

**City of San José**  
**CLASS SPECIFICATION**

**Title: Analyst I/II FT/PT (1627/1632/1630/1635)**

<b>DEPARTMENT</b>	<b>ACCOUNTABLE TO</b>	<b>FLSA STATUS</b>
Varies	Varies	Non-exempt

**CLASS SUMMARY**

Under general supervision (Analyst I) or direction (Analyst II), is responsible for professional level analytic work in support of an assigned functional area such as budget, finance, grant administration, organizational analysis, general administration and human resources. Assignment areas may be department specific or may include functions encompassing multiple departments. Conducts studies, analyzes data and prepares conclusions. Coordinates services with other City departments, divisions, outside agencies and private organizations, and the general public. Performs related work as required.

**DISTINGUISHING CHARACTERISTICS**

The Analyst I/II is the flexibly staffed entry/journey class in the Analyst series, described as follows:

Analyst I - This is the entry-level class in the Analyst classification series. This class is responsible for providing support for an assigned operational and/or program area where expertise is gathered in a specific field of work. Positions at this level are not expected to function with the same amount of knowledge or skill level as positions allocated to the Analyst II level and usually exercise less independent discretion and judgment in matters related to work procedures and methods. Work is usually supervised while in progress and fits an established structure or pattern. Exceptions or changes in procedures are explained in detail as they arise. As experience is gained, assignments become more varied and are performed with greater independence.

Analyst II - This is the journey-level class in the Analyst classification series responsible for performing the full range of professional support for an assigned operational and/or program area. Incumbents are expected to work independently and exercise judgment and initiative. Positions at this level receive only occasional instruction or assistance as new or unusual situations arise and are fully aware of the operating procedures and policies of the work unit. Analyst II is distinguished from Analyst I in that they may provide training to an Analyst I and/or clerical staff. This class is distinguished from the Senior Analyst in that the latter class performs the most complex work assigned to the series, including serving as a supervisor over professional staff.

**QUALIFICATIONS**

**Minimum Qualifications**

**Education and Experience**

***Analyst I***

A Bachelor's Degree from an accredited college or university.

***Analyst II***

A Bachelor's Degree from an accredited college or university AND two (2) years of increasingly responsible professional staff analytic or administrative experience conducting studies, organizing and analyzing data, and preparing reports, recommendations, or conclusions for a functional area in budget, finance, grant administration, organizational analysis, general administration, or human resources.

**Acceptable Substitution**

Additional years of experience in a position comparable to the Staff Specialist with the City of San José in areas such as budget, finance, grant administration, organizational analysis, general administration or human resources may be substituted for the education requirement on a year for year basis.

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**Other Qualifications**

**(Incumbents may be required to have different combinations of the listed qualifications, or more specific job-related qualifications depending on the position.)**

**Basic Competencies**

**(Needed at entry into the job in order to perform the essential duties.)**

- Job Expertise - Demonstrates knowledge of and experience with applicable professional/technical principles and practices, Citywide and departmental procedures/policies and federal and state rules and regulations.
- Communication Skills - Effectively conveys information and expresses thoughts and facts clearly, orally and in writing; demonstrates effective use of listening skills and displays openness to other people's ideas and thoughts.
- Computer Skills - Experienced with common business computer applications including but not limited to: MS Outlook, MS Word, MS PowerPoint, MS Access, and MS Excel.
- Teamwork & Interpersonal Skills - Develops effective relationships with co-workers and supervisors by helping others accomplish tasks and using collaboration and conflict resolution skills.
- Analytical Thinking – Approaching a problem or situation by using a logical, systematic, sequential approach.
- Collaboration – Develops networks and builds alliances; engages in cross-functional activities.
- Continuous Improvement - Actively identifies new areas for learning and regularly creates and takes advantage of learning opportunities.
- Customer Service – Demonstrates the ability to anticipate customers' needs and deliver services effectively and efficiently using professional demeanor.
- Decision Making - Identifies and understands issues, problems, and opportunities; uses effective approaches for choosing a course of action or developing appropriate solutions.
- Fiscal Management – Understands the relationship of the budget and resources to the strategic plan; complies with administrative controls over funds, contracts, and procurements.
- Flexibility - Makes effective decisions and achieves desired results in the midst of major changes in responsibilities, work processes, timeframes, performance expectations, organizational culture, or work environment.
- Problem Solving - Approaches a situation or problem by defining the problem or issue; determines the significance of problem; collects information; uses logic and intuition to arrive at decisions or solutions to problems that achieve the desired outcome.
- Reliability – Completes quality work assignments in a timely and efficient manner; fulfills responsibilities and maintains confidentiality as appropriate.

