



Gavin Newsom
Mayor

Micki Callahan
Human Resources Director

**NOTICE OF FINAL ACTION TAKEN BY THE
HUMAN RESOURCES DIRECTOR**

Date: September 28, 2009

Re: **Notice of Proposed Classification Actions –Final Notice No. 10 FY 2009/2010 (copy attached)**

In the absence of requests to meet addressed to the Human Resources Director, the classification actions contained in the above referenced notice became effective September 28, 2009.

Micki Callahan
Human Resources Director

by:

A handwritten signature in black ink, appearing to be "Steve Ponder", written over a horizontal line.

Steve Ponder
Classification and Compensation Manager
Human Resources

cc: All Employee Organizations
All Departmental Personnel Officers
Micki Callahan, DHR
Cathy Abela DHR
Carmela Villasica, DHR
Linda Cosico, DHR
Christina Fong, DHR
Rich David, DHR
John Leon, DHR
Anita Sanchez, CSC
Harvey Rose, Budget Analyst
Tinhha Luong, CON
Ron Bladow, MTA
Johnny Zabala, CON
RAS Team Leader(s)
DHR Support Services
File

**NOTICE OF PROPOSED CLASSIFICATION ACTIONS BY
THE HUMAN RESOURCES DIRECTOR**

The following actions are being posted in accordance with Rule 109. In the absence of requests to meet addressed to the Human Resources Director, the proposed changes will become final seven (7) calendar days from the posting date.

Posting No: 10
Fiscal Year: 2009/2010
Posted Date: September 21, 2009

AMEND THE FOLLOWING JOB SPECIFICATION(S):
(Final job specifications attached.)

Item #	DEPT/ DIVISION	Class/Title
1	HRD	1844 Senior Management Assistant

Item #	DEPT/ DIVISION	Class/Title
2	HRD	1842 Management Assistant

Item #	DEPT/ DIVISION	Class/Title
3	HRD	1825 Principal Administrative Analyst II

Item #	DEPT/ DIVISION	Class/Title
4	HRD	1824 Principal Administrative Analyst

Item #	DEPT/ DIVISION	Class/Title
5	HRD	1823 Senior Administrative Analyst

Posting No: 10
Fiscal Year: 2009/2010
Posted Date: September 21, 2009

Item #	DEPT/ DIVISION	Class/Title
6	HRD	1822 Administrative Analyst

For additional information regarding the above proposed action, please contact Cathy Abela at (415) 557-4933.

Requests to meet on an item should be addressed to the Human Resources Director, 1 South Van Ness, 4th Floor, San Francisco, CA 94103. All requests must be received in writing no later than close of business seven (7) calendar days from the posting date. FAX'd copies will be accepted as timely with original to follow. Copies of this notice may be obtained from the Information Center, 1 South Van Ness, 4th Floor or from DHR's website at:
http://www.sfgov.org/site/sfdhr_page.asp?id=102488

cc: All Employee Organizations
All Departmental Personnel Officers
Anita Sanchez, CSC
Harvey Rose, Budget Analyst
Christina Fong, DHR
Carmela Villasica, DHR
Linda Cosico, DHR
RAS Team Leader(s)
DHR Support Services
Martin Gran, DHR
Steve Ponder, DHR
Cathy Abela, DHR
Karen Taylor, MTA
File

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Senior Management Assistant
Job Code: 1844**

INTRODUCTION

Under direction, the Senior Management Assistant performs difficult and complex professional level administrative and/or management duties in a variety of functional areas, such as: office/operations management; budget development, administration and fiscal reporting; development and administration of contractual agreements, leases and grants; evaluation and development of management policies and procedures; management of department specific programs and functions. Performs related duties as assigned.

DISTINGUISHING FEATURES

Class 1844 Senior Management Assistant is the highest level in the management assistant series. It is distinguished from the next lower class, 1842 Management Assistant, in that its assignments are of a more difficult and complex nature.

Supervision Exercised: Depending on assignment, may supervise assigned clerical, technical and subordinate professional staff.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Manages the resources and staffing of an office, section, operation or program: monitors available budget and maximizes use of existing staff and resources; recommends changes in staffing and/or acquisition of equipment/materials; oversees various staffing and personnel-related functions; oversees purchasing, billing and inventory control; coordinates building security, maintenance and utilization of space.
2. Manages the functions of an office, section, operation or program: plans, prioritizes and schedules workload, delegating specific tasks as necessary to subordinate staff ; coordinates and oversees clerical & technical support activities; monitors productivity and evaluates outcomes; compiles and produces a variety of status reports for management; ensures compliance with established departmental policies, procedures and goals, as well as legal requirements and regulatory mandates.
3. Supervises the work of assigned staff: plans, assigns, directs and reviews work; monitors and evaluates performance of subordinate personnel; completes performance appraisals and counsels employees; provides training and aids in staff development; fosters cooperation and teamwork amongst staff.
4. Coordinates work and/or planning functions with other offices, programs, agencies, contractors, departments and members of the public to meet established goals and objectives: acts as liaison and promotes good working relationships with other offices, programs, agencies, contractors, departments and members of the public; addresses issues relevant to assigned office, program, operation or section with departmental personnel, representatives of other departments and outside agencies, and members of the public,

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**Title: Senior Management Assistant
Job Code: 1844**

including resolution of problems and complaints; arranges meetings, develops agenda and conducts meetings as needed; participates in department meetings, including making presentations; may represent department at meetings and hearings.

5. Performs a variety of research and reporting functions: identifies issues; consults with departmental personnel and other individuals/experts; evaluates information and documentation from a wide variety of sources; conducts surveys and needs assessment; gathers, compiles and analyzes statistical and other data; writes reports and prepares documentation for evaluation by management and/or administrative staff; presents reports and data, including formal presentations to groups.

6. Develops and/or recommends policies, procedures and work practices for an office, program, operation or section: reviews and evaluates existing policies, procedures and work practices; consults with managers, administrators and other staff; views and evaluates the effect of proposed and existing legislation, regulations and law on organizational structure and operations; develops/recommends and implements changes to policies and procedures in compliance with overall City/departmental policies and goals.

7. Performs or assists in budget development, resource planning, and fiscal reporting: assesses staff and resource needs of office, program, operation or section based on research and consultation with managers and administrative staff; reviews budget requests from departmental managers; assists in development of annual departmental budget; monitors revenues and/or expenditures; performs fiscal/financial analysis; gathers information and prepares reports related to budget, fiscal, resource and staffing issues.

