

Senior Fiscal Analyst

JOB FAMILY DEFINITION

This classification falls within the Fiscal Analysis Job Family encompassing a range of work in which incumbents are responsible for providing analysis, oversight, and reporting for the finance, accounting, budget, revenue and collections, trust and treasury, and procurement (such as contracting) functions of the Judicial Council and on behalf of client courts. This class specification represents the type and level of work performed recognizing that specific work assignments may differ from one unit to another and from one incumbent to another.

CLASS SUMMARY

Incumbents, as assigned, are responsible for providing advanced journey-level professional work as a designated subject matter expert for analysis, reporting, and oversight of the finance, accounting (such as general ledger), budget, revenue and collections, trust and treasury, and procurement functions of the Judicial Council and on behalf of client courts.

The Senior Fiscal Analyst is designated by the organization for routinely performing assignments requiring the application of the highest level of analytical, subject matter, and organizational expertise (immediately below the level of supervisor). This includes, but is not limited to, preparing or reviewing information or templates and/or providing advanced strategic consultation that direct or guide the work of other staff including Fiscal Analysts as well as in-depth knowledge of large, complex budget and financial transaction methods and strategies, financial analysis, and/or professional service solicitation and contract-related activities.

DISTINGUISHING CHARACTERISTICS

The Senior Fiscal Analyst is distinguished from the Fiscal Analyst in that the Fiscal Analyst performs work that is narrower in scope (as an example, a Fiscal Analyst would not prepare the branch-wide personnel services budget templates, or coordinate organization and branch-wide month-end and year-end close, or allocate retirement costs branch-wide, or direct the investment of branch-wide pooled funds).

A Senior Fiscal Analyst is considered a subject matter expert by the organization and is assigned responsibility for performing assignments requiring the highest level of analytical, subject matter, and organizational expertise (immediately below the level of supervisor), and includes preparing information or templates and providing advanced strategic consultation that direct or guide the work of other staff including Fiscal Analysts. The Senior Fiscal Analyst also assists management with implementing a unit's goals, objectives, policies, procedures, work standards, and internal controls. Work requires the consistent exercise of discretion and judgment, using advanced knowledge, to analyze and interpret information and make recommendations.

The Senior Fiscal Analyst is distinguished from the Fiscal Supervisor in that the latter supervises three or more Judicial Council staff, including a minimum of two exempt-level staff, and may supervise other staff as assigned.

EXAMPLES OF ESSENTIAL DUTIES *(The duties listed are illustrative only and represent the core areas of responsibilities; specific position assignments will vary depending on business needs.)*

- Serves as subject matter expert performing work such as, but not limited to, assisting with the implementation of goals, objectives, policies, procedures, work standards, and internal controls; providing advice and consultation in areas of expert knowledge, as assigned.
- Coordinates organization and branch-wide month-end and year-end close; monitors and manages branch-wide cash flows, liquidity, and investing.
- Develops organization, trial court, and branch-wide templates used by other staff including Fiscal Analysts to develop, manage, and report budgets and other financial information.
- Designs, implements, reports, and enhances the Comprehensive Collections Programs for the most complex counties/courts; provides subject matter expertise and advanced consultation to other analysts on best practices, program reporting templates, creating and enhancing performance measures, and benchmarks.
- Establishes data requirements and represents the unit for consultation on issues relating to the reporting and accounting of financial data for the trial courts as well as related systems upgrade and implementation.
- Provides advanced professional accounting, budgeting, investment, or formal professional services solicitation and contract drafting/negotiating advice and guidance to internal staff and customers, as assigned.
- Performs long term budgetary fund analysis for multiple, complex funds and/or statewide analysis for costs across all fund sources; establishes procedures and templates for tracking and forecasting revenues, expenditures, and financial data reporting; prepares cost allocations for major organization-wide funds, revenue, and expenditure categories such as personnel costs, major capital outlay expenditures, and indirect costs.
- Coordinates and leads complex financial projects or formal procurement solicitations, as assigned.
- Researches industry standards, best practices, and emerging laws and regulations.
- Provides training to internal and/or external clients in assigned area.
- Provides orientation and guidance to new and existing staff, as assigned.
- Performs other duties of a similar nature and level as assigned.

EXAMPLES OF POSITION SPECIFIC RESPONSIBILITIES *(Illustrative Only)*

Positions assigned to budget may be responsible for:

- Preparing and testing budget templates and worksheets to be used by trial/appellate courts, other analysts and unit staff; writing instructions and conducting training;
- Handling the most complex offices and programs with multiple revenue sources, grants and diversity of work;
- Preparing and conducting complex organization-wide and/or multiple, complex fund conditions and revenues analysis and multi-year forecasting;
- Analyzing and preparing complex BCPs, reports and statements for the Governor's Budget; and
- Preparing Judicial Council financial and other reports required by and submitted to the legislature and other external bodies and making presentations.

Positions assigned to the trust and treasury may be responsible for:

- Coordinating and managing cash and investments from statewide pooled accounts;
- Monitoring investment performance and recommending investment choices;
- Reviewing and approving pooled money market fund investment allocations;
- Coordinating banking services;
- Traveling to courts to provide accounting assistance and business process review; and

- Providing strategic subject matter expertise and consultation to other staff and client courts on complex accounting issues.

