Initiate solicitations, including requests for proposal and sole source requests to provide materials and services; facilitate pre-proposal meetings; coordinate and participate in the evaluation of submittals; draft and review terms and conditions of agreements; negotiate and execute contracts; prepare and submit Board Agenda items for contract approval; administer and manage contracts, ensuring compliance with all requirements.
10. Work with all levels of staff across the organization, governmental officials, and outside consultants and vendors to ensure timely and quality completion of projects/tasks; and monitor contracted consultants and vendors for compliance with contracts/purchase orders.
11. Develop materials and provide staff training; attend/lead meetings and seminars within the assigned subject areas.

12. Serve as a liaison to employees, public, and private organizations, community groups, and other organizations; provide information and assistance to the public regarding the assigned projects, programs, and activities; receive and respond to complaints and questions relating to assigned area of responsibility; and review problems and recommend corrective actions.
13. May serve as project manager for assigned analyses and auditing processes.
14. Employees have a responsibility for safety; for following safety regulations and safety policies and procedures applicable to their work.
15. Pursuant to California Government Code Section 3100, all public employees are required to serve as disaster service workers subject to such disaster service activities as may be assigned to them by their supervisors or by law.
16. Perform related duties and responsibilities as required.

QUALIFICATIONS

The level and scope of the knowledge, skills, and abilities listed in this section are related to the job duties as defined under Distinguishing Characteristics.

Management Analyst I

Knowledge of:

Principles and practices of public administration as applied to assigned operational unit and program administration.

Principles and practices of administrative, organizational, economic, and procedural analysis.

Methods and techniques used to analyze business/operational processes and recommend solutions for existing problems.

Principles of budget preparation, analysis, forecasting, and control.

Principles and procedures of financial recordkeeping and reporting.

Methods and techniques used to collect and analyze data and prepare reports based on findings.

Government agency programs such as, but not limited to, finance, budgeting, procurement, human resources, government relations, legal, water utility and watershed operations and management, and/or other related programs.

Organizational and management practices as applied to the analysis, evaluation, development, and implementation of programs, policies, and procedures.

Principles of business writing and report preparation.

Common desktop applications and software as well as specialized software related to the work.

Principles, practices, and responsibilities involved in leading work of assigned staff.

Ability to:

Learn the operations, policies, and procedures of the District and assigned area.
Perform accounting, auditing, financial, and fiscal systems analysis.
Analyze journals, ledgers, reports, and related information and recommend improvements to financial record-keeping systems.
Perform responsible and difficult administrative work involving the use of independent judgment and initiative.
Analyze, recommend, and develop improvements in operations, procedures, policies, and methods.
Coordinate and participate in administrative, budgeting, and fiscal reporting activities.
Organize and coordinate budget development processes.
Learn pertinent federal, state and local codes, laws, and regulations.
Prepare a variety of clear and concise administrative, financial, statistical, and analytical reports.
Collect, interpret, analyze, and evaluate varied information and data.
Organize and prioritize a variety of projects and tasks.
Train, organize, assign, and review the work of staff.
Communicate clearly and concisely, both orally and in writing.
Establish and maintain effective working relationships with those contacted in the course of work.
Use common desktop applications and software.

Training and Experience Guidelines

The following combination represents the minimum training and experience requirements for this classification:

Training

Equivalent to a Bachelor's degree from an accredited college or university with major coursework in public administration, business administration, accounting, finance, or a related field.

Experience

One (1) year of experience performing administrative, operational, management, or financial analysis of complex issues.

Substitution

Directly related experience may be substituted for the college requirement on the basis of one and one-half years of experience for one year of education to a maximum of four years.

License or Certificate

Possession of, or ability to obtain, an appropriate, valid California driver's license.

Positions that work in a school setting must submit and pass a tuberculosis test and criminal background check.

Management Analyst II

In addition to the knowledge and abilities for Management Analyst I:

Knowledge of:

Complex theories, principles, and practices of public administration as applied to operational unit and program administration.
Sources of information related to a broad range of District programs, projects, services, and administration.
Methods of quantitative and qualitative analyses to evaluate assigned projects, programs, and activities.
Applicable federal, state, and local laws, regulatory codes, ordinances, and procedures relevant to assigned area of responsibility.
Principles of budget preparation, analysis, forecasting, and control.

Ability to:

Perform responsible and difficult administrative work involving the use of independent judgment and personal initiative.
Coordinate and participate in administrative, budgeting, and fiscal reporting activities.
Independently identify, plan, and conduct management, financial, administrative, and operational studies.
Develop improvements in operations, procedures, policies, or methods.
Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
Perform quantitative and qualitative analyses to evaluate assigned projects, programs, and activities.
Develop and maintain specialized computer software and databases for gathering and analyzing data.
Interpret, apply, explain, and ensure compliance with applicable federal, state, and local policies, procedures, laws, and regulations, technical written material, and District policies and procedures.
Represent the unit/division and District in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.

Training and Experience Guidelines

The following combination represents the minimum training and experience requirements for this classification:

Training

Equivalent to a Bachelor's degree from an accredited college or university with major course work in public administration, business administration, accounting, finance, or a related field.

Experience

Three (3) years of experience performing administrative, operational, management, or financial analysis of complex issues.

Substitution

Directly related experience may be substituted for the college requirement on the basis of one and one-half years of experience for one year of education to a maximum of four years.

License or Certificate

Possession of, or ability to obtain, an appropriate, valid California driver's license.

Positions that work in a school setting must submit to and pass a tuberculosis test and criminal background check.

WORKING CONDITIONS

Environmental Conditions

Office environment; exposure to computer screens and copiers; moderate noise levels; and controlled temperature conditions.

Physical Conditions

Essential functions may require maintaining physical condition necessary for reaching, walking, standing or sitting for prolonged periods of time; extensive use of computer keyboard and mouse; light to moderate lifting; reaching above head; visual acuity for reading documents, correspondence and computer screens; operating a variety of manual and automated office equipment.

CLASS LEGEND

Established Date: 5/2018
Employee Groups: EA
Revisions Dates: 5/2019, 11/2024
FLSA Status: Non-exempt

	<u>Current</u>	<u>Previous</u>
Class Code:	XA2/5	
Series Code:	1XA	
Family Code:		
Previous Titles:		