8. Develops and administers contractual agreements: develops language and specifications; prepares contractual documents; prepares requests for proposals and bid solicitation; consults with departmental staff to ensure that departmental requirements are accurately described; evaluates bid information provided by contractors/vendors; establishes and maintains contractual relationships; monitors legal agreements to ensure ongoing compliance.

9. Monitors and oversees grants received and/or disbursed by department: when overseeing grants received by department, prepares grant proposals, reviews funding limitations and other requirements specified by grantor, monitors departmental expenditures to ensure funding limitations are not exceeded, monitors other criteria to ensure compliance with standards required by grantor; when overseeing grants awarded and disbursed by department, determines fund for specific grant categories, drafts grant guidelines and eligibility requirements, reviews grant applications for compliance with guidelines/requirements, creates and leads panels that make recommendations for grant awards, may provide technical assistance to grantees to assure ongoing compliance with terms of grant

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: principles, procedures, protocols, legal standards and regulations utilized in a variety of management and administrative functions such as: management and/or supervision of an office, program, operation, section or facility; budget planning and development; financial/fiscal monitoring and reporting activities; evaluation and development of management policies and procedures; evaluation of existing and proposed legislation,

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Job Code: 1844**

legal standards & regulatory mandates; development and administration of contractual agreements; grant oversight and monitoring.

Ability to: interpret and apply established management and supervisory principles, policies and procedures; plan, assign, train, direct and monitor the work of assigned staff; evaluate performance and counsel employees; effectively utilize existing staff and resources; direct, monitor and evaluate the functions, staffing and resources of a program, office or section, including projection of staffing and material needs; develop and/or make recommendations for operational methods, policies and procedures, including implementation of changes and evaluation of impact; prioritize and organize multiple assignments and projects for self and others; exercise sound judgement and appropriately refer issues to managers; coordinate work and functions with other offices, programs or sections; ensure compliance with established policies and procedures; facilitate attainment of established goals and objectives; identify, gather and evaluate information from a variety of sources; formulate logical conclusions and develop effective courses of action and/or recommendations; use computer applications, including e-mail, word processing, spreadsheets, databases and the internet to prepare correspondence, reports and other documentation, extract and process information and create and maintain records; prepare clear, accurate and well-organized reports, memos, and correspondence; speak clearly and concisely in order to effectively express ideas and communicate work-related information to a variety of individuals and groups; listen, ask appropriate questions and effectively elicit information; establish and maintain effective working relationships with staff, officials and the general public.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

1. Possession of a Baccalaureate Degree from an accredited college or university with major coursework in public or business administration, accounting, finance, economics, social sciences, education or related fields, or other subject areas closely related to a specific departmental program or function; AND

2a. Three (3) years full-time equivalent experience performing professional-level management and/or administrative duties in functional areas such as: program/office/operations management, budget development and/or administration, development and administration of contractual agreements and/or grants, or other closely related functional areas;

Substitution: Applicants may substitute up to 2 years of the required education with additional qualifying experience in program/office/operations management, budget development and/or administration, or contract/grant administration. One year (2000 hours) of additional qualifying

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**Title: Senior Management Assistant
Job Code: 1844**

experience will be considered equivalent to 30 semester units/45 quarter units.

LICENSE AND CERTIFICATION

PROMOTIVE LINES

From: Management Assistant

ORIGINATION DATE: January 4, 1962

AMENDED DATE: October 29, 1999; December 27, 2002; September 28, 2009

REASON FOR AMENDMENT *To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.*

BUSINESS UNIT(S): COMMN, SFMTA

**CITY AND COUNTY OF SAN FRANCISCO
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**Title: Management Assistant
Job Code: 1842**

INTRODUCTION

Under general supervision, the Management Assistant performs professional-level administrative and/or management duties in a variety of functional areas, such as: office/operations management; budget development, administration and fiscal reporting; development and administration of contractual agreements and grants; and evaluation and development of management policies and procedures, including evaluation of impact of existing and proposed legislation.

DISTINGUISHING FEATURES

Class 1842 Management Assistant is distinguished from Class 1844 Senior Management Assistant in that the latter performs duties of a more difficult and complex nature. Class 1842 Management Assistant is distinguished from Class 1840 Junior Management Assistant in that the latter is an entry level class performing less difficult and complex duties with no supervision of professional staff.

Supervision Exercised: Depending on assignment, may supervise assigned clerical, technical and subordinate professional staff.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Manages or assists in management of the resources and staffing of an office, section, operation or program; monitors available budget and maximizes use of existing staff and resources for office, program or section; recommends changes in staffing and/or acquisition of equipment/materials; oversees various staffing and personnel-related functions; oversees purchasing, billing and inventory control; coordinates building security, maintenance and utilization of space.
2. Manages or assists in management of the functions of an office, section, operation or program; plans, prioritizes and schedules workload, delegating specific tasks as necessary to subordinate staff; coordinates and oversees clerical and technical support activities; monitors productivity and evaluates outcomes; compiles and produces a variety of status reports for management; ensures compliance with established departmental policies, procedures and goals as well as legal requirements and regulatory mandates.
3. Supervises or assists in supervising the work of assigned staff; plans, assigns, directs and reviews work; monitors and evaluates performance of subordinate personnel; completes performance appraisals and counsels employees; fosters cooperation and teamwork amongst staff; provides training and aids in staff development.
4. Coordinates or assists in coordinating work and/or planning functions with other offices, programs or sections to meet established goals and objectives; acts as liaison and promotes good working relationships with other offices, programs, sections and departments; addresses or assists in addressing issues relevant to assigned office, program or section with departmental personnel, representatives of other departments and outside agencies,

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Job Code: 1842

and members of the public; arranges meetings and assists in development of agenda; participates in department meetings, including making presentations; may represent department at meetings and hearings on specific issues.

5. Performs and/or assists management in a variety of research and reporting functions; identifies issues; consults with departmental personnel and other individuals/experts; evaluates proposals, information and documentation from a wide variety of sources; conducts surveys and needs assessment; gathers, compiles and analyzes statistical and other data; writes reports and prepares documentation for evaluation by management and/or administrative staff; presents reports and data, including formal presentations to groups.

6. Assists in development of policies, procedures and work practices of an office, program, operation or section; reviews and evaluates existing policies, procedures and work practices; consults with managers, administrators and other staff; reviews and evaluates the effect of proposed and existing legislation, regulations and law on organizational structure and operations; assists in development and implementation of changes to policies and procedures in compliance with overall City/departmental policies and goals.

7. Assists in budget development, resource planning, and fiscal reporting; assesses staff and resource needs of office, program, section based on research and consultation with managers and administrative staff; assists in review of budget requests from departmental managers; assists in development of annual departmental budget; monitors revenues and/or expenditures and reconciles accounts; assists in fiscal/financial analysis; gathers information and writes or assists in writing reports related to budget, fiscal, resource and staffing issues.

