

## **Management Analyst (9184) Task List (2026)**

### **I. Data Collection, Analytics & Reporting**

1. Collects operational, fiscal, and contract-related data from enterprise systems, reports, and internal and/or external sources across assigned units, divisions, departments or bureaus on an ongoing basis, using established data sources and reporting tools, in order to compare current performance with historical trends and support forecasting, planning, and management decision-making.
2. Analyzes quantitative data using basic statistical methods, system-generated reports, and spreadsheets, and evaluates projected goals, objectives, and budget assumptions by comparing planned outcomes to actual results, analyzing cost effectiveness, and documenting variances, all to identify performance trends, monitor budget performance, and inform corrective actions or recommendations.
3. Prepares, maintains, and interprets tables, charts, graphs, and dashboards using approved reporting tools and software, for inclusion in narrative reports, presentations, and Board-related materials, in order to clearly communicate complex information to management and stakeholders.
4. Monitors performance data by tracking progress against established unit, bureau, or departmental objectives using system reports and analytical tools, in order to assess goal attainment, support forecasts, and develop data-driven recommendations.
5. Researches applicable regulations, City policies, and program documentation by reviewing written materials, interviewing subject-matter experts, and organizing relevant data, in order to support analytical studies, compliance reviews, and management inquiries.
6. Reviews and interprets collected data by synthesizing quantitative and qualitative information, formulating conclusions, and developing written recommendations, in order to complete assigned analytical projects and advise management.
7. Analyzes historical and current data to identify trends and develop projections using established analytical methods, in order to support future planning, resource allocation, and strategic direction.

### **II. Budget Development & Administration**

8. Organizes budget request materials submitted by sections, divisions, or units within the department, using established budget instructions, system workflows,

and management-defined priorities, in order to facilitate management review and analysis during the budget development cycle.

9. Reviews budget request documents received from operating units for completeness, consistency, and required supporting documentation, using applicable budget guidelines and checklists, in order to ensure requests are sufficiently supported for management consideration.
10. Participates in the development of operating budgets for assigned sections or divisions by analyzing needs, estimating expense, equipment, and personnel impacts, and coordinating with management and department leadership, in order to support informed budget planning and decision-making.
11. Coordinates budget development with section heads and designated staff by communicating requirements, clarifying assumptions, and assessing resource priorities through structured budget calls, meetings, and system inputs, in order to compile accurate data and ensure all funding requests align with overarching organizational goals.
12. Compiles and summarizes budget information for assigned programs, sections, or divisions by analyzing historical budget data, applicable manuals, executive guidance, and departmental directives, in order to support departmental budget submissions prepared by Finance or executive management.
13. Drafts analytical narratives for specific budget requests by summarizing past performance, workload data, need, and anticipated benefits, using quantitative and qualitative information, in order to support justification of requested resources.
14. Advises and supports section, unit, or division personnel and internal stakeholders on budget preparation and budget-related inquiries by explaining required information, formats, and attachments; identifying calculation or documentation issues; and preparing summaries or responses through established channels, in order to improve the quality and accuracy of submitted budget materials and support budget review and approval processes.
15. Assists in drafting position descriptions for newly requested positions by gathering duty information from operating units and aligning content with classification standards, in order to support budget and staffing requests.

### **III. Procurement & Contract Management**

16. Reviews purchasing requests and requisition-related information submitted by operating units within the department, using budget data, equipment inventories, account status, and applicable procurement guidelines, in order to assess funding availability, identify data gaps, and support authorized procurement staff

in obtaining approved, budgeted supplies through established systems and procedure.

17. Prepares requests for proposals and other procurement types for services and materials and administrators assigned contracts throughout their lifecycle to ensure compliance with contractual terms, applicable laws, City Charter provisions, administrative requirements, and departmental policies.
18. Reviews and monitors contract milestones, deliverables, invoices, expenditures, insurance, bonds, and performance metrics; prepares and processes contract amendments, renewals, and close-outs; coordinates with legal, finance, procurement, project managers, and vendors to resolve contract issues; documents compliance actions and recommendations; and escalates risks, non-performance, or policy concerns to management for decision-making.
19. Analyzes requests for new or non-standard equipment or supplies by evaluating cost information, alternatives, potential cost savings, and funding impacts, and by preparing supporting justification narratives and documentation, in order to assist authorized personnel with deviation or exception requests submitted in accordance with applicable procurement and budget requirements.

