

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

**Code No. 000411
Grade 28**

FISCAL AND POLICY ANALYST III

DEFINITION OF CLASS:

This is full performance professional staff work in fiscal and policy analysis at Montgomery County Government. Employees work in either the Office of Management and Budget or the Department of Finance. Employees assigned to the Office of Management and Budget perform complex and challenging work by facilitating the resolution of cross-cutting issues and multi-agency matters, working collaboratively with diverse contacts and stakeholders, and negotiating with department directors and program managers in resolving problems. Employees assigned to the Department of Finance engage in complex and challenging research, analytical, programmatic and administrative duties in support of a variety of Finance areas such as investment, economic development planning, debt management, cash management, and economic forecasting and fiscal analysis. Employees complete work assignments of significant complexity that involve facilitating resolution of issues across multiple agencies and facilitating the resolution of issues with more diverse contacts. Work contacts include department directors, senior managers and fiscal staff of 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, coordination of efforts, discussion of fiscal, program and policy issues; the reconciliation of data and provision of technically authoritative advice and guidance to assigned departments or units, facilitating the resolution of issues with significant fiscal policy implications; negotiating with high level department managers. Employees are expected to speak before the County Executive, elected and appointed officials, department directors and senior managers, citizen groups and the public regarding controversial or sensitive policy topics as well as disseminating basic 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 center on one or more Finance areas such as cash management, debt management, investment, economic development fund, economic forecasting and master/sector plan financing. Employees in this class perform the full range of fiscal, policy and financial analysis work with significant independence. They are assigned the most challenging portfolio of department and agencies and/or cross-functional issues. Employees receive general direction from supervisors or more senior Fiscal and Policy Analysts who define the overall objectives, priorities and deadlines 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 the variety and disparities of data and information submitted by assigned departments and agencies; need to identify financial interrelationships and trends that should 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)

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

- Independently conducts or leads a wide variety of multi-department, cross-cutting and complex studies and initiatives by coordinating efforts among multiple organizations and staff, leading meetings, monitoring progress of action items and developing end products and deliverables.
- 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.
- 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.
- Develops, monitors and controls various expenditure, personnel and revenue schedules.
- 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.
- 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 solutions and alternatives to staffing and service delivery issues that enhance organizational efficiency and attain maximum cost effectiveness.
- Analyzes operating budget and capital funding requests of assigned departments and agencies to determine the implications of requests on service delivery, programs and department operations.
- Performs other duties as assigned.

Representative Examples of Duties in the Department of Finance:

- Assist 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.
- Assist 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).
- Prepares or assists in the preparation of data for presentation to bond rating agencies, for the analysis of economic impact statements or other surveys or audits.

- Participates or assists in the review and analysis of capital construction project cash flow and makes recommendations for debt structuring and timing of bond sales.
- Assists in the review of cost benefit of bond refunding opportunities.
- Assists in conducting various financial analyses to make recommendations for improved service delivery and cost effectiveness for assigned departments or project areas.
- Performs other duties as assigned.

Representative Examples of Duties in Both Departments:

- Identifies and investigates ambiguous or inadequate expenditures, justifications or proposals.
- Gathers information by conducting facility site visits, field audits and interviews; researching best practices or industry standards and develops reports, statistical analyses, summaries and correspondence after consolidating and evaluating information from various sources.
- Represents the executive branch at public hearings, County Council committee sessions, and County Council meetings by providing information on complex or controversial issues.
- Conducts analysis and evaluation of program of requirements, 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.
- 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.
- Analyzes proposed legislation for fiscal and budgetary impact on departmental operations, services, and programs.
- 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 automated tools and information systems to analyze and project expenditures of assigned departments or units.
- Prepares statistical analyses, reports, summaries and correspondence as required.
- Serves on standing or ad hoc committees, task forces and workgroups.
- May serve on ad hoc teams to perform management analyses, program evaluation and other special studies and projects.
- May participate in the development and delivery of training and workshop sessions to department or agency management, fiscal and program representatives on policy, budget and fiscal topics and procedures.
- Performs other duties as assigned.

KNOWLEDGE, SKILLS AND ABILITIES:

- Knowledge of the principles and practices of public and/or business administration including knowledge of governmental budgeting, fiscal and policy analysis.
- Knowledge of the principles, methods, techniques and generally accepted practices of management and program analysis.
- Knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.

- Skill in negotiating with high level department and agency managers to reach agreement mutually agreed solutions to difficult problems.
- 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 preparing comprehensive reports and position papers and other documents for presentation to diverse audiences.
- Skill in presenting information verbally to diverse audiences.
- 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: Four (4) 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: Four (4) 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