

**MONTGOMERY COUNTY GOVERNMENT  
ROCKVILLE, MARYLAND  
CLASS SPECIFICATION**

**Code No. 000410  
Grade 30**

**SENIOR/LEAD FISCAL AND POLICY ANALYST**

**DEFINITION OF CLASS:**

This is senior or lead level of fiscal and policy analysis work at Montgomery County Government. Employees in this class work either in the Office of Management and Budget or the Department of Finance. Employees function as either senior analysts with responsibility for performing the most complex, politically sensitive or high profile fiscal and policy work, often taking the lead on long-term (multi-year), multi-agency projects **or** as lead workers with responsibility for providing technical direction and guidance to lower level Fiscal and Policy Analysts. As senior analysts, employees are assigned the most complex and challenging portfolios. As lead workers, employees not only assume responsibility for challenging portfolios, but also serve as advisors and mentors to lower level Fiscal and Policy Analysts. Lead workers may delegate certain assignments but do not assume full supervisory responsibility for other employees.

Employees routinely engage in fiscal and policy matters that cross agency and department lines; provide solutions to issues with significant consequences for County residents, clients, customers and employees, and apply expert analytical and negotiation skills in working with department directors and program managers. Work contacts include department directors, senior managers and fiscal staff from assigned departments and agencies; staff members of the offices of the Executive and the County Council, representatives of County agencies and employees of other jurisdictions and local public sector agencies. The nature and purpose of interactions involve the exchange of routine and non-routine information; the facilitation and resolution of issues and problems; discussion of fiscal and policy issues; negotiation with high level department managers and the provision of technically authoritative advice and guidance. Senior/lead workers provide technically authoritative opinion, consult with their colleagues in their offices on a broad array of fiscal and policy matters and, as lead workers, review the work of lower level Fiscal and Policy Analysts. Employees at this level are expected to speak before the County Executive, elected and appointed officials, citizen groups and the public regarding controversial or sensitive policy topics as well as disseminating programmatic and budget information. The work of this class does not require employees to provide direct public service or assistance on a one-to-one basis.

Duties and responsibilities of this class span all major aspects of policy analysis, public sector budgeting or financial analysis. At this level, employees perform the full range of fiscal and policy analysis work with significant independence. Employees receive managerial direction from supervisors or managers who define the overall objectives of assigned work. Completed work is reviewed for its impact on policy and fiscal objectives and mandates. The complexity of the work derives from challenges encountered in variety and disparities of data and information; need to identify financial interrelationships and trends; the range of issues to be addressed and the need to make sound recommendations based on the analysis of sometimes conflicting,

competing or incomplete information or priorities. The scope of the employee's decision making is considerable in that departments, agencies and the County as a whole may be affected. Work is performed in a comfortable office environment. During certain phases of the annual budget cycle, employees may be required to work evenings and weekends.

### **EXAMPLES OF DUTIES: (Illustrative Only)**

#### As a senior analyst:

- Serves as a project leader, subject matter expert or key point of contact for the most complex issues within the area of expertise/responsibility.
- Assumes responsibility for an array of complex multi-department/multi-agency projects and initiatives by coordinating efforts among multiple organizations and staff, leading meetings, monitoring progress of action items and developing end products and deliverables.

#### As a lead worker:

- Reviews the completed work of lower level Fiscal and Policy Analysts.
- Provides technical advice and guidance to lower level Fiscal and Policy Analysts.
- Assumes responsibility for a complex assignment portfolio of significant magnitude and complexity.

#### Representative Examples of Duties in the Office of Management and Budget:

- Provides year-round oversight of a departmental and agency operating or capital improvement budgets and programs; identifies issues having implications of budget requests on service delivery, programs and department operations.
- Determines the broad impact or alignment of budget requests on the priorities of the County Executive and the wellbeing of the County as a whole and develops alternative courses of action or options to present at high level meetings.
- Provides technically authoritative advice and guidance to assigned departments or units regarding interpretation of budget policy, the preparation of budgets, the proper usage of required forms and appropriate narrative justifications.
- Analyzes department and agency operations, reorganizations, restructuring, staffing patterns and recommends actions to improve service delivery and attain maximum cost effectiveness.
- Reconciles budget expenditures and closes out or leads the close-out of special budgets.
- Monitors the control of transfers of funds or appropriations and account adjustments for assigned department, ensuring the accuracy of figures represented for the subject years.
- Provides quarterly review and analysis of programs during budget execution phases.
- Develops, monitors and controls various expenditure, personnel and revenue schedules.
- Performs other duties as assigned.

#### Representative Examples of Duties in the Department of Finance:

- Reviews and analyzes capital construction project cash flow to determine best sizing for new money general obligation bond sales and makes recommendations for debt structuring and timing of bond sales.
- Reviews cost benefit of bond refunding opportunities for general obligation bonds, revenue bonds and special tax district bonds.