#### **IV. Personnel Administration**

20. Designs and/or utilizes internal worksheets, trackers, and compliance tools used within the department, by identifying information-gathering needs and applying applicable City, State, and Federal requirements, in order to support personnel analysis, reporting, and informed decision-making.
21. Prepares and coordinates required documentation to support the authorization, classification, and recruitment of vacant and newly approved positions, ensuring alignment with organizational needs, budget authority, and applicable Civil Service, HR, and administrative requirements.
22. Coordinate and support the onboarding of new employees within the section to ensure they understand the unit's mission, organizational structure, workflows, roles and responsibilities, and applicable policies and procedures, and serves as a knowledgeable resource to facilitate a smooth transition and timely integration into daily operations.
23. Facilitates the comprehensive hiring process and participates as an interview panel member by analyzing position requirements to develop job-related questions, coordinating interview logistics with Human Resources/Personnel, and evaluating applicant skills using approved rating forms in order to ensure fair, compliant, and well-documented selection outcomes for transfer or hire.

24. Responds to employee inquiries involving technical personnel matters (e.g., leave, classification, retirement) and refers them to Human Resources/Personnel or appropriate management contacts to ensure accurate, policy-compliant, and authorized responses.
25. Maintains and updates departmental records related to position authority, staffing status, and employment actions by tracking approved positions, in-lieu or emergency appointments, and out-of-class assignments, in order to support position control and workforce planning.

## **V. Written Communication**

26. Drafts formal letters, memoranda, and email correspondence to internal divisions, City departments, or external agencies, using appropriate professional tone and format, in order to obtain or provide information, coordinate activities, monitor programs, convey recommendations, or support investigations as directed by management.
27. Writes formal, narrative analytical reports on administrative, fiscal, or operational subjects by synthesizing data and organizing content into clear sections such as background, methodology, findings, and conclusions using audience-appropriate language in order to clearly document project outcomes, summarize investigations, and inform management decision-making.
28. Prepares written materials, including reports, memoranda, and briefing documents, that explain issues, justify positions, or recommend actions, by presenting logical arguments supported by data and analysis, in order to inform, persuade, or gain acceptance of recommendations.
29. Compiles reference information and drafts departmental manuals, instructional materials, and guidance documents by researching applicable legal sources and translating complex requirements into clear language in order to accurately document standardized processes, support training, and ensure consistent application of departmental procedures.

## **VI. Staff Supervision & Development**

30. Reviews the work products of assigned subordinate or support staff within the unit by checking for accuracy, completeness, timeliness, and adherence to established procedures, on an ongoing basis, in order to maintain unit productivity, ensure proper records, and support consistent work quality.
31. Provides guidance, coaching, and constructive feedback to assigned staff by recognizing accomplishments, addressing performance concerns, and documenting observations, in order to support professional development, resolve

issues, and maintain positive employee morale. (Formal discipline and performance evaluations are performed only when explicitly delegated.)

32. Assigns and directs project-based work such as research tasks and analyses by identifying priorities, matching assignments to staff capabilities, and clearly communicating due dates, required formats, and expected deliverables in order to accomplish departmental objectives efficiently and ensure assignments are completed accurately and on schedule.
33. Monitors progress on assigned work by asking clarifying questions, reviewing notes and draft materials, and tracking due dates, in order to verify that assignments remain on track and issues are addressed promptly.
34. Reviews personnel-related documents, such as timekeeping records, leave requests, injury-on-duty forms, and return-to-work documentation, for accuracy and completeness when designated, in order to support proper recordkeeping and compliance with established requirements.
35. Trains new and current staff by providing on-the-job instruction and guidance related to office procedures, systems, computer applications, and departmental processes, in order to improve staff skills, consistency, and overall operational effectiveness.
36. Coordinates department-level or unit-specific training activities by identifying training needs, developing agendas, selecting appropriate participants, and arranging logistics such as meeting locations, virtual platforms, or external training sites, in collaboration with management and subject-matter experts, in order to support staff development, ensure consistent application of procedures, and enhance operational effectiveness.

