

South Bay Cities Council of Governments

December 8, 2025

TO: SBCCOG Steering Committee

FROM: Jacki Bacharach, Executive Director

SUBJECT: New Job Description & Salary Range – Financial Analyst

BACKGROUND

The South Bay Cities Council of Governments (SBCCOG) continues to expand programs and funding resulting in significant growth, including most recently, the addition of the new Measure A homeless services funds and related programs. Proactively, in July 2025, the Board authorized a classification and compensation study to address organizational and program growth. That study is currently underway with recommendations expected in January 2026 for Board review and consideration of approval.

In the meantime, it has become clear that the finance function needs immediate assistance of additional staff to help address the surge of funding and contracts being generated. Currently, the SBCCOG finance function has an Administrative Officer and one Administrative Assistant along with a contracted accounting firm to conduct all the finance related functions including payroll, accounting, invoicing, payment processing, budget, audit, contract and program tracking, etc. This team is too small for the volume of work they are managing.

ANALYSIS

Working with the human resources firm currently conducting the classification and compensation study, SBCCOG staff assessed needs and reviewed similar agency positions. It was determined that a new position was required to meet the existing and growing needs of the finance function – Financial Analyst. This exempt at-will position would report to the Administrative Officer (Finance Manager) and work closely with the project/program managers to manage general ledger functions, grant accounting, invoicing, reconciliations, financial reporting, and support budget development in compliance with General Accepted Accounting Principles and funding requirements (full description and qualifications on Attachment A). Due to the level of responsibility and required experience and skills, the recommended salary range is \$84,881-\$105,472. This position range is the same as the current Senior Project Manager position.

Approval at this December Board meeting, ahead of the classification and compensation study recommendations, will allow the SBCCOG staff to begin recruitment – as this can be a long process. If approved, this new position will be incorporated into the final classification and compensation study report.

Also, note that at least 50% of the cost of this position will be charged to Measure A and possibly more after additional budget analysis is done.

RECOMMENDATION

Approve new Financial Analyst job description with a salary range of \$84,881-\$105,472.

SOUTH BAY CITIES COUNCIL OF GOVERNMENTS (SBCCOG)
JOB DESCRIPTION

FINANCIAL ANALYST

JOB SUMMARY

This professional-level position performs technical and complex accounting, auditing, budgeting, invoicing, financial reporting, and analytical work in support of the organization's programs and operations. The Financial Analyst manages general ledger functions, grant accounting, forecasting, reconciliations, financial reporting, and supports budget development; coordinates with program managers, granting agencies, and partner organizations to ensure compliance with General Accepted Accounting Principles (GAAP) and funding requirements; provides analytical support, prepares financial statements, and assists with audit preparation. The Financial Analyst may provide training and instruction to lower-level financial, administrative, and accounting staff; participates in policy, procedural, and process improvements; may serve as a back-up in the absence of the Finance Manager.

DISTINGUISHING CHARACTERISTICS

This position is the professional-level classification responsible for performing the full range of technical and complex accounting, auditing, budgeting, and analytical work. This classification is distinguished from the next higher classification of Finance Manager in that the latter has overall responsibility for the Finance Function and overall responsibility for planning, organizing, and directing the accounting and finance functions for SBCCOG.

ESSENTIAL JOB FUNCTIONS, DUTIES, AND RESPONSIBILITIES

Under the direction of the Finance Manager, the Financial Analyst will:

- Perform financial activities consistent with GAAP, including general ledger accounting, accounts payable, accounts receivable, and budget support.
- Compile and analyze financial data; prepare journal entries, financial statements, reports, and reconciliations.
- Coordinate grant budgets, prepare invoices, including related reporting, track and reconcile consultant and program expenditures.
- Prepare monthly, quarterly, and annual financial reports for funding agencies.
- Support audit preparation and financial reporting processes; assist with the annual and mid-year budgets.
- Serve as budget liaison to assigned program and project managers; monitor and forecast revenues and expenditures.
- Monitor legislation, regulations, and industry practices in assigned program areas; recommend policy and procedural updates.
- Provide training and instruction to staff as requested.
- Develop and maintain positive working relationships with internal staff, agencies, and the public.
- Conduct cash flow monitoring and assist with treasury and banking coordination.
- Review and monitor internal control processes and recommend improvements.
- Perform cost allocation analyses and support development of indirect cost rates.

- Review financial components of contracts and procurements for funding availability and compliance.
- Monitor non-grant revenue streams, billing accuracy, and reconcile revenue activities.
- Document financial procedures, workflows, and updates to finance-related practices.
- Support year-end close activities, including accruals, adjustments, and schedule preparation.
- Assist with financial system reporting, configuration needs, and user testing.
- Attend training, meetings, and conferences.
- Performs related duties as assigned.

CLASSIFICATION

The position is exempt under the Fair Labor Standards Act.

QUALIFICATIONS

Education and Experience

A Bachelor's degree in accounting, finance, business administration, or related field, and at least three (3) years of increasingly responsible professional accounting experience, preferably in local government. Experience with grant-funded programs is desirable.

Knowledge of:

Municipal and fund accounting principles and practices consistent with GAAP; governmental budgeting methods, financial reporting requirements, and audit procedures; general ledger structure and accounting cycles; accounts payable and accounts receivable processes; grant accounting requirements, reimbursement rules, and invoicing standards; budget schedules and documentation requirements; internal control practices; reconciliation methods; procurement and contract processes; audit procedures; ethical standards and confidentiality requirements.

Skill to:

Perform complex professional accounting work and make appropriate and effective recommendations; prepare journal entries, reconciliations, financial statements, and reports;; prepare grant and funding reports; develop grant budgets and reimbursement requests; interpret funding requirements; identify discrepancies and recommend corrective actions; coordinate with program managers, granting agencies, auditors, and staff; manage multiple deadlines; use accounting software and spreadsheets effectively; establish and maintain effective working relationships with others.

Ability to:

Perform complex mathematical calculations and financial analyses accurately and timely; apply GAAP and governmental accounting standards; assist in the development of and monitor budgets; prepare accurate audit and budget documentation; identify and implement process improvements; communicate clearly in written and verbal form; organize work and meet deadlines; exercise discretion and sound judgment; work collaboratively and independently; build cooperative relationships.

Licenses and/or Certifications

Must possess a valid California Driver's License.

Physical Requirements and Working Conditions

While performing the duties of this job, the employee is required to sit and talk or hear and use a telephone and a personal computer with a VDT screen for extended periods of time. The employee is required to drive to various locations, may be required to work outdoors and be exposed to variable weather conditions and noise levels. The employee is occasionally required to stand, walk, stoop, kneel, and use arms, legs, and back to lift and/or move up to 25 pounds.

Job description statements describe the general nature and level of work performed by employees and are not intended as an exhaustive list of all responsibilities, duties and skills required.

Date: November 2025