8. Assists in development, implementation and administration of competitive bid processes and contractual agreements; assists in the development of language and specifications; prepares or assists in preparing contractual documents; assists in preparation of requests for proposals and bid solicitation; consults with departmental staff to ensure that departmental requirements are accurately described; assists in evaluation of bid information provided by contractors/vendors; assists in establishment and maintenance of contractual relationships; assists in monitoring and enforcement of legal agreements to ensure compliance.

9. Assists in the monitoring and oversight of grants received by department; prepares or assists in preparing grant proposals; reviews funding limitations and other requirements specified by grantor; assists in monitoring departmental expenditures to ensure funding limitations are not exceeded; assists in monitoring other criteria to ensure compliance with standards required by grantor.

10. Performs related duties as assigned

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: the principles, procedures and legal standards utilized in a variety of management and administrative functions such as supervision and/or management of an office, program, operation or section or facility; budget planning and development; financial/fiscal monitoring and reporting activities; evaluation and development of management policies and procedures; evaluation of existing and proposed legislation and regulatory mandates; development and administration of competitive bid processes and contractual agreements; and grant oversight and monitoring.

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**Title: Management Assistant
Job Code: 1842**

Ability to: identify, gather and evaluate information from a variety of sources; formulate logical conclusions and develop effective courses of action and/or recommendations; use computer applications, including e-mail, word processing, spreadsheets, databases and the internet to prepare correspondence, reports and other documentation, extract and process information and create and maintain records; prepare clear, accurate and well-organized reports, memos, and correspondence; speak clearly and concisely in order to effectively express ideas and communicate work-related information to a variety of individuals and groups; listen, ask appropriate questions and effectively elicit information; establish and maintain effective working relationships with staff, officials and the general public; respect right of privacy and exercise discretion; interpret and apply established management and supervisory principles, policies and procedures; plan, assign, train, direct and monitor the work of assigned staff; evaluate performance and counsel employees; effectively utilize existing staff and resources; plan and direct the functions of a program, office or section; prioritize and organize multiple assignments and projects; exercise sound judgement and appropriately refer issues to managers/administrators; coordinate work and functions with other offices, programs or sections; ensure compliance with established policies and procedures; and facilitate attainment of established goals and objectives.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

1. Possession of a Baccalaureate Degree from an accredited college or university with major coursework in public or business administration, accounting, finance, economics, social sciences, education or related fields, or other subject areas closely related to a specific departmental program or function; AND
2. One (1) year full-time equivalent experience performing professional-level management and/or administrative duties in functional areas such as: program/office/operations management, budget development and/or administration, development and administration of contractual agreements and/or grants, or other closely related functional areas.

Substitution: Applicants may substitute up to 2 years of required education with additional qualifying experience in program/office/operations management, budget development and/or administration, or contract/grant administration. . One year (2000 hours) of additional qualifying experience will be considered equivalent to 30 semester units/45 quarter units.

LICENSE AND CERTIFICATION

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Management Assistant
Job Code: 1842**

PROMOTIVE LINES

TO: Senior Management Assistant

FROM: Junior Management Assistant

ORIGINATION DATE: October 5, 1961

AMENDED DATE: March 2, 2001, September 28, 2009

REASON FOR AMENDMENT *To accurately reflect the current tasks, knowledge, skills and abilities defined in the most recent job analysis conducted for this job code.*

BUSINESS UNIT(S): COMMN, SFMTA

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Principal Administrative Analyst II
Job Code: 1825**

INTRODUCTION

Under administrative direction plans, organizes, leads and may supervise staff engaged in difficult, complex, sensitive, and detailed analytical work including complex quantitative analysis in the areas of budget, contracts, financial/fiscal, economic, legislative and administrative policies.

DISTINGUISHING FEATURES

Class 1825 Principal Administrative Analyst II is a unique level in the Administrative Analyst professional/supervisory/management series. It is distinguished from the next lower level of 1824 Principal Administrative Analyst by its assignment of complex finance and utility analysis, project finance pro-forma development, forecast modeling, debt finance risk management, and statistical modeling typically involving the use of specialized analytical software, complex business intelligence systems and complex analysis of data. Positions in this class maintain senior levels of responsibility with greater independence of action and consequence of error in designing business solutions, formulating recommendations and achieving effective decisions. The financial impact of the work performed by incumbents in these positions is significant, potentially involving hundreds of millions of dollars.

Supervision Exercised: Class 1825 Principal Administrative Analysts II typically supervises staff including lower-level administrative analysts, and/or complex, cross-functional project teams staffed with professional level employees.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Working independently, researches, analyzes and makes policy recommendations on unique special projects with significant financial impact or highly visible public issues; may direct mission critical financial or operational activities; responds to informational requests, including those of a highly sensitive nature, and may represent the department to the Mayor's Office, Board of Supervisors, Controller's Office, other city officials, outside agencies and the public; acts as executive assistant and provides administrative analysis including complex forecast modeling to high-level managers or a department head.
2. Plans, develops and directs the production of highly complex departmental budget(s); advises management in the budget development and management process, including formulating policy, monitoring, reporting and interpreting budget documents; may negotiate budget proposals within the department and with the Mayor's Office, Board of Supervisors, and other agencies; prepares or supervises staff in the preparation of, budget line-item narratives, complex analyses, recommendations and justification based on complex statistical analyses for annual, supplemental and multiyear requests.

**CITY AND COUNTY OF SAN FRANCISCO
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**Title: Principal Administrative Analyst II
Job Code: 1825**

3. Establishes, administers, monitors, coordinates and acts as liaison regarding application for and management of the extremely complex, multiple source capital project and/or grants; ensures compliance of fund reallocations with funding agency requirements; analyzes trends in expenditures and revenues for multi-year budgets; prepares financial/statistical reports for management, Mayor's Office, Board of Supervisors, Controller's Office and other funding agencies; coordinates and monitors departmental reporting to funding agencies including the subvention of funds to contracting organizations and justifies that funds are used as required.

4. Plans, develops, performs and directs work involving extremely complex economic and/or financial analysis including finance and utility rate analysis and modeling, cost/benefit analysis, and capital planning for senior management; determines appropriate methodology and performs difficult financial analyses, including financial forecasting, revenue and/or expense projections, capital requirements, calculation of debt capacity and evaluation of financing alternatives utilizing specialized analytical software to produce complex analysis or data; makes written and oral recommendations on difficult administrative and fiscal issues.

