

**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 to Office management, management of other City Departments, or to the Mayor and City Council.
2. Attends meetings with Office management, staff of other City Departments, and staff of elected officials to obtain and/or to provide information about the budget process and/or to hear various proposals and projects included in the proposed budget of a City Department or other issues related to City Operations.
3. Participates as a member of a committee or other working group 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 agreement on final products.
4. Makes direct presentations to the City Council, Council Committees, General Managers and/or others in order to gain support of proposed projects and/or to explain the need for and function of proposed projects.
5. Reads, reviews, and researches current, proposed, or amended legislation and determines the impact on City authority, operations, and/or finances in order to recommend a City position to either support, oppose, or amend legislation.
6. Coordinates regular and special meetings, including preparing meeting agendas and minutes, to ensure compliance with Brown Act requirements.

**B. Budget**

7. Examines 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 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 issues; statistics; staffing levels; and equipment needs in order to determine obligatory changes and/or changes in the work load which will be needed to continue current service levels and/or to 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. Researches supporting data submitted with budget requests by means such as going to sources for additional data, evaluating data in the original context, and/or getting additional opinions when supporting data includes estimates or projections which cannot be verified directly.
11. Consults with management staff of City Departments in order to verify needs for requested personnel, equipment, and/or expenses; to obtain additional information; and/or to clarify ambiguities and/or inconsistencies in Department budget requests.
12. Visits work areas personally to make personal observations of department operations such as effectiveness of present staff in meeting current work loads, condition and/or adequacy of equipment, and efficiency in use of other resources.
13. Compares benefits and costs of proposed service enhancements such as costs and expected benefits of new programs or projects, requests for additional personnel, and requests for conversion to new equipment.
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 including spread sheets and databases 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 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 to present and to justify budget recommendations for assigned Departments, to answer questions, and/or 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 to the Mayor's Office and the Department management in order to inform them of differences between their budget requests and the City Administrative Officer's recommendations, to answer questions, and to hear concerns about specific items and/or requests for additional revisions based on Department priorities.
19. Appears before City Council Committees and the City Council in order to present budgetary information and to answer questions.
20. Adds, deletes, or revises items in preliminary budget such as personnel changes, expense, or equipment purchases in order to reflect changes initiated by the Mayor, Budget and Finance Committee, or City Council.
21. Prepares material for support and explanation of the proposed budget for use in formal presentations or responses to questions such as charts and tables using presentation applications, spread sheets, and/or word processing computer software.
22. Assists in and/or coordinates preparation of proposed budget for printing by collecting, compiling, reviewing for completeness and/or proofreading budget documents such as the "blue book" and the final budget in order to produce budget documents for public dissemination.

### **C. Budget Administration**

23. Monitors status of revenue and expenditures by examining materials such as data from Department records, financial reports, and other sources of information in order to 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 work load 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 in order to determine the amount of funds to be transferred or other changes in the approved budget and/or to 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 to reflect changing operating department conditions.

27. Writes comprehensive written reports which include problems and current procedure analysis, descriptions of Department proposals, backgrounds and history, and discussion of alternative solutions to problems and recommendations.
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 Controller's Statement of Receipts and Departmental fee and revenue reports in order to monitor effectiveness of fees to recover costs and to determine projected revenues.
30. Reads or reviews requests from non-Council controlled Departments (Airports, Harbor, and Water and Power) and conducts studies on rate or fee increases, debt financing, 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 in order to have data available for reference when needed.
32. Analyzes data on topics such as wage and cost trends, nonproductive or absent time, employee turnover, and overtime in order to provide information to Department management and/or to make recommendations about salaries for various types of work and/or budget requests.
33. Reviews City Administrative Officer's reports and interviews 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 in order to recommend changes, to provide alternatives for improvement, or to 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. Analyzes data using tools such as flow charts, statistical sampling, checklists, and spreadsheet programs in order to identify alternative solutions to problems.
37. Holds meeting with Department management to discuss problem areas 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.
38. Discusses alternative solutions to problems in order to evaluate them, to determine the need for additional research and/or analysis, and/or to make recommendations.
39. Formulates recommendations for changes such as reorganization or changes in work methods or work methods or procedures based on research analyses in order to increase efficiency and/or reduce costs.

#### **E. Contract Analysis and Administration**

40. 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 in order to secure and award bids on necessary work in compliance with legal requirements, policies, procedures and funding requirements.
41. Writes reports on proposed contracts covering work tasks, products, services, payment and delivery schedules, and contractor qualifications in order to ensure compliance with the contract's stated purpose, City policies and procedures, funding, and legal requirements.
42. 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.
43. Assigns scores to bids or proposals using established criteria and individual judgment in order to recommend contractor selection and discusses scores with other bid selection team members in order to reach consensus on recommendations for selection.
44. Administers contracts by performing activities such as monitoring submission of timely draft reports, development of successful performance tests, or completion of services in order to determine contract compliance and to recommend approval of contract payment.

## **F. Capital Projects**

45. 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.
46. Visits sites of proposed capital projects with personnel from requesting Department and representatives from other Departments which may be involved such as Public Works Engineering or Building and Safety in order to evaluate operational needs, seismic considerations, and planning or design of the proposed project.
47. 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.
48. Determines eligibility of each project for monies from sources such as debt financing grants, General and specialized funds using guidelines, records of funding for similar projects, and personal knowledge.
49. 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.
50. Makes recommendations on project need and funding sources to the Mayor and City Council in order to obtain approval for projects.
51. Provides 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.
52. Discusses proposed projects with 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.
53. 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. Communications**

54. Ability to communicate orally sufficient to discuss work and other work-related information with supervisors, other City staff, and other interested parties, to discuss problems and possible solutions, to obtain information, and to explain applicable procedures and regulations.
55. Ability to read and to interpret material such as supervisors' instructions, reports or problems, or letters and memos sufficient to apply the information to specific situations.
56. Ability to read and to interpret financial documents and technical material related to matters such as budget preparation, employment statistics, funding capital projects, and revenue collection sufficient to apply them to specific situations.
57. Ability to communicate in writing sufficient to write clear and accurate memos, letters, and reports in desired formats using correct grammar and syntax.
58. Ability to interact with others with perseverance, patience, and tact including explaining matters such as requirements of City procedures, laws, ordinances, and regulations to persons who may have difficulty understanding or seeing another point of view.

## **H. Computer Use**

59. Retrieves data from and/or enters data in financial applications in order to have up to date information about matters such as accounting records and financial statistics.
60. Uses word processing programs for purposes such as writing reports, drafting letters, or preparing tables and schedules.
61. Uses spread sheets and/or other data management programs for purposes such as maintaining financial records, performing calculations and data analysis, and preparing charts and graphs.
62. Uses presentation software to create or modify materials such as charts, graphs, figures, or diagrams in order to present information in accessible formats.