## **VII. Oral Communication**

37. Contacts department managers, City staff, external agencies, businesses, or members of the public by phone, video conference, or in person, to obtain or provide information, monitor program activities, and offer analytical input, in order to support coordination, problem resolution, and informed decision-making.
38. Interviews complainants and/or other involved parties by gathering relevant information through structured discussions and follow-up questions, and by providing oral or written responses, in order to support administrative investigations and address reported issues.
39. Provides technical or subject-matter information during hearings, meetings, or proceedings, when requested and coordinated through management or legal counsel, in order to explain factual or analytical matters related to assigned work. (Formal expert witness testimony occurs only when specifically authorized.)

40. Counsels employees by discussing work-related issues, performance expectations, or available resources, when serving in a supervisory or lead-worker role, in order to identify concerns, support improvement, and resolve workplace issues. (Formal discipline or grievance resolution occurs only when delegated.).
41. Presents analytical findings, background information, or recommendations in support of management-sponsored items, and responds to questions by providing factual, technical, or analytical information related to department-prepared reports, when designated, before City commissions, Council committees, courts, hearing officers, or other official bodies in order to explain departmental actions, support management-led representation, and ensure accurate communication.
42. Meets with representatives of community groups, businesses, agencies, and/or internal stakeholders to explain applicable rules, procedures, or practices and to discuss project-specific issues, in order to facilitate collaboration and ensure shared understanding.
43. Briefs department management by verbally presenting analyses, options, risks, and recommendations related to departmental issues or projects, in order to inform leadership, obtain guidance, and support decision-making.

### **VIII. Problem Solving & Issue Resolution**

44. Responds to inquiries from members of the public, business owners, vendors, or internal customers, orally or in writing, by explaining applicable processes, requirements, or next steps related to assigned programs or activities, in order to provide assistance and help resolve specific problems.
45. Explains and clarifies applicable policies, procedures, regulations, or administrative requirements to employees, customers, or businesses by interpreting written guidance and coordinating with subject-matter experts when needed, in order to promote understanding, compliance, and resolution of issues.
46. Reviews certificates, permits, and other supporting documents submitted by vendors, contractors, or program participants by checking for completeness, accuracy, and conformance with applicable departmental or legal requirements, in order to identify deficiencies and support compliance through appropriate follow-up.

### **IX. Miscellaneous**

47. Coordinates with internal divisions and external departments or service-providing agencies by acting as a liaison, communicating requirements, and preparing

alteration or improvement requests, as needed, in order to support planning, coordination, and timely resolution of facilities-related maintenance or space needs.

48. Consults with City Attorney staff and related offices by discussing legal questions related to contracts, labor relations, or departmental matters, and by summarizing issues and options, in order to obtain legal guidance and support management in formulating informed recommendations.
49. Develops and monitors departmental or unit-level policies and procedures by translating study findings, conclusions, or management directives into written guidance and tracking implementation, in order to support consistent operations and achievement of intended outcomes.
50. Analyzes operational data, such as service requests, workload metrics, call volumes, or survey results, by reviewing reports and trend information, in order to support management decisions related to staffing needs, workload balancing, and resource allocation.
51. Designs training materials such as guides and presentations by organizing technical content into clear instructional formats, and delivers training sessions to department personnel on procedures and compliance requirements in order to support effective program operations, improve staff understanding, and ensure adherence to applicable policies.
52. Verifies that required actions specified by departmental or City regulations have been completed by reviewing documentation, confirming status with responsible parties, and recording outcomes, in order to support compliance monitoring and audit-ready documentation.