

PRINCIPAL STAFF ANALYST

This class specification indicates, in general terms, the type and level of work performed as well as the responsibilities of employees in this classification. The job functions described are not to be interpreted as being all-inclusive to any specific employee.

DEFINITION

Under general direction, develops, implements, and manages the most complex analytical, financial analyses and administrative duties in support of assigned OC San programs and operations that have an impact on OC San-wide services and operation, including but not limited to budget analysis, financial trend and forecasting analysis, cost accounting studies, management and program analysis, contract management, and project management; designs and conducts complex investigative research, compiles and analyzes data from various sources, and makes appropriate recommendations based on analysis; prepares various reports to improve the efficiency and effectiveness of operations; works closely with OC San's management staff in providing professional and technical expertise and advice; provides functional and technical direction to lower-level staff; and performs duties as assigned.

SUPERVISION RECEIVED AND EXERCISED

Receives general direction from the assigned supervisory and/or managerial staff. Exercises no direct supervision of staff. Exercises technical and functional direction over and provides training to lower-level staff.

CLASS CHARACTERISTICS

This classification is the third of three levels within the analyst job series responsible for performing the most difficult and responsible assignments, projects, analyses, and programs assigned requiring advanced knowledge of the concepts, practices, procedures, and policies of OC San. Positions at this level provide technical and functional direction and leadership to assigned staff. Assignments at this level have significant impact on OC San's operations. Completed work is reviewed only from an overall standpoint in terms of feasibility, compatibility with other work, and/or effectiveness in meeting requirements and expected results. This class is distinguished from supervisory or management classifications in that the latter are responsible for planning, organizing, and coordinating all programs, projects, and activities of a major work section or division and for the full supervision of assigned professional, technical, and administrative support staff.

EXAMPLES OF ESSENTIAL JOB FUNCTIONS (Illustrative Only)

The following essential job functions are typical for this classification. Incumbents may not perform all of the listed job functions and/or may be required to perform additional or different job functions from those set forth below to address business needs and changing business practices.

- Serves as an expert and/or internal consultant to management regarding large, complex, and/or multi-disciplinary research, projects, studies, and initiatives in support of assigned OC San programs and operations; provides guidance and expert level advice relative to area(s) of assignment.
- Develops and implements goals, objectives, policies, and priorities for assigned functions and program areas; researches, implements, and administers policies, procedures, and changing business practices

- and processes for assigned area.
- Evaluates and monitors service delivery and communicates findings to management; implements changes to improve efficiency and service quality; maximizes effectiveness of program and operations and ensures alignment with OC San goals and objectives.
 - Conducts studies of new and existing programs and services; researches and conducts budget, financial, and feasibility analyses, develop goals, objectives, performance metrics, and implementation and evaluation plans, mitigate problems, and increase efficiencies; consults with OC San personnel and outside agencies; develops new policies and procedures; leads implementation and monitors activities.
 - Designs and conducts a variety of complex analytical and operational studies and investigative research projects regarding programs and functions; selects, adapts, and applies appropriate analytical, research, and statistical techniques; consults with all levels of OC San personnel and outside agencies; evaluates alternatives and makes recommendations; participates in the development and measurement of industry benchmarks and best practices; discusses, consults with, and advises staff and management on recommendations; reviews and evaluates implemented changes.
 - Provides professional assistance in resolving complex operational and administrative problems; identifies problem areas and issues; conducts research to find alternative solutions; makes recommendations; assists in implementation of recommendations.
 - Independently prepares complex administrative, operational, and financial reports including the preparation of conclusions, recommendations, and forecasts based on data analysis and findings; consults with OC San staff, outside agencies, and associations to obtain information.
 - Assists management in coordinating the budget process and developing assigned budget by collecting and analyzing budget requests, allocation changes, and historical and current financial data, conducting rate and fee analyses, and preparing preliminary budget estimates; conducts meetings with management to evaluate revenue and expenditure requests and changes and keeps all parties apprised of issues, challenges, and resolution thereof; makes recommendations and obtains final approval for changes; prepares budget reports, analyses, and documents; reviews budget submittals for completeness, accuracy, the appropriate use and reporting of funds, and adherence to OC San policies; monitors revenues and expenditure.
 - Participates on and provides staff support to a variety of committees and boards; prepares and presents staff reports and other correspondence.
 - Manages and coordinates assigned services and project activities with other OC San programs, functions, boards, committees, and task forces, as well as external organizations and agencies and the general public; represents assigned department on committees and task forces to develop, schedule, implement, and monitor programs and projects that impact various OC San departments.
 - Develops and manages requests for proposals for professional and/or contracted services; prepares scope of work; evaluates proposals and recommends award; negotiates and administers contracts; ensures work is performed in compliance with contracts and agreements, OC San standards and industry best practices, and with applicable rules and regulations.
 - Provides leadership and guidance to others on programs and/or projects; as a program and/or project leader, directs, assigns, trains, monitors, and reviews the work activities of team members; determines work priorities; oversees quality and quantity of work performed and ensures adherence to established procedures by instructing employees accordingly; is a resource to employees by possessing specialized skills; and develops and implements work improvements.
 - Attends and participates in professional group meetings; stays abreast of new trends and innovations in the fields of business and public administration and issues related to field of expertise; researches emerging products and enhancements and their applicability to OC San's needs.
 - Ensures safety and health procedures and precautions are adhered to, corrects unsafe work conditions/practices, and/or reports unsafe work conditions/practices to assigned supervisory or managerial staff.
 - Performs duties as assigned.