5. Analyzes, evaluates, interprets, and implements new and existing governmental accounting pronouncements and technical guidance; identifies problems with, develops and implements changes to current financial policies and procedures; may coordinate and oversee the annual financial audit including preparation of audit schedules and governmental accounting standards, local, state, and federal regulations.

6. Identifies and analyzes highly complex existing, newly enacted and proposed local, state, federal legislation policies and procedures projecting potential impact; advises management on the consequences of proposed and pending legislation and effectively presents recommendations; develops and recommends procedures for the citywide implementation of enacted legislation; may act as legislative liaison to other departments; assists state and federal legislative staff in drafting legislation; advocates and testifies regarding department's position to legislators, committees, and staff; develops comprehensive user manuals to implement legislation, programs and administrative policies.

7. Researches, analyzes, forecasts and makes policy recommendations on special projects or highly visible public issues including administrative policies, practices, and procedures; manages implementation of new systems, policies, and procedures.

8. Plans and directs difficult and detailed staff work involving: preparation of MBE/WBE and contract status reports; conducting competitive contract vendor selection processes including public bids and Requests For Proposals, ensuring adequate and economic distribution of advertisement, requests for proposals and public notices; process highly complex contracts including advertising for bids/proposals, receipt and review of bids, contract negotiation and award and routing through signature/documentation process to

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**Title: Principal Administrative Analyst II
Job Code: 1825**

certification; coordinate with staff from purchasing, Human Resources, Human Rights Commission, and the Administrative Services office; and provide training and assistance to staff and contractors on departmental and City contracting policies, procedures, and requirements.

9. Reviews, prepares, and analyzes cost estimates and terms for financially significant new and existing contracts, change orders, and modifications; prepares reports of analyses and related documents; analyzes claims for additional cost reimbursement to determine validity; analyzes contract provisions to determine appropriate reimbursement amount; conducts negotiations with contractors with regard to additional contract terms, cost reimbursement and change order provisions; prepares reports regarding claim status, settlement activities and reimbursement amounts for use by management and city Attorney's Office; maintains records of negotiations.

10. Independently reviews and evaluates financial and business models utilized within an organization. Conducts reviews and appraisals of business models and discusses review findings and recommendations with senior and executive management. Utilizes statistical models to forecast particular outcomes or events.

11. Performs related duties and responsibilities as assigned

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: principles and techniques of governmental organization and management: the principles and techniques of financial/fiscal analysis and budgeting; principles and techniques of economic and policy analysis; principles and techniques of generally accepted accounting principles and government accounting standards; application of statistical and other analytical methods, knowledge of methods and techniques of data collection and analysis; specialized analytical software; applicable local, state, and federal laws and regulations affecting departmental operations; principles involved in the development and implementation of complex systems and procedures; methods, procedures, and techniques needed for negotiations of contract terms, change orders, cost estimates and modifications.

Ability to: collect, synthesize, and analyze a wide variety of information; conduct extremely difficult analytical studies involving complex administrative and financial systems and procedures and significant financial impact; work with complex business intelligence systems; to oversee programmers and software developers in the production of complex analysis or data; temporarily manage complex, cross-functional project teams; work with authority to identify and define problems, determine methodology evaluate data, make recommendations with appropriate justification and develop/implement a plan of action; plan, prepare, review, and present clear and concise findings and reports; assign and direct the work of subordinates and other staff; establish and maintain effective oral communication with management, officials, representative of other agencies, contractors, and the general public; negotiate effectively; use personal computer and software programs as utilized in

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various departments

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

1. Possession of a graduate degree (Master's degree or higher) from an accredited college or university AND seven (7) years full-time equivalent experience performing professional level analytical work as described in Note A; OR
2. Possession of a graduate degree (Master's degree or higher) from an accredited college or university with major college coursework as described in Note B and six (6) years full-time equivalent experience performing professional level analytical work as described in Note A; OR
3. Possession of a baccalaureate degree from an accredited college or university and eight (8) years of full-time equivalent experience performing professional level analytical work as described in Note A; OR
4. Possession of a baccalaureate degree from an accredited college or university with major college coursework as described in Note B and seven (7) years full-time equivalent experience performing professional level analytical work as described in Note A

SUBSTITUTION: Applicants may substitute up to 2 years of the required education with additional qualifying experience in budget analysis, financial analysis and reporting, legislative/policy analysis, or contract/grant administration. One year (2000 hours) of additional qualifying experience will be considered equivalent to 30 semester units/45 quarter units.

Notes on Qualifying Experience and Education:

A. Qualifying professional-level analytical experience must be in one or more of the following functional areas: complex budget analysis, development and administration; complex financial/fiscal analysis and reporting; development of complex contracting systems and administration of competitive bid processes and complex contractual agreements; development and evaluation of complex management/administrative policy; complex grant administration and monitoring; complex program evaluation and planning; complex legislative analysis; complex economic analysis; or other functional areas related to the duties of positions in Class 1825, where the primary focus of the job is complex professional-level analysis for evaluation, recommendation, development and implementation of major programs and functions of department/organization. Analytical experience equivalent to the duties of Class 1824 is considered qualifying.

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Job Code: 1825**

B. Coursework applicable to a baccalaureate or higher degree in specialized subject matter areas such as public or business administration, management, business law, contract law, public policy, urban studies, economics, statistical analysis, finance, accounting or other fields of study closely related to the essential functions of positions in Class 1825.

LICENSE AND CERTIFICATION

None

PROMOTIVE LINES

From: 1824 Principal Administrative Analyst

ORIGINATION DATE: 02/23/2007

AMENDED DATE: 9/28/09

REASON FOR AMENDMENT *To accurately reflect the current minimum qualifications defined in the most recent job analysis conducted for this job code.*

BUSINESS UNIT(S): COMMN, SFMTA

**CITY AND COUNTY OF SAN FRANCISCO
DEPARTMENT OF HUMAN RESOURCES**

**Title: Principal Administrative Analyst
Job Code: 1824**

INTRODUCTION

Under general administrative direction, the Principal Administrative Analyst plans, organizes, supervises and conducts important, difficult, complex, and sensitive analytical work that has substantive impact on the operations of a City department, agency or program in areas such as: the development and administration of the annual budget; financial/fiscal and economic analysis and reporting; monitoring and administration of multiple-source capital projects and grants; development of complex contracting systems and administration of complex contractual agreements; development and evaluation of major administrative/management systems, functions, policy and procedures, including evaluation of the impact of existing, newly enacted and proposed legislation, regulations, law, court decisions and memoranda of understanding; and/or major program evaluation and planning

DISTINGUISHING FEATURES

Class 1824 Principal Administrative Analyst is distinguished from the next lower level of 1823 Senior Administrative Analyst by its assignment of greater and/or more complex financial responsibilities, its performance and supervision of more difficult, complex, and sensitive projects and negotiations; and its greater independence of action and consequence of error in formulating recommendations and decisions. Class 1825 Principal Administrative Analyst II is distinguished from the next lower level of 1824 Principal Administrative Analyst by its assignment of specialized and/or more complex financial responsibilities, its performance and supervision of complex finance and utility analysis, project finance proforma development, forecast modeling, debt finance risk management, and statistical modeling typically involving the use of specialized analytical software, complex business intelligence systems and complex analysis of data.

