



Finance Analyst I Finance Analyst II

General Information

Classification Code:	MGTANL
Effective Date:	8/24/2020
Pay Grade:	C41 – C42
FLSA Status:	Exempt

Position Summary

The Finance Analyst reports to the Budget Officer and is assigned to support the operations of the Finance Department through financial reconciliations, data gathering and analysis, report development, financial research, and administrative support tasks within the Budget and Accounting Divisions.

Classification Characteristics

The Finance Analyst position falls under the Management Analyst classification. Management Analysts make process decisions and decide how to best achieve the objectives, standards or guidelines established at higher levels and may include supervision of lower level support staff or lead responsibilities. The Management Analyst is a broad professional classification that encompasses incumbents engaged in a wide range of analytical, research, budget management, and program management activities.

Finance Analyst I – Employees at this level generally have minimal professional experience and perform more day-to-day routine and reoccurring finance activities for which there are defined processes, procedures, instructions, models and precedents. Operates at the tactical and transactional levels. As experience is acquired, employees are expected to perform with increasing independence. This level requires a general knowledge of basic analytical processes and program knowledge and the ability to interpret a variety of data.

Finance Analyst II – This is the fully journey level in the Management Analyst series. The Finance Analyst II differs from the Finance Analyst I by the level of complexity, sensitive, independence, and the diversity of assignments. Employees assigned to this classification have full responsibility for a variety of diverse finance activities, including developing and/or refining policies, procedures and related items. Employees have also demonstrated the knowledge and the ability to deal independently with complex and sensitive issues; lead or manage small to mid-sized projects; they work independently with minimal supervision and receive only occasional instructions or assistance as new or unusual situations arise.

After an employee has been employed at the entry level in a flexibly staffed classification for a period of at least one (1) year, the employee may be advanced to the journey level subject to the following:

- The employee meets the minimum qualifications for the journey level.
- The employee is performing journey level duties at an acceptable level.

Essential Duties

The duties listed below are a typical sample; position assignments may vary.

Essential Duties	
1	Supports the annual City-wide audit process with tasks to include: financial reconciliations, yearend journal entries, recording miscellaneous financial transactions, gathering supporting documentation and completing reconciliations for work-papers and audit disclosures.
2	Creates, develops, reconciles and error-checks various reports, tables, text and data.
3	Coordinates financial analysis and process improvement projects and supports implementation of findings with direction provided by higher level staff to include gathering data from financial software(s), other city's budget documents and other industry sources; evaluating output of data gathering; researching best practices and examples from other jurisdictions; developing recommended options based on the analysis.
4	Conducts rate analysis and develops rate amounts for internal charges and other central service cost centers.
5	Supports revenue forecasting through the extraction of data from source systems, and the analysis of factors influencing revenue sources.
6	Works with departments to coordinate and monitor the supplemental budget process. Gathers, analyzes, and extracts data from multiple requests, forms and financial systems; compiles and compares data against adopted budget; consolidates data into financial tables; creates reports, documents, and text narratives for Council review; interprets data for compliance with public hearing requirements; updates financial systems with supplemental budget adjustments.
7	Supports the City's procurement program to include providing guidance to internal customers, assigning contract numbers, administration of scanned contracts and related materials, and interpreting State statutes, Municipal Code, and Administrative regulations.
8	Supports the annual Budget Committee meeting process to include meeting logistics, meals, meeting minutes, and other support activities.
9	Supports the administration of the City's budget software with tasks such as adding new employees to the system, managing G/L data within the software, creating and managing financial reports.
10	Updates text and files on the Finance Department's internal and external webpages.
11	Administers the City's purchase card program and purchaser authorization form process by issuing purchase cards, responding to issues and fraud alerts, assigning pin numbers and managing credit limits based on guidance from management.
12	Performs other duties of a similar nature or level.