QUALIFICATIONS

Knowledge of:

- Principles of providing functional direction and training.
- Applicable federal, state, and local laws, codes, and ordinances relevant to the area(s) of responsibility.
- Advanced principles and practices of public administration including the organization, functions, and problems of public agencies.
- Organization and management practices as applied to the development, analysis, and evaluation of programs, policies, and operational needs of the assigned areas of responsibility.
- Principles and practices of program and/or project management including planning, development, implementation, monitoring, and evaluation.
- Advanced research, quantitative and qualitative analyses, mathematical and statistical calculations, and reporting methods, techniques, and procedures.
- Advanced principles and applications of critical thinking and analysis.
- Principles and practices of public agency budget development and administration, contract management, and sound financial management policies and procedures.
- Principles of business letter writing and report preparation.
- Principles and practices of record keeping and records management.
- Recent and on-going developments, current literature, and sources of information related to the operations of the assigned programs or area of analysis.
- Techniques for effectively representing OC San in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
- Principles and techniques for working with groups and fostering effective team interaction to ensure teamwork is conducted smoothly.
- The structure and content of the English language, including the meaning and spelling of words, rules of composition, and grammar.
- Current equipment and communication tools used for business functions and program, project, and task coordination, including computers and software programs relevant to work performed.

Ability to:

- Oversee and administer assigned programs and/or projects and promote the individual professional growth and development of less experienced staff.
- Apply critical thinking and analysis to a broad range of situations and in decision making and problem solving.
- Develop and implement goals, objectives, practices, policies, procedures, and work standards for assigned functions and programs.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques; develop and implement new or enhanced systems, methods, policies, and procedures; monitor program progress in meeting goals and objectives; conduct updates with management staff to inform and advise on program progress; make adjustments as necessary.
- Understand the organization, operation, and services of OC San and of outside agencies as necessary to assume assigned responsibilities.
- Coordinate and oversee programmatic administrative, budgeting, and fiscal reporting activities.
- Design and conduct various organizational, fiscal, and administrative investigative research studies and analyses such as budget analysis, financial trend and forecasting analysis, cost accounting studies, management and program analysis, contract management, and project management.
- Perform advanced quantitative and qualitative analyses, interpret, draw conclusions, and summarize and present information and data in an effective manner.
- Direct the preparation of or prepare clear, concise, and complete analytical, administrative, and financial reports and other written material.

- Make accurate arithmetic, financial, and statistical computations.
- Operate a motor vehicle and travel to various OC San sites, projects, and/or meetings.
- Understand, interpret, and apply all pertinent laws, codes, regulations, policies and procedures, and standards relevant to work performed.
- Effectively represent the department and OC San in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Independently organize work, set priorities, meet critical deadlines, and follow-up on assignments.
- Use tact, initiative, prudence, and independent judgment within general policy and legal guidelines.
- Comply with safe work practices and procedures in the workplace.
- Provide a high level of customer service by effectively dealing with the public, vendors, contractors, and OC San staff.
- Effectively use computer systems, software applications relevant to work performed, and modern business equipment to perform a variety of work tasks.
- Communicate clearly and concisely, both orally and in writing, using appropriate English grammar and syntax.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

Employment Standards:

Any combination of education and experience that provides the required knowledge, skills, and abilities may be qualifying as determined by OC San.

1. Bachelor's degree from a college or university accredited by the U.S. Department of Education, with major coursework in business or public administration or a related field.
2. Five (5) years of increasingly responsible work experience performing research, analysis, and budgetary duties.

Licenses and/or Certifications:

- If assigned to Real Property, must possess a valid California Real Estate Broker's or Salesperson's license.
- If assigned to Real Property, must possess a valid California Class C Driver's License.

Disaster Service Workers:

All Orange County Sanitation District employees are designated Disaster Service Workers through state law (California Government Code Section 3100-3109). Employment with the Orange County Sanitation District requires the affirmation of a loyalty oath to this effect. Employees are required to complete all related training as assigned, and to return to work as ordered in the event of an emergency.

PHYSICAL DEMANDS

- Mobility to work in a standard office setting and use standard office equipment, including a computer; this is primarily a sedentary office classification although standing in work areas and walking between work areas may be required; occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information; ability to lift, carry, push, and pull materials and objects up to 35 pounds.
- Vision to read printed materials and a computer screen.
- Hearing and speech to communicate in person and over the telephone.
- Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment.
- Depending on assignment, the ability to operate a motor vehicle to travel to various OC San sites, projects, and/or meetings.

ENVIRONMENTAL ELEMENTS

- Office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.
- Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.

OTHER REQUIREMENTS

- Probationary Period: All OC San employees, except classifications considered “at-will”, are subject to the probationary period provisions as specified in the applicable Memorandum of Understanding, policies, and/or resolutions. Employees who have not yet successfully completed their initial probationary period serve “at-will” and may be released from employment without cause or recourse to any appeal or grievance procedures.
- Pre-Employment: All employment offers are contingent upon successful completion of OC San’s pre-employment process, which includes a background investigation, a physical examination, and a drug screen.
- Work Location Assignment: Employees will be assigned to a work location based on business needs which may be located at any/all of OC San locations; this work location may be changed at any time.