Supervision Exercised: Class 1824 Principal Administrative Analysts typically supervises staff including lower-level administrative analysts.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Directs, oversees and conducts difficult, sensitive, highly visible and complex analytical work that has significant impact on the functions and operations of assigned department; confers with senior management staff to discuss, evaluate and make policy recommendations on special projects and/or a variety of complex, sensitive or highly visible administrative, organizational, policy, budget, fiscal, and other issues related to important functions of the department; responds to informational requests, including those of a highly sensitive nature; typically supervises and trains clerical, technical, and professional staff; may coordinate and direct complex financial or operational activities; acts as executive assistant and provide administrative analysis to high-level managers or department head; assists management in coordinating and/or negotiating complex administrative, organizational, policy, budget, fiscal, and other issues related to important functions of assigned department with outside departments, agencies and organizations; may represent the department to the Mayor's Office, Board of Supervisors, Controller's Office, other City

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officials, outside agencies or the general public.

2. Directs analytical staff and/or researches, analyzes and makes policy recommendations on a variety of difficult, complex special projects and highly visible budget, fiscal, policy, program, organizational and related issues; collaborates with senior managers and other individuals/experts to clarify needs, issues and parameters; directs and/or conducts the development and execution of complex and comprehensive surveys, studies and other processes to analyze data and information from multiple sources; directs and/or conducts research and evaluation of complex data/information from internet, databases and other sources, consultation with subject matter experts, development of complex evaluative processes, creation of spreadsheets, documentation of findings, analysis of alternatives and formulation of recommendations; directs and/or conducts difficult and complex analyses, such as revenue/expense analysis, cost/benefit analysis, needs analysis, trend analysis, variance analysis, net present value analysis, rate and modeling analysis, statistical analysis, program analysis, organizational analysis and legislative/policy analysis; prepares and/or directs the preparation of clear, comprehensive management reports, including logical and coherent financial/policy recommendations and appropriate supporting documentation; presents reports, findings and recommendations to senior management staff, including formal presentations to groups.

3. Analyzes and evaluates the effect of highly complex and sensitive existing, newly enacted and proposed legislation, regulations, law, court decisions and/or memoranda of understanding for policy and financial impact on the department; advises management, and directs/prepares and presents formal reports with recommendations on how to comply with existing and proposed legislation, regulations, law, court decisions and/or memoranda of understanding, mitigate adverse action against the department or maximize potential revenues; develops and recommends procedures for Citywide implementation of enacted legislation, regulations, law, court decisions and/or memoranda of understanding; develops comprehensive user manuals to implement legislation, programs and administrative policy; may act as legislative liaison to other departments; assists state and federal legislative staff in drafting legislation; advocates and testifies regarding department's position to legislators, committee and staff.

4. Consults with senior managers and others to define difficult and complex administrative, management, program and organizational issues, policies and procedures that have significant impact on the organization; directs and/or conducts detailed and comprehensive studies, surveys and other evaluative processes to analyze existing and proposed administrative, management, program and organizational needs, systems, functions, policies and procedures; identifies and analyzes important issues, processes, patterns and trends, makes related projections, documents findings, and develops recommendations; prepares and/or directs the preparation of reports for senior management outlining findings; presents reports to senior management, including recommendations for development of policy; coordinates implementation and evaluation of new systems, policies and procedures.

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5. Directs and/or conducts difficult, complex and comprehensive analyses to evaluate existing and proposed programs; collaborates with senior management, outside experts and others to clarify overall mission, goals, problems and issues; develops and analyzes performance outcome measures to evaluate new programs and related policies; develops and recommends policies, procedures and work processes for new programs; prepares and/or directs the preparation of reports for senior management outlining findings and presenting recommendations; coordinates implementation and ongoing evaluation of new programs.

6. Directs and/or conducts difficult and complex financial, fiscal and/or economic analyses to evaluate the overall fiscal/financial condition of a department/program and provide information/data for financial reporting, projection and planning; directs and/or conducts difficult and complex economic and/or financial analyses, including forecasting, revenue and/or expense projections, rate analysis, statistical analysis, modeling and cost/benefit analysis; evaluates current financial procedures, interprets governmental accounting pronouncements and technical guidance, makes recommendations, and develops and implements new policies and procedures; prepares and/or directs the preparation of financial statements and reports, with policy recommendations and appropriate documentation, for management, Mayor's Office, Board of Supervisors, Controllers Office and various funding agencies; directs and/or conducts difficult and complex analyses for calculation of debt capacity and evaluation of financing alternatives; directs and/or conducts difficult and complex analyses related to determination of capital requirements and capital planning; may coordinate and oversee the annual financial audit, including preparation of audit schedules, governmental accounting standards, and relevant local, state and federal regulations.

7. Directs and/or conducts difficult and complex analyses to advise management in budget development, administration, monitoring and reporting; directs and/or conducts difficult and complex revenue/expense, trend and statistical analyses for budget monitoring, projection and reporting; develops guidelines and prepares or directs the preparation of budget line-item narratives, analyses, recommendations and justifications for annual, supplemental and multi-year requests; develops, coordinates, administers and monitors a highly complex departmental budget with multiple funding sources; negotiates budget proposals within the department and with the Mayor's Office, Board of Supervisors and other agencies; prepares and/or directs the preparation of financial and statistical reports for the Mayor's Office, Board of Supervisors and/or senior department managers; prepares and/or directs the preparation of background information and documentation in preparation for producing reports and/or presentations.

8. Establishes, administers, monitors, coordinates and acts as liaison regarding application for and management of complex, multiple-source capital projects and/or grants; directs and/or conducts monitoring for compliance with funding, legal, service and other requirements; directs and/or conducts monitoring of detailed and complex grant budgets,

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ensures expenditures remain within the budget, shifts funds within guidelines; prepares and/or directs preparation of status/financial/statistical reports for management, Mayor's Office, Board of Supervisors, Controller's Office and other agencies; directs and/or conducts analysis and preparation of departmental reports to funding agencies, including subvention of funds to contracting organizations; ensures provision of technical assistance and oversight to recipients of grants awarded by the department/agency; may coordinate preparation of City-wide single audit report.

