

FINANCIAL ANALYST

*Class specifications are intended to present a descriptive list of the range of duties performed by employees in the class. Specifications are **not** intended to reflect all duties performed within the job.*

DEFINITION

Under supervision, performs various analytical functions in the area of finance, accounting, economics, or a related field; undertakes projects; conducts research studies; prepares reports and correspondence; and performs specialized staff functions as assigned.

CLASS CHARACTERISTICS

This is a professional financial administrative position. Employees in this class perform responsible financial and administrative duties, receive only occasional instruction or assistance as new or unusual situations arise, are fully aware of the operating procedures and policies of the work unit, and may be assigned supervisory responsibilities. This position differs from the Accountant series, in that the job duties require extensive analytical work, Excel modeling, public policy research and evaluation, complex problem solving abilities, and assignment to special projects, often involving work in a team environment.

EXAMPLES OF DUTIES - *Examples of duties performed by employees in this class may not include all required duties, nor are all listed tasks necessarily performed by everyone in this class.*

Prepares extensive budgetary, financial and revenue analyses applicable to City-wide budgetary control and financial management; performs complex studies and research projects on budget, finance and accounting systems; analyzes and reviews financial data to develop forecasts, trends, and recommendations; enters, retrieves and analyzes information from data processing applications and systems related to municipal budgeting and accounting operations; prepares reports, both analytical and statistical; makes recommendations, including methods for implementation on a broad range of assigned subject matter areas; assists various operating departments on evaluating and formulating solutions to budget, accounting, and financial management issues and questions; may assume supervisory responsibility over office staff; and performs related work as required.

MINIMUM QUALIFICATIONS

Knowledge of:

- Organization and operation of municipal government and associated reporting issues;
- Applicable Federal, state and government agency laws and regulations pertaining to accounting;
- Budgeting, finance and accounting principles, practices, procedures and terminology;
- Principles and practices of general, enterprise and governmental accounting;
- Principles and practices of internal control;

- Methods and techniques applicable to advanced financial analysis;
- Public sector employee relations theory, practice and issues;
- Principles and practices of supervision;
- Methods and techniques applicable to advanced financial research and analysis;
- Data processing applications and systems related to municipal budgeting and accounting operations, procedures and practices;
- Technical report writing styles and basic statistical techniques;
- Principles and practices of public sector contract administration; and
- Principles and practices of customer service.

Ability to:

- Assist in the preparation of operating and capital improvement budgets;
- Analyze complex financial problems and develop solutions;
- Conduct feasibility studies, analyze and review fiscal data in order to develop forecast, trends, and analysis;
- Research and analyze problems and make effective recommendations on a variety of budgetary and fiscal issues;
- Prepare clear, concise oral and written reports, both narrative and statistical;
- Establish and maintain effective working relationships;
- Effectively supervise the work of others;
- Communicate effectively orally and in writing;
- Use computer terminals and systems to enter and retrieve data.

Experience and Training Guidelines

Experience: A minimum of three years of progressively responsible experience in financial, revenue or budget analysis. Experience with quantitative analysis using spreadsheet databases (ie; Excel) is highly desirable.

Training: Graduation from an accredited college or university with a Bachelor's degree in public administration, economics, business administration, accounting, finance or a related discipline.

WORKING CONDITIONS

Environmental Conditions: Office environment; exposure to computer screens

Physical Conditions: Essential and marginal functions may require maintaining physical condition necessary for sitting for prolonged periods of time.