

City of Coalinga

155 W. Durian

Coalinga, CA 93210

Financial Services Analyst

Pay Class: 29 Basic

FLSA Exempt

DEFINITION

Under general direction, performs advanced financial analysis and complex accounting work in support of the City's financial operations. Coordinates and participates in assigned financial programs and projects; analyzes financial and operational data; develops financial reports, forecasts, and performance measures; assists with budget development and process, ERP support, process improvement, and internal controls; performs complex financial analyses and account reconciliations; and provides technical support to departmental staff. Performs related duties as assigned.

EXAMPLES OF ESSENTIAL DUTIES

NOTE: Examples listed in this class specification represents but is not necessarily exhaustive or descriptive of duties assigned to this position. Each individual in this classification may not necessarily perform all the duties listed. Management reserves the right to assign other related tasks if such duties are a logical assignment for this position.

- Performs advanced financial analysis of revenues, expenditures, fund balances, and other financial data; identifies trends, evaluates financial performance, and develops recommendations to support management decision-making.
- Develops financial models, forecasts, and projections to support long-range financial planning, budget development, and strategic initiatives.
- Prepares, analyzes, and presents management reports, financial dashboards, key performance indicators (KPIs), and other statistical and operational reports for City management and departments.
- Conducts budget-to-actual and variance analyses; researches significant variances, identifies underlying causes, and recommends corrective actions or process improvements.
- Assists in the development, implementation, monitoring, and administration of the City's annual operating and capital budgets; reviews departmental budget requests for accuracy, completeness, compliance with City policies, and available funding.
- Provides technical assistance to departments in budget development, expenditure monitoring, revenue forecasting, and financial planning.
- Serves as the functional administrator for assigned financial management systems and enterprise resource planning (ERP) software; coordinates system testing, software upgrades, implementations, workflow improvements, report development, and end-user support.

- Develops, maintains, and updates financial system documentation, business process workflows, training materials, and user procedures to improve consistency, efficiency, and system utilization.
- Evaluates financial and operational processes to identify opportunities for increased efficiency, automation, improved internal controls, and regulatory compliance; recommends and assists with implementation of process improvements.
- Reviews departmental financial procedures and internal controls; identifies operational risks, evaluates the effectiveness of existing controls, and recommends corrective actions to strengthen accountability and safeguard City assets.
- Assists with implementation of recommendations resulting from internal and external audits and monitors corrective action plans to ensure compliance.
- Coordinates and participates in financial process improvement initiatives, special studies, organizational assessments, and strategic projects assigned by management.
- Researches and interprets applicable federal, state, and local laws, regulations, accounting standards, and best practices affecting municipal finance and provides recommendations regarding implementation.
- Assists with grant administration, including financial monitoring, reporting, reimbursement requests, compliance tracking, and grant closeout activities.
- Assists in conducting fee studies, cost allocation analyses, rate analyses, and other financial evaluations to support policy development and cost recovery objectives.
- Performs complex financial analyses and reconciliations to support budget monitoring, financial reporting, ERP implementation, and management decision-making; assists professional accounting staff with month-end and year-end activities, audit preparation, and special accounting projects.
- Coordinates with City departments, outside agencies, consultants, auditors, and software vendors to exchange information, resolve issues, and support City financial operations.
- Provides technical guidance and training for departmental staff regarding financial systems, accounting procedures, budgeting, and reporting processes.
- Performs other related duties as assigned.

MINIMUM QUALIFICATIONS

NOTE: The specifications listed below outline the desirable qualifications necessary for entry into the class and do not necessarily convey the qualifications of incumbents within the position.

Education: Associate's degree from an accredited college or university in Accounting, Finance, Business Administration, Public Administration, or a closely related field. A bachelor's degree is desirable.

Experience: Four (4) years of progressively responsible experience in governmental accounting, budgeting, financial analysis, utility account auditing and reconciliation, financial systems administration, or related municipal finance functions. Experience as an Account Technician or equivalent is highly desirable.

Licenses: Possession of a valid Class C California Driver License at time of appointment.

Other: Must be a U.S. citizen or Legal Resident Alien and pass a live scan through the Department of Justice.

KNOWLEDGE, SKILLS AND ABILITIES

NOTE: *The following are a representative sample of the KAS's necessary to perform essential tasks of the position.*

Knowledge of:

- Principles and practices of technical and functional supervision and training.
- Principles and practices of financial and statistical record keeping and advanced analytical research.
- Practices and methods of governmental accounting, auditing, and financial reporting.
- Pertinent local, State and Federal laws, rules and regulations related to area of assigned responsibilities.
- Principles and practices of account reconciliation, accounts receivables, accounts payable, utility billing, business licenses and other financial transactions.
- Internal control principles and methods of applications.

Skill and Ability to:

- Assists with year-end closing of accounts and budget reconciliation.
- Assists in completing and reviewing complex bank and general ledger reconciliations.
- Assist in the preparation of financial statements, management reports, and analytical reports.
- Participate in auditing accounting systems and procedures to ensure proper internal control and compliance with policies.
- Communicate clearly and concisely, both orally and in writing.
- Assists with preparation of the City budget; gathers costs and factors in variable circumstances in making budget calculations.
- Assist with preparing clear and concise reports, training guides, proposals, and system documentation
- Reconcile accounts payable and accounts receivable, deposits, and payroll.
- Interpret and apply relevant laws, regulations, policies, and procedures
- Learn new software platforms and tools quickly and train others in their use
- Prepare process and procedure workflows
- Exercise sound judgment, maintain confidentiality, and work independently with minimal supervision

- Understand, interpret, and apply general accounting and auditing principles, procedures, and methods, to develop, maintain, and audit financial and statistical reports.

ATTITUDE

Must demonstrate initiative, professionalism, and a commitment to service excellence. A positive and cooperative attitude is essential to ensure effective teamwork and departmental support.

PHYSICAL AND PSYCHOLOGICAL REQUIREMENTS

NOTE: *The physical and psychological demands described are representative of those that must be met to perform the essential duties of this classification. Reasonable accommodations may be made for qualified individuals.*

- Ability to sit for extended periods of time while working at a computer workstation.
- Manual dexterity and hand-eye coordination sufficient to operate standard office equipment including computers, printers, copiers, and telephones.
- Ability to lift, carry, push, or pull objects up to 25 pounds occasionally.
- Visual acuity to read printed materials and computer screens for extended periods.
- Ability to hear and communicate effectively in person, by telephone, and in meetings.
- Occasional travel to off-site meetings, training sessions, or work locations may be required.
- Ability to concentrate and remain focused in a dynamic office environment with frequent interruptions.
- Capacity to work under pressure with competing deadlines and changing priorities.
- Emotional resilience to handle constructive feedback, stakeholder input, and project-related challenges.
- Ability to exercise sound judgment, maintain confidentiality, and manage sensitive information.
- Willingness to adapt to technological changes and organizational improvements.
- Strong sense of initiative, responsibility, and ethical conduct in all work assignments.

Approved by: _____
Sean Brewer, City Manager Date