9. Directs and/or conducts difficult and complex analyses for developing, processing and administering highly-complex contractual agreements with multiple funding sources; confers with senior management regarding preparation of cost estimates, specifications and terms for new and existing contractual agreements; directs and/or conducts competitive solicitation, review and selection processes, including receipt and review of bids, negotiation with potential contractors/vendors, and review/processing of approvals; directs and/or conducts negotiations with contractors with regard to additional contract terms, cost reimbursement and change order provisions; directs and/or conducts review and preparation of cost estimates and terms for proposed change orders and modifications; directs and/or reviews new and/or existing contract provisions, conducts site visits,

and meets with engineers, inspectors and/or program managers; coordinates with staff from other departments and agencies, and provides technical assistance to staff and contractors on departmental contracting policies, procedures and requirements; develops procedures to review and implement local/state code requirements; directs and/or conducts difficult and complex analysis for monitoring and enforcement of contractual agreements to ensure compliance, including development of computerized systems to track contract status; prepares and/or directs preparation of contract status reports.

10. Performs related duties as required

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of : the principles, procedures, standards and law related to government management and operations that are required to provide professional-level analytical assistance to management staff in such areas as: the development and administration of the annual budget; financial/fiscal and economic analysis and reporting; grant monitoring and administration; development of complex contracting systems and administration of complex contractual agreements; development and evaluation of important administrative/management systems, functions, policy and procedures; evaluation of the impact of existing, newly enacted and proposed legislation, regulations, law, court decisions and memoranda of understanding; and/or major program evaluation and planning.

Ability to: collect, synthesize, and analyze a wide variety of information; conduct difficult analytical studies involving complex administrative and financial systems and procedures; work with authority to identify and define problems, determine methodology, evaluate data, make recommendations with appropriate justification and develop/implement a plan of

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action; effectively prioritize and organize multiple assignments and projects; exercise sound judgment; coordinate work/projects with other programs and departments; establish and maintain effective working relationships with staff, senior management, representatives of other departments/agencies, officials, contractors and the general public; negotiate effectively; speak clearly and concisely to communicate work-related information in a manner that is understandable to the intended audience; listen and effectively elicit information; prepare clear, accurate, effective, well-organized and understandable written documents and management reports; use a computer to research, access, extract and process data and information; create and maintain records; and prepare correspondence, reports and other documentation, including statistical data; assign, train, direct and monitor the work of assigned staff

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

1. Possession of a graduate degree (Master's degree or higher) from an accredited college or university, and five (5) years full-time equivalent experience performing professional-level analytical work as described in Note A; OR
2. Possession of a graduate degree (Master's degree or higher) from an accredited college or university with major college coursework as described in Note B, and four (4) years full-time equivalent experience performing professional-level analytical work as described in Note A; OR
3. Possession of a baccalaureate degree from an accredited college or university, and six (6) years full-time equivalent experience performing professional-level analytical work as described in Note A; OR
4. Possession of a baccalaureate degree from an accredited college or university with major college coursework as described in Note B, and five (5) years full-time-equivalent experience performing professional-level analytical work as described in Note A;

SUBSTITUTION: Applicants may substitute up to 2 years of the required education with additional qualifying experience in budget analysis, financial analysis and reporting, legislative/policy analysis, or contract/grant administration. One year (2000 hours) of additional qualifying experience will be considered equivalent to 30 semester units/45 quarter units.

Notes on Qualifying Experience and Education:

- A. Qualifying professional-level analytical experience must be in one or more of the following

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functional areas: complex budget analysis, development and administration; complex financial/fiscal analysis and reporting; development of complex contracting systems and administration of competitive bid processes and complex contractual agreements; development and evaluation of complex management/administrative policy; complex grant administration and monitoring; complex program evaluation and planning; complex legislative analysis; complex economic analysis; or other functional areas related to the duties of positions in Class 1824, where the primary focus of the job is complex professional-level analysis for evaluation, recommendation, development and implementation of major programs and functions of department/organization. Analytical experience equivalent to the duties of Class 1823 is considered qualifying.

B. Coursework applicable to a baccalaureate or higher degree in specialized subject matter areas such as public or business administration, management, business law, contract law, public policy, urban studies, economics, statistical analysis, finance, accounting or other fields of study closely related to the essential functions of positions in Class 1824

LICENSE AND CERTIFICATION

None

PROMOTIVE LINES

To: 1825 Principal Administrative Analyst II

From: 1823 Senior Administrative Analyst

ORIGINATION DATE: 1/21/61

AMENDED DATE: 2/5/79; 11/4/91; 12/13/94; 11/7/95; 12/2/99; 02/23/2007, 9/28/09

REASON FOR AMENDMENT *To accurately reflect the minimum qualifications defined in the most recent job analysis conducted for this job code.*

BUSINESS UNIT(S): COMMN, SFMTA

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**Title: Senior Administrative Analyst
Job Code: 1823**

INTRODUCTION

Under general direction plans, organizes, leads and/or participates in complex, sensitive, and detailed analytical work in the areas of budget, financial/fiscal, economic, legislative and administrative policy and/or contract administration.

DISTINGUISHING FEATURES

Class 1823 Senior Administrative Analyst is the Senior journey level in the Administrative Analyst series with responsibility for directing and performing difficult, complex, and/or sensitive projects for departmental management. This class is distinguished from class 1822 Administrative Analyst in that class 1822 is the journey-level class working under general supervision. Class 1823 is distinguished from class 1824 Principal Administrative Analyst in that class 1824 has greater and/or more complex financial responsibilities, greater consequence of error and independence of action, and is assigned the most difficult, complex, and sensitive projects.

