

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

**Code No. 000413
Grade 21**

FISCAL AND POLICY ANALYST I

DEFINITION OF CLASS:

This is beginning level professional staff work in fiscal and policy analysis at Montgomery County Government. Employees in this class work either in the Office of Management and Budget or the Department of Finance. Employees assigned to the Office of Management and Budget analyze and conduct studies of proposed operating and capital budgets and the implications of fiscal decisions on management programs and operations. Employees are involved in all or certain phases of budget formulation, justification and execution and perform fiscal and policy analysis for assigned departments or units of a major department. Employees assigned to the Department of Finance engage in research, analytical, programmatic and administrative duties in support of one or more Finance areas such as investment, economic development planning, debt management, cash management, and economic forecasting and fiscal analysis. Employees at this level contribute by furnishing completed work products while simultaneously learning and applying knowledge of County-specific operations, services and programs. Work contacts include department directors, senior managers and fiscal staff from assigned departments and agencies; staff members of the offices of the County 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 and the reconciliation of data and provision of technical advice and guidance to assigned departments or units. Employees are expected to speak before the County Executive, elected and appointed officials, department directors and senior managers, citizen groups and the public regarding factual information and straightforward issues. 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 may span all or some 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. An employee is assigned a small portfolio of departments and agencies or certain units of larger departments. Employees receive close supervision from supervisors or more senior Fiscal and Policy Analysts who provide well-defined instruction and guidance for most assignments. Work products are reviewed for compliance with instructions and established guidelines; appropriateness and accuracy in the presentation of facts, figures and summary information; timeliness; soundness of recommendations and adherence to generally accepted fiscal and financial work methods and procedures. The complexity of the work derives from challenges encountered in the variety and disparities of data and information submitted by assigned department and agencies; need to evaluate information from several sources; the timeframes and deadlines based on budgetary cycles and the need to develop sound recommendations based on analysis of conflicting or incomplete information. Decision making at this level affects the units or department as a whole. 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:

- Analyzes operating budget and capital funding requests of assigned departments and agencies and considers the implications on service delivery, program objectives and department operations.
- Provides technical advice and guidance including the interpretation of budget policy to assigned departments or units regarding the preparation of budgets, the proper usage of required forms and appropriate narrative justifications.
- Monitors the control of transfers of funds or appropriations and account adjustments for assigned departments, ensuring the accuracy of figures represented for the subject years.
- Provides quarterly review and analysis of programs during budget execution phases.
- Performs other duties as assigned.

Representative Examples of Duties in the Department of Finance:

- 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 the public.
- Assists 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 or conducts 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 moderately complex issues and serving on standing or ad hoc committees, task forces and workgroups.

- 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.
- 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.
- 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.
- Attends meetings and public hearings to present fiscal and programmatic information or the justifications of proposed department or agency budget requests and program proposals.
- Uses automated tools and information systems to analyze fiscal information and data such as trends in expenditures and to project future expenditure patterns.
Prepares statistical analyses, reports, summaries and correspondence as required.
- May serve on ad hoc teams to perform management analyses, program evaluation and other special studies and projects.
- Performs other duties as assigned.

KNOWLEDGE, SKILLS AND ABILITIES:

- Knowledge of the fundamental principles and practices of public and/or business administration including knowledge of governmental budgeting, fiscal and policy analysis.
- Knowledge of the fundamental principles, methods, techniques and generally accepted practices of management and program analysis to identify, report and advise on fiscal implications of various programmatic and operational issues.
- Knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.
- 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.
- Ability to analyze and comprehend organization operations and structures and make pertinent recommendations.
- Ability to prepare concise and comprehensive reports for presentation both orally and in writing.
- Ability to use automated systems technology and software as tools for analyzing fiscal data and information 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: Two (2) 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: Two (2) 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