



## BUSINESS ANALYST

### **DEFINITION**

Under the general direction of the Director of Finance, the position of Business Analyst is responsible for the acquisition and compilation of data, analysis of such data, project management, report preparation, and support of various District business systems, procedures and applications; performs technical and professional work in conducting various business analysis and forming recommendations for operational and process improvements; coordinates various analytical and procedural activities with other District staff.

### **SUPERVISION RECEIVED AND EXERCISED**

Receives general supervision from the Director of Finance. Exercises lead direction over Customer Service Representative I's and II's.

### **CLASS CHARACTERISTICS**

Working closely with the Director of Finance, performs duties under general direction and supervision within a framework of established policies and procedures, performs a full range of highly skilled process analysis and system process change recommendation with less supervision, requiring a higher degree of knowledge and competency. Implements, maintains, analyzes, and improves District business systems, applications, and associated programs. Assignments are given, in specific to general terms and are subject to review while in progress and upon completion.

### **EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)**

*Management reserves the right to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations where appropriate so qualified employees can perform the essential functions of the job.*

- Provides responsible professional and technical assistance to the Director of Finance and other members of the administrative management staff.
- Performs and manages data collection, compilation, coordination, organization, evaluation, and database development.
- Conducts research, data analysis, and forms recommendations for operational and administrative programs, business systems, polices, and procedures.
- Provides project, program, administrative, and analytical support to an assigned department or program area.
- Prepares comprehensive technical, statistical and analytical reports, records and recommendations.
- Under general direction, helps to implement the Enterprise Resource Planning (ERP) software changes and upgrades that include:
  - Planning, scheduling, coordinating and overseeing new releases, and installation of related software applications.
  - Studies and reports on unused functions of the software; develops and tests new or modified report formats, customized programs to manipulate data, or changes to file structure; creates or updates functional specifications for new or modified reports and applications.

- Coordinates installation of program fixes and customized menus for business systems; troubleshoots programming and system problems associated with applications already in use; coordinates implementation projects with various business units, functional areas and/or vendors.
  - Reviews various reports and error messages and provides application support to end users for business systems and related applications; may prepare and disseminate sensitive information.
  - Determines, defines and documents current and proposed business process and end user documentation for programs and projects; develops documentation and provides end user training on an on-going basis in support of business processes, financial management system features, related applications, and workflows.
  - Applies accounting and auditing principles and techniques to ensure that data integrity, internal controls, and audit trails are maintained throughout.
- Prepares and processes a variety of bi-weekly, monthly, quarterly and year-end reports; assembles, prepares and enters computer data.
  - Assists in performing research and investigating accounting irregularities and other difficult technical issues.
  - Trains Customer Service Representatives and other support staff in various aspects of financial recordkeeping.
  - Assumes responsibility for ensuring the duties of the position are performed in a safe and efficient manner.
  - Works weekends, evenings and holidays as required to accommodate the District's needs, in addition to responding as a Disaster Emergency Service Worker.
  - Responds to and resolves customer inquiries and complaints; establishes and maintains positive working relationships with customers, managers, staff, internal customers, vendors, and others during the work course using principles of good customer service.
  - Keeps immediate supervisor accurately informed of work progress, including present and potential problems and suggestions for new or improved methods of addressing such problems.
  - Performs other duties as assigned.

## **QUALIFICATIONS**

### **Knowledge of:**

- Principles, methods, and practices of public and business administration
- Methods of research, program analysis, data analysis, and report preparation
- Principles and practices of systems, procedure, and business analysis
- Financial applications such as: Accounts Payable, Accounts Receivable, General Ledger, Fixed Assets, Payroll, Job Cost, Budget, Inventory and Purchasing
- District policies, rules, procedures, and regulations involved in the establishment of customer accounts, customer billing, and account collections.
- Customer Service, Billing, Account management, and Financial system software and procedures, at an intermediate level.

- Customer service and customer relations practices and principles.
- English usage, spelling, grammar and punctuation.
- Modern office practices, equipment, and procedures related to the work, including word processing, database, and spreadsheet software.
- District organization, functions and policies.
- Water and sewer related services.
- Safe work methods and safety regulations and the ability to identify workplace hazards and/or unsafe conditions and take appropriate corrective action.

**Skill/Ability to:**

- Apply advanced analysis methodologies
- Conduct systems analysis, studies, and evaluations involving financial applications
- Read and interpret complex data, information and documents; analyze and solve moderately complex problems; use math/mathematical reasoning; perform highly detailed work under changing, intensive deadlines, on multiple concurrent tasks; work with constant interruptions, and interact with all levels of District management, board members, other elected and appointed governmental officials, media representatives, business and community leaders, employees, the public and others encountered in the course of work.
- Maintain detailed and accurate records
- Interpret and present findings in a clear, concise oral and written form including the creation and use of tables, charts, and graphics to summarize results
- Interpret and apply laws, regulations, policies, and procedures
- Organize workload and meet critical deadlines
- Create and maintain a work environment that promotes effective, thoughtful communication between team members, the general public, and management
- Provide technical training to District staff
- Operate modern office equipment including computer equipment and specialized software applications programs
- Communicate clearly and concisely, both orally and in writing
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work
- Interpret customer accounts and consumption records, and explain District policies.
- Work proficiently with Microsoft Excel, Outlook, Word, PowerPoint and Access.
  
- Work effectively with a small group or individually.
- Travel by vehicle while conducting company business.

**Education and Experience:**

*Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:*

**Education:**

- Bachelor's degree from an accredited college or university with a major in business administration, computer science, finance, economics, accounting, data science, or a related field.

**Experience:**

- Four (4) years of increasingly responsible full-time experience performing business analysis and project management duties.

**Licenses and Certifications:**

- Possession of a valid Class C California Driver's license and satisfactory driving record.

**PHYSICAL DEMANDS**

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; vision to read printed materials and a computer screen; and hearing and speech to communicate in person and over the telephone and to communicate orally with District management, co-workers, and the public in face-to-face, one-to-one and group settings.

This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

**ENVIRONMENTAL CONDITIONS**

Employees work in an 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.