Supervision Exercised:

Class 1823 Senior Administrative Analysts may supervise a small staff performing moderately complex analytical work.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Researches, analyzes and makes policy recommendation on special projects or highly visible public issues; may direct complex financial or operational activities; responds to informational requests, including those of a highly sensitive nature, and may represent the department to the Mayor's office, Board of Supervisors, Controller's Office, other city officials, outside agencies and the public; acts as executive assistant and provides administrative analysis to high-level managers or a department head.
2. Coordinates, develops, manages and monitors a departmental budget of moderate complexity or assists in the development and management of a departmental budget of greater complexity; negotiates budget proposals within the department and with the Mayor's Office, Board of Supervisors and other agencies; prepares budget line item narrative, analyses, recommendations, and justifications for annual and supplemental requests; assists management in the budget development process, monitoring of the budget, budget reporting, and interpretation of budget-related documents.
3. Analyzes trends in budget expenditures and revenues, prepares financial/statistical reports for management, Mayor's Office, Board of Supervisors, Controller's Office and various funding agencies; coordinates and monitors departmental reporting to funding agencies including the subvention of funds to contracting organizations and justifies that funds are used as required.
4. Coordinates the activities related to the application for, and management of multiple source capital projects and/or grants; monitors detailed and complex budgets, ensures

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expenditures remain within budget, and shifts funds within guidelines; coordinates and monitors reporting to funding agencies including the subvention of funds to contracting organizations and justifies that funds are used as required; may coordinate the preparation of City-wide single audit report.

5. Plans and performs economic and/or financial analyses including forecasting, revenue and/or expense projections, analysis of capital requirements, calculation of debt capacity, evaluation of financing alternatives; rate analysis, modeling and cost/benefit analysis; prepares reports with financial/policy recommendations and appropriate supporting documentation; may assist in the preparation of audit schedules and financial statements.

6. Analyzes and interprets existing, newly enacted and proposed local, state, federal legislation and regulation for policy and financial impact on the department; advises management and prepares recommendations with appropriate supporting documentation regarding how to comply with new regulations, mitigate adverse action against the department or maximize potential revenues; develops, implements and monitors new and revised reporting systems required by legislation.

7. Analyzes existing and proposed administrative policies and procedures as well as organizational problems; conducts difficult and detailed studies; identifies administrative problems, determines methods of analysis, and identifies trends; prepares and presents reports with recommendations and appropriate justification based on studies and surveys; may coordinate the implementation of new systems and/or procedures.

8. Prepares MBE/WBE and contract status reports; conducts competitive contract vendor selection processes including public bids and requests for proposals, distributes and places advertisements and public notices for contracts; processes moderate to highly complex contracts including advertising for bids/proposals, receipt and review of bids, contract negotiation and award, and routing through signature/documentation process to certification; provides information to staff from Purchasing, Human Resources, Human Rights Commission and the Administrative Services Office; and provides training and technical assistance to staff and contractors on departmental and City contracting policies, procedures and requirements.

9. Prepares cost estimates and terms for new and existing contracts, for proposed change orders and modifications; reviews contract provisions, conducts site visits, and meets with engineers/inspectors/program managers to develop cost estimates; meets with contractors to negotiate requests for additional costs; assists in analyzing costs related to change orders and modifications; maintains data and information resources on current industry cost standards for materials, equipment and labor costs; establishes and maintains contact with sources of information including vendors, labor unions and governmental agencies.

10. Performs related duties and responsibilities as assigned

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: the principles and techniques of governmental organization and management; the principles and techniques of financial/fiscal analysis and budgeting; the principles and techniques of economic and policy analysis; the principles and techniques of generally accepted accounting principles and government accounting standards; application

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of statistical and other analytical methods; applicable local, state, and federal laws and regulations affecting departmental operations; principles involved in the development and implementation of complex systems and procedures; methods, procedures, and techniques needed for negotiations of contract terms, change orders, cost estimates and modifications.

Ability to: collect, synthesize, and analyze a wide variety of information; conduct difficult analytical studies involving complex administrative and financial systems and procedures; work with authority to identify and define problems, determine methodology, evaluate data, make recommendations with appropriate justification and develop/implement a plan of action; assign and direct the work of subordinates; establish and maintain effective communication with senior management, officials, departmental representatives, vendors, or other agencies; negotiate effectively; use a personal computer and software programs as utilized in various departments.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

1. Possession of a graduate degree (Master's degree or higher) from an accredited college or university and three (3) years of full-time equivalent experience performing professional level analytical work as described in Note A: OR
2. Possession of a graduate degree (Master's degree or higher) from an accredited college or university with major college coursework as described in Note B and two (2) years full-time equivalent experience performing professional level analytical work as described in Note A; OR
3. Possession of a baccalaureate degree from an accredited college or university and four (4) years full-time equivalent experience performing professional level analytical work as described in Note A; OR
4. Possession of a baccalaureate degree from an accredited college or university with major college coursework as described in Note B and three (3) years full-time equivalent performing professional level analytical work as described in Note A

SUBSTITUTION: Applicants may substitute up to 2 years of the required education with additional qualifying experience in budget analysis, financial analysis and reporting, legislative/policy analysis, or contract/grant administration. One year (2000 hours) of additional qualifying experience will be considered equivalent to 30 semester units/45 quarter units.

Notes on Qualifying Experience and Education:

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A. Qualifying professional-level analytical experience must be in one or more of the following functional areas: complex budget analysis, development and administration; complex financial/fiscal analysis and reporting; development of complex contracting systems and administration of competitive bid processes and complex contractual agreements; development and evaluation of complex management/administrative policy; complex grant administration and monitoring; complex program evaluation and planning; complex legislative analysis; complex economic analysis; or other functional areas related to the duties of positions in Class 1823, where the primary focus of the job is complex professional-level analysis for evaluation, recommendation, development and implementation of major programs and functions of department/organization. Analytical experience equivalent to the duties of Class 1822 is considered qualifying.

B. Coursework applicable to a baccalaureate or higher degree in specialized subject matter areas such as public or business administration, management, business law, contract law, public policy, urban studies, economics, statistical analysis, finance, accounting or other fields of study closely related to the essential functions of positions in Class 1823.

LICENSE AND CERTIFICATION

None

PROMOTIVE LINES

To: 1824 Principal Administrative Analyst

From: 1822 Administrative Analyst

ORIGINATION DATE: 8/26/65

AMENDED DATE: 11/4/91; 11/7/95; 12/2/99, 9/28/09

REASON FOR AMENDMENT *To accurately reflect the current minimum qualifications defined in the most recent job analysis conducted for this job code.*

BUSINESS UNIT(S): COMMN, SFMTA

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**Title: Administrative Analyst
Job Code: 1822**

INTRODUCTION

Under direction, the Administrative Analyst performs difficult and detailed professional-level analytical work in a variety of functional areas, such as; development and administration of competitive bid processes and contractual agreements; grant administration and monitoring; budget development and administration; legislative analysis; development and evaluation of management/administrative policy; program evaluation and planning; or complex financial/fiscal analysis and reporting.

DISTINGUISHING FEATURES

Class 1822 Administrative Analyst is distinguished from Class 1823 Senior Administrative Analyst in that the latter performs duties of a more difficult and complex nature. Class 1822 Administrative Analyst is distinguished from Class 1820 Junior Administrative Analyst in that the latter is an entry level class performing less difficult and complex duties.

