



# THE STATE BAR OF CALIFORNIA

OFFICE OF HUMAN RESOURCES

845 SOUTH FIGUEROA STREET, LOS ANGELES, CA 90017-2515 (213) 765-1100 • 180 HOWARD STREET, SAN FRANCISCO, CA 94105-1639 (415) 538-2351

## SENIOR FINANCIAL ANALYST

Office: Finance / Budget  
Status: Exempt – Confidential  
Grade: 40C

### ORGANIZATIONAL RELATIONSHIPS

Reports to: Executive Staff  
Supervises: Staff as assigned

### DEFINITION

The Senior Financial Analyst Confidential (SFAC) is responsible for the financial analysis supporting the State Bar's budget and budget processes including budgeting, long and short-range fiscal planning, financial analysis, general and special fund accounting, and related activities in accordance with generally accepted accounting standards. The SFAC assists in the formulation, determination, and effectuation of management policies in the administration and effectuation of employee and labor relations, and is responsible for maintaining confidentiality concerning such matters.

### MAJOR DUTIES & RESPONSIBILITIES

1. The SFAC maintains effective working relationships with colleagues within the State Bar and professional relationships with external constituencies.
2. The SFAC provides the financial analysis to support the State Bar's institutional budget process including accounting functions, long and short-range financial planning; budget development; special and general fund accounting, variance analysis, audit response.
3. The SFAC participates in the supervision, review, hire and termination of assigned staff consistent with overall all State Bar policy.
4. The SFAC develops fiscal policies and procedures, strategic plans, budgets forecasts and financial projections and statements, and reports consistent with generally accepted accounting standards.
5. The SFAC formulates short-term and long-term fiscal goals, policies, controls, and plans to improve the efficiency and efficacy of the State Bar's budget process. This involves the analysis and development of budgetary instructions, policies, procedures and guidelines, to be utilized by every unit and cost center within the State Bar.
6. The SFAC coordinates and initiates as appropriate, inter-office projects, programs and activities.
7. The SFAC provides fiscal analysis to Executive Staff.
8. The SFAC responds to inquiries from Executive Staff, auditors and other constituencies regarding the State Bar's budget.

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9. The SFAC provides the financial analysis to support the preparation and administration of the budget and the administration of the State Bar's fiscal resources within institutional parameters.
10. The SFAC assists in the formulation, determination, and effectuation of management policies in the administration and effectuation of employee and labor relations, and is responsible for maintaining confidentiality concerning such matters.
11. The SFAC promotes the integrity, prudence, and efficacy of the State Bar's budget process.
12. The SFAC assumes other duties and responsibilities as assigned.

### **KNOWLEDGE & SKILLS**

1. Principles of financial analysis.
2. Principles of office management, budgeting, administration and supervision.
3. Principles of problem identification, analysis and resolution.
4. Principles of computerized data and word processing systems including Internet and website usage.
5. Principles of financial software tools and databases.
6. Principles of senior institutional management.
7. Principles of effective writing and verbal presentations, including public speaking.
8. Principles of accounting, auditing, budgeting, financial control and reporting in the governmental public sector, particularly including Government Accounting Standards and special/general fund administration.
9. Principles of effective supervision.
10. Accomplished keyboarding skills.

### **ESSENTIAL ELEMENTS / ABILITY TO**

1. Receive and relay detailed information through verbal and written communications.
2. Communicate clearly and effectively in person, by telephone, by computer and in writing.
3. Possess visual capability and digital dexterity to operate a computer and other standard office equipment.
4. Travel by air and automobile.
5. Make fine visual distinctions upon proofreading written documents and viewing information on a computer screen.
6. Review and analyze complex written and financial data.
7. Obtain and present material in oral and/or written form.
8. Perform under stress and adopt effective course(s) of action.
9. Effectively interact with others in an interactive environment.
10. Retrieve, lift and carry files and documents weighing up to ten (10) pounds with reasonable accommodations.

### **MINIMUM QUALIFICATIONS**

1. Bachelor's Degree in Accounting or Finance or equivalent academic achievement.
2. A demonstrated verifiable reputation for integrity.
3. Minimum five (5) years of experience in financial analysis and accounting.
4. Minimum two (2) years supervisory experience, which may be included in #2 above.

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5. Successful completion of the State Bar validated standard tests for the position.

*Revised November 2012*