- Prepares or assists in preparation of data for the presentation to the bond rating agencies to preserve the County's bond rating, for analysis of economic impact statements or other surveys or audits.
- Manages the financial analyses and makes recommendations for implementation of master and sector plans, redevelopment initiatives and Public-Private Partnerships as directed by County Executive and County Council.
- Reviews requests to reprogram funds and conducts proactive reprogramming analyses; makes recommendations to reprogram funds.
- Administers special funds such as the economic development fund or serves as a grants administrator for the office; reviews grant applications and provides grant funding recommendations.
- Makes recommendations for improved service delivery and cost effectiveness that may include the following financial analyses: bond refunding; economic development fund loan and grant analysis; housing loans reviews and analysis; bond continuing disclosure compliance review; debt and capital budgeting policy and procedures; energy financing and Revenue Authority leased-back financing.
- Create spending affordability guidelines.
- Conducts analysis and evaluation of facility master plans, programs and existing facilities to determine adequacy and develops recommendations for improvements, adjustments or alternative methods of financing.
- Considers the need for allocation of funds related to capital programs and projects consistent with the County's debt limits.
- Assists the Cash Manager in providing high-quality consulting services for County agencies, managers, staff, elected officials, and residents on issues related to cash management, and in managing the County's relationship with the banking and investment community.
- Assists the Chief Economist in developing revenue and economic forecasts, and in publishing reports on economic and revenue analysis on a monthly and quarterly basis for dissemination to the County Council and public.
- Assist the Fiscal Projects Manager in analyzing and drafting legislation and/or executive regulations and administering projects and initiatives as directed. Examples of such projects are: Public Election Fund (public campaign financing) and Commercial Property Assessed Clean Energy (C-PACE).
- Performs other duties as assigned.

#### Representative Examples of Duties in Both Departments:

- Provides training to both internal staff as well as department/agency management, fiscal and program representatives on a variety of policy, budget, and finance topics and procedures.
- Negotiates with multiple parties including high level department and agency staff to reach mutually agreed solutions to difficult problems such as funding shortfalls or new programmatic requirements.
- Represents the executive branch at public hearings, council committee sessions, and Council meetings by providing information on complex, high-profile or controversial issues.
- Serves on standing or ad hoc committees, task forces and workgroups or participates on legislative and community boards and commissions

- Develops, assesses and validates key underlying fiscal or programmatic facts and assumptions such as funding streams, service demands and variables including demographic and economic factors.
- Coordinates the review and analysis of Fiscal Impact Statements or Economic Impact Statements; coordinates across multiple departments, obtains or prepares necessary data inputs, legal review and economic analysis.
- Uses a wide range of management and program analysis methods and techniques for fact finding, investigation and evaluation to include literature reviews, case studies, site studies, interviews, surveys, process mapping, cost/benefit analysis, return on investment, total cost of ownership and pilot projects.
- Analyzes proposed state and County legislation for fiscal and budgetary impact on departmental operations, services, and programs.
- Gathers information by conducting facility site visits, field audits and interviews; researching best practices or industry standards and develops reports, statistical analyses, summaries, position papers and correspondence after consolidating and evaluating information from various sources.
- Identifies and investigates ambiguous or inadequate expenditures, justifications or proposals.
- Makes recommendations to the Budget Director, the Finance Director, and/or the County Executive regarding resource allocation to promote greater efficiency and economy for assigned departments or units.
- Prepares statistical analyses, reports, summaries and correspondence as required.
- Uses automated tools and information systems to analyze fiscal information and data such as trends in expenditures and to project future expenditure patterns.
- Performs other duties as assigned.

#### **KNOWLEDGE, SKILLS AND ABILITIES:**

- Extensive knowledge of the principles and practices of public and/or business administration including knowledge of governmental budgeting, human resources, contracts, procurement and financial administration.
- Extensive knowledge of the principles, methods, techniques and generally accepted practices of management and program analysis.
- Extensive knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.
- Extensive knowledge of debt management, financing options and other governmental financial issues.
- Skill in applying the knowledge of the programs, services, operations, funding sources, and other programmatic aspects and issues of assigned departments and agencies to identify and advise on fiscal and policy matters.
- Skill in problem solving and reconciling conflicting or ambiguous data and information.
- Skill in applying critical thinking and problem solving to identify and logically process relevant information, ascertain key relationships and trends in received information and data.
- Skill in comprehending and analyzing multiple organization operations and structures and making technically sound recommendations.
- Skill in negotiating with department and agency directors and program managers to reach mutually agreed solutions to difficult problems.

- Skill in preparing comprehensive reports and position papers and other documents for presentation to diverse audiences.
- Skill in presenting information verbally to diverse audiences.
- Ability to train, and assign and review the work of lower level Fiscal and Policy Analysts.
- Ability to use automated systems technology and software as tools for analyzing operating and capital budgets and related matters.
- Ability to establish and maintain effective working relationships.
- Ability to work tactfully and equitably with people.
- Ability to attend meetings or perform other assignments at locations outside the office, if necessary.

#### **MINIMUM QUALIFICATIONS:**

**Experience:** Five (5) years of professional experience reviewing, analyzing and monitoring operating and/or capital budgets, including at least one (1) year of experience analyzing and reporting on policy, management and programmatic issues having budgetary implications.

**Education:** Graduation from an accredited college or university with a Bachelor's Degree.

**Equivalency:** (1) An equivalent combination of education and experience may be substituted.

(2) Possession of a graduate degree in Public Administration, Public Policy, Business Administration, Economics, Finance or a related field from an accredited college or university may be substituted for the required education and one year of the required experience.

(3) Depending on the position in the Department of Finance, the following substitution may be made for the above experience: Five (5) years of professional experience performing financial analysis in at least one of the following areas: cash management, debt management, investments, economic development fund analysis and development, and economic and fiscal analyses, including at least one (1) year of experience analyzing and reporting on policy, management and programmatic issues having financial implications.

**LICENSE:** None.

#### **PROBATIONARY PERIOD:**

Individuals appointed to a position in this class will be required to serve a probationary period of twelve (12) months and, if promoted to a position in this class, will be required to serve a probationary period of six (6) months. Performance will be carefully evaluated during the probationary period. Continuation in this class will be contingent upon successful completion of the probationary period

**MEDICAL EXAM PROTOCOL:** Medical History Review

**Class Established:** April, 2017

**Revised:** September 2017