Positions assigned to accounting (general ledger) may be responsible for:

- Directing and coordinating organization-wide account reporting such as month-end or year-end close;
- Reviewing the work of other Fiscal Analysts to ensure that financial books are fully GAAP/GASB compliant;
- Researching accounting guidelines and procedures for complex financial issues, making recommendations and providing strategic consultation and recommendations to customers;
- Reviewing and approving financial transactions such as, but not limited to, journal entries; and
- Preparing complex reports for management, the Executive Office, and the Judicial Council.

Positions assigned to contracting may be responsible for:

- Drafting, issuing, and terminating the most complex contracts, amendments, and work orders;
- Drafting and administering complex solicitations;
- Providing guidance to other analysts in addressing merits of protests;
- Advising project managers and key stakeholders on contract development, solicitations, and policy related to contracting;
- Training and interviewing key stakeholders to determine project goals, scope of work, and appropriate contract language for complex services contracts; and
- Providing consultation to Judicial Council staff, managers, and clients.

MINIMUM QUALIFICATIONS

EDUCATION AND EXPERIENCE

Bachelor's degree, preferably in business, finance, accounting or a directly related field, and four (4) years of professional experience in accounting, financial analysis, budgetary, or contract administration/procurement.

Possession of a bachelor's degree in a directly related field such as accounting, finance, business, etc., may be substituted for one of the years of required experience. *An additional four years of professional experience in the assigned function as noted above may substitute for the bachelor's degree. Or, additional directly related experience and/or education may be substituted on a year-for-year basis.*

OR

Juris doctor, master's of business administration, or master's degree in a directly related field for the assigned discipline such as finance, contract administration or accountancy, and one (1) year of experience as identified above.

OR

One year as a Fiscal Analyst, in the assigned field, with the Judicial Council of California or one year of experience performing the duties of a class comparable in the level of responsibility to that of a Fiscal Analyst in a California Superior Court or California state-level government entity.

LICENSING AND CERTIFICATIONS

- None

KNOWLEDGE OF

- Applicable federal, state, and local laws, codes, regulations, and/or ordinances;
- Principles, practices, and methods of budgeting and finance, as assigned;
- Principles, practices, and methods of fund and governmental accounting, as assigned;
- Principles and practices, of contract preparation, negotiation, and management, as assigned;
- Advanced internal control concepts;
- Advanced Generally Accepted Accounting Principles (GAAP) and Governmental Accounting Standards Board (GASB), as assigned;
- Banking and investments, as assigned;
- Organizational and statewide structure and processes for professional service solicitations, contract administration, budgeting, accounting, or cash management, as assigned;
- Financial system operability as it relates to the gathering, analysis, and dissemination of organization-wide information;
- Best practices and emerging laws and regulations in assigned field;
- Principles and methods of financial statistical analysis;
- Advanced business mathematical concepts;
- Principles and techniques of preparing effective oral presentations and written materials;
- Strategic business consultation and advanced subject matter expertise of the assigned area;
- Applicable work rules and policies; and
- Applicable business equipment and desktop applications.

SKILL IN

- Preparing complex reports, templates, and other financial documents;
- Developing, delivering, and facilitating presentations;
- Interpreting, applying, and explaining applicable laws, codes, regulations, and standards;
- Exercising political acumen, tact, and diplomacy;
- Providing strategic financial consulting, recommendations, and training;
- Planning, developing, and managing budgets, as assigned;
- Using computerized financial systems to gather, analyze, and disseminate organization-wide financial information, worksheets, templates, etc.;
- Reviewing complex financial documents including, but not limited to, contracts, agreements, purchase orders, budget requests, investment records, and ledgers, for completeness and accuracy;
- Monitoring expenditures, revenues, and/or cash position;
- Researching, compiling, reviewing, analyzing, summarizing, and synthesizing financial information;
- Applying financial tools such as forecasting and cost/benefit analysis;
- Organizing and coordinating activities and processes, meeting deadlines, and prioritizing competing demands within assignments;
- Utilizing a computer, relevant software applications, and/or other equipment as assigned;
- Effectively communicating; and
- Maintaining effective working relationships with colleagues, customers, and the public.

WORKING CONDITIONS, ADA AND OTHER REQUIREMENTS

The Judicial Council is an equal opportunity employer. The Judicial Council will comply with its obligations under the law to provide equal employment opportunities to qualified individuals with disabilities.

Positions in this class typically require: sitting, walking, reaching, standing, grasping, pushing, pulling, lifting, fingering, kneeling, crouching, stooping, seeing, hearing, talking, and repetitive motions.

Light Work: Exerting up to 20 pounds of force occasionally, and/or up to 10 pounds of force frequently, and/or a negligible amount of force constantly to move objects. If the use of arm and/or leg controls requires exertion of forces greater than that for Sedentary Work and the worker sits most of the time, the job is rated for Light Work.

Incumbents generally work in a typical office environment with adequate light and temperature. The Judicial Council will make all reasonable efforts to minimize the need for employees to travel by taking advantage of virtual conferencing tools as much as possible. However, positions in this class may require local and statewide travel as necessary.

Please Note: *The Judicial Council classifies work based on organizational need. The distinguishing characteristics, essential duties and minimum qualifications described in this specification relate to the body of work required and not to the attributes of an incumbent assigned to perform the work.*