Supervision Exercised: Depending on assignment, may serve as lead worker to clerical, technical staff and/or subordinate professional staff.

MAJOR, IMPORTANT, AND ESSENTIAL DUTIES

According to Civil Service Commission Rule 109, the duties specified below are representative of the range of duties assigned to this job code/class and are not intended to be an inclusive list.

1. Performs research, compiles and analyzes information/data regarding a variety of administrative, management, fiscal and organizational issues: identifies issues and determines analytical standards in consultation with supervisor, manager, departmental personnel and other individuals/experts; gathers relevant data, information and/or documentation from a variety of sources; analyzes information and documentation and develops tentative findings; discusses and/or coordinates analysis and tentative findings with supervisor, management staff and/or other appropriate individuals; develops or assists in developing recommendations and/or course of action; gathers additional information and/or revises methodology as needed.
2. Prepares or assists in the preparation of a variety of management reports: compiles and evaluates information in preparation for writing report; presents background information and description of analytical standards; outlines findings and recommendations and prepares logical supporting documentation; writes or assists in writing final reports and documentation for evaluation by administrative and/or management staff; presents reports, including formal presentations to groups.
3. Performs analysis for development of administrative, management, program and organizational policies and procedures: consults with managers, administrators and other staff to determine parameters for analysis and other background information; analyzes existing policies, procedures and work practices; analyzes the effect of proposed and existing legislation, regulations and law on organizational policies and procedures; compiles

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information and documentation in preparation for producing reports and/or drafts reports for management/administration.

4. Performs analysis for budget development and resource planning: performs or assists in needs analysis and trend analysis based on research and consultation with managers and administrative staff; consults with managers and assists in resource planning and development of annual budget estimates; reviews and analyzes budget requests from administrators; compiles information and documentation in preparation for producing reports and/or drafts reports related to budget and resource planning issues.

5. Performs analysis for budget administration and/or fiscal/financial reporting: monitors and analyzes expenditures and accounts to ensure compliance with budget parameters; gathers information and prepares documentation related to fiscal/financial reporting; performs and/or assists in fiscal/financial analysis; compiles information and documentation in preparation for producing and/or drafts fiscal/financial reports.

6. Performs analysis for development and administration of competitive bid processes and contractual agreements: identifies and analyzes needs, goals, available funding and other criteria; develops or assists in development of contract/lease specifications; preparing requests for proposals and bid solicitation; performs or assists in analysis of bid information provided by contractors; assists in establishment/maintenance of contractual relationships; performs or assists in analysis for monitoring and enforcement of legal agreements to ensure compliance.

7. Performs analysis for monitoring of grants received by department; writes or assists in writing grant proposals; analyzes funding parameters and other requirements specified by grantor; monitors departmental expenditures to ensure funding parameters are met; analyzes other criteria to ensure compliance with standards required by grantor.

8. Performs related duties as required

IMPORTANT AND ESSENTIAL KNOWLEDGES, SKILLS, AND ABILITIES

Knowledge of: the principles, procedures and legal standards required to provide professional-level analytical assistance to administrative staff in such areas as: budget development and monitoring; financial/fiscal analysis and reporting; development of management/administrative policies and procedures; analysis of existing and proposed legislation, legal standards and regulatory mandates; development and administration of contractual agreements; and/or grant monitoring and administration.

Ability to: identify, research and gather relevant information from a variety of sources; read and interpret complex written materials; analyze and evaluate data, procedures, interrelated processes and other information; formulate conclusions and/or alternatives and develop effective recommendations; use work-related computer applications, including e-mail, word processing, spreadsheets, databases and the internet; prepare well-organized and accurate documents such as reports, memos, and correspondence; synthesize ideas and factual information into clear and logical written statements; speak clearly and concisely in order to express ideas and communicate work-related information to a variety of individuals and groups; listen, ask appropriate questions and effectively elicit information; establish and

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maintain effective working relationships with staff, officials and the general public, including a variety of individuals and groups.

MINIMUM QUALIFICATIONS

These minimum qualifications are to be used as a guide for establishing the education, training, experience, special skills and/or license which may be required for employment in the class. Although these minimum qualifications are typical of the class, additional minimum qualifications and special conditions may apply to a particular position and will be stated on the job announcement.

1. Possession of a graduate degree (Master's degree or higher) from an accredited college or university; and one (1) year full-time equivalent experience performing professional-level analytical work, as described in Note A; OR.
2. Possession of a graduate degree (Master's degree or higher) from an accredited college or university with major coursework as described in Note B; OR.
3. Possession of a baccalaureate degree from an accredited college or university, and two (2) years full-time equivalent experience performing professional-level analytical work as described in Note A; OR
4. Possession of a baccalaureate degree from an accredited college or university with major coursework as described in Note B and one (1) year full-time equivalent experience performing professional-level analytical work as described in Note A;

SUBSTITUTION: Applicants may substitute up to 2 years of the required education with additional qualifying experience in budget analysis, financial analysis and reporting, legislative/policy analysis, or contract/grant administration. One year (2000 hours) of additional qualifying experience will be considered equivalent to 30 semester units/45 quarter units.

Notes on Qualifying Experience and Education:

A. Qualifying professional-level analytical experience must be in one or more of the following functional areas: complex budget analysis, development and administration; complex financial/fiscal analysis and reporting; development of complex contracting systems and administration of competitive bid processes and complex contractual agreements; development and evaluation of complex management/administrative policy; complex grant administration and monitoring; complex program evaluation and planning; complex legislative analysis; complex economic analysis; or other functional areas related to the duties of positions in Class 1822, where the primary focus of the job is complex professional-level analysis for evaluation, recommendation, development and implementation of major programs and functions of department/organization. Analytical experience equivalent to the duties of Class 1820 is considered qualifying.

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B. Coursework applicable to a baccalaureate or higher degree in specialized subject matter areas such as public or business administration, management, business law, contract law, public policy, urban studies, economics, statistical analysis, finance, accounting or other fields of study closely related to the essential functions of positions in Class 1822.

LICENSE AND CERTIFICATION

None

PROMOTIVE LINES

To: 1823 Senior Administrative Analyst

From: 1820 Junior Administrative Analyst

ORIGINATION DATE: July 13, 1961

AMENDED DATE: Amended: July 23, 1999, April 2, 2001, September 28, 2009

REASON FOR AMENDMENT *To accurately reflect the current minimum qualifications defined in the most recent job analysis conducted for this job code.*

BUSINESS UNIT(S): COMMN, SFMTA