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<b>DUTY NO.</b>	<b>TYPICAL CLASS ESSENTIAL DUTIES:</b> (These duties and estimated frequency are a representative sample; position assignments may vary depending on the business needs of the department.) Duties may include, but are not limited to, the following:	<b>FREQUENCY*</b>
1.	Gathers, organizes, and analyzes data relating to specific assignments which require research from which conclusions can be drawn; prepares analyses and reports with recommendations/options; explains report recommendations and conclusions to customers.	Daily
2.	Obtains data and other information from operating departments through use of questionnaires, personal visit, and otherwise as indicated; assembles, arrays, processes, and analyzes data; prepares studies and reports as indicated; and proposes or suggests appropriate action to supervisor/management.	Daily
3.	Confers with departmental management and others on administrative problems; gathers and analyzes facts about departmental organization, staffing, and work load; evaluates and prepares recommendations on departmental requests for program changes; provides for and assists in the installation of improved systems or organization; and prepares and revises policy and procedures manuals and instructional materials.	Daily
4.	May assist in training less experienced professional staff in work methods and procedures. Acts as a lead/subject matter expert with newer staff who frequently ask questions or ask for direction pertaining to past/best practices.	Daily
5.	Supervises clerical or technical personnel in administrative support functions as assigned. May provide lead direction and training to support staff by assigning, reviewing and providing feedback on tasks.	Daily
6.	As assigned, provides highly technical support in determining the organization, administration, operations, and functions of an operating department or division by developing the organizational unit, identifying lines of authority and supervisory responsibility, and recommending on the number and organizational assignments for all authorized positions in the department.	Daily
7.	As assigned, provides professional support within an assigned human resources program area such as recruitment, selection, classification, compensation, workers compensation, and training; coordinates program services internally and externally, performing administrative and technical tasks to deliver program services.	Daily
8.	As assigned, investigates and attempts to resolve customer complaints and/or inquires.	Daily
9.	As assigned, participates with groups in analyzing and evaluating community conditions and needs; offers guidance and counsel in the establishment of goals and techniques of achievement.	Daily
10.	As assigned, provides support to the City's and department's budget process; reviews budget requests; summarizes findings; assembles and analyzes data; proposes or suggests appropriate actions including reallocation of resources; works with operating departments to facilitate budget proposal preparation and execution of adopted budgets.	Daily

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11.	As assigned, provides professional support within a department's fiscal program; reviews and prepares accounting transactions such as journal vouchers, encumbrance reviews, liquidations, and billings and receivables. May respond to internal and/or external auditors' questions and/or requests as needed. Assists project managers with processing special payroll requests. Assists in, and/or prepares and distributes a variety of fiscal reports and documents.	Daily
12.	As assigned performs grant sourcing, fiscal oversight and administrative tasks; reviews grant proposals and, working both internally and externally, develops applications and work/implementation plans for grant projects; designs and maintains an individual monitoring system for each grant project; participates in the development of grant contracts; negotiates scope, goals, outcome measures and schedules; prepares draft contracts and supporting documentation; monitors grant activities to ensure they remain in scope with terms and conditions for the grant; tracks grant spending to ensure that funds are expended within the grant terms and conditions; prepares and distributes reports on grant operations and activities.	Daily
13.	Performs other related duties as assigned.	As Required

\*Frequency defined as Daily/Several Times, Daily, Weekly, Intermittent, or As Required

**PHYSICAL/ENVIRONMENTAL ELEMENTS**

The following is a general statement for the classification. Individual positions may have additional or different physical/environmental elements.

In an office environment, possess ability to:

- Operate, access, enter, and retrieve data using standard office equipment, including but not limited to a computer or tablet;
- Read printed materials and a computer screen;
- Communicate in person and over the telephone;
- Lift, carry, push, and pull materials and objects up to 25 pounds, or heavier weights, in all cases with the use of proper equipment;
- Move between/within work areas, including but not limited to sitting, walking, and standing on various surfaces, turning, bending, grasping, and making repetitive hand movements;
- Be exposed to moderate noise levels and controlled temperature conditions;
- Maintain professional demeanor during interactions with staff, customers, and the public.

**CLASSIFICATION HISTORY** Created 3/80 & 5/80, (Formerly Analyst I/II & Staff Analyst II), I Rev. 6/89, Rev. 4/90, I Rev. 3/94, Rev. 7/97, Rev. 11/18, Rev. & Retitle 12/18 (Formerly Analyst I/II C), Rev. 03/22; s005