Functional Specific Responsibilities
N/A

Qualifications
<p>Minimum Qualifications:</p> <ul style="list-style-type: none"> • <u>Finance Analyst I</u> – Bachelor's Degree in a related field and 0-2 years of relevant professional experience or an equivalent combination of education and experience. • <u>Finance Analyst II</u> – Bachelor's Degree in a related field and 2-5 years of relevant professional experience or an equivalent combination of education and experience.
<p>Licensing/Certifications:</p> <ul style="list-style-type: none"> • N/A

Qualifications

Technology Skills:

- Accounting software — Fund accounting software.
- Document management software – LaserFiche.
- Electronic mail software — Microsoft Outlook.
- Enterprise resource planning ERP software — PeopleSoft.
- Financial analysis software — Budget monitoring systems.
- Office suite software — Microsoft Office.
- Presentation software — Microsoft PowerPoint.
- Spreadsheet software — Microsoft Excel.
- Word processing software — Microsoft Word

Knowledge Required:

- **Economics and Accounting** — Knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.
- **Mathematics** — Knowledge of arithmetic, algebra, geometry, calculus, statistics, and their applications.
- **English Language** — Knowledge of the structure and content of the English language including the meaning and spelling of words, rules of composition, and grammar.
- **Administration and Management** — Knowledge of business and management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.
- **Clerical** — Knowledge of administrative and clerical procedures and systems such as word processing, managing files and records, stenography and transcription, designing forms, and other office procedures and terminology.
- **Law and Government** — Knowledge of laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules, and the democratic political process.
- **Customer and Personal Service** — Knowledge of principles and processes for providing customer and personal services. This includes customer needs assessment, meeting quality standards for services, and evaluation of customer satisfaction.

Skills:

- **Active Listening** — Giving full attention to what other people are saying, taking time to understand the points being made, asking questions as appropriate, and not interrupting at inappropriate times.
- **Reading Comprehension** — Understanding written sentences and paragraphs in work related documents.
- **Critical Thinking** — Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.
- **Mathematics** — Using mathematics to solve problems.
- **Speaking** — Talking to others to convey information effectively.
- **Complex Problem Solving** — Identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.
- **Judgment and Decision Making** — Considering the relative costs and benefits of potential actions to choose the most appropriate one.
- **Active Learning** — Understanding the implications of new information for both current and future problem-solving and decision-making.
- **Writing** — Communicating effectively in writing as appropriate for the needs of the audience.
- **Management of Financial Resources** — Determining how money will be spent to get the work done, and accounting for these expenditures.
- **Systems Analysis** — Determining how a system should work and how changes in conditions, operations, and the environment will affect outcomes.
- **Social Perceptiveness** — Being aware of others' reactions and understanding why they react as they do.
- **Time Management** — Managing one's own time and the time of others.

Qualifications

Abilities:

- **Mathematical Reasoning** — The ability to choose the right mathematical methods or formulas to solve a problem.
- **Number Facility** — The ability to add, subtract, multiply, or divide quickly and correctly.
- **Oral and Written Comprehension** — The ability to listen to and read and understand information and ideas presented through spoken and written words and sentences.
- **Deductive Reasoning** — The ability to apply general rules to specific problems to produce answers that make sense.
- **Oral and Written Expression** — The ability to communicate information and ideas in speaking and writing so others will understand.
- **Problem Sensitivity** — The ability to tell when something is wrong or is likely to go wrong. It does not involve solving the problem, only recognizing there is a problem.
- **Speech Clarity** — The ability to speak clearly so others can understand you.
- **Near Vision** — The ability to see details at close range (within a few feet of the observer).
- **Speech Recognition** — The ability to identify and understand the speech of another person.
- **Category Flexibility** — The ability to generate or use different sets of rules for combining or grouping things in different ways.
- **Selective Attention** — The ability to concentrate on a task over a period of time without being distracted.

Physical Requirements

Key										
	None 0% (0 hrs.)	Seldom 1-10% (Up to 1 hrs.)	Occasionally 11-35% (Up to 3 hrs.)	Frequently 36-75% (3-6 hrs.)	Continuous 76-100% (6+ hrs./day)					
	0%	1-10%	11-35%	36-75%	76-100%					
BODY POSITIONS						PUSH/PULL				
Standing		X				0-10 lbs.				
Sitting					X	11-20 lbs.				
Walking – Even Surface		X				21-50 lbs.				
Walking – Uneven Surface	X					51-75 lbs.				
Kneeling	X					76-100 lbs.				
MOVEMENTS						ENVIRONMENTAL HAZARDS				
Bending/Stooping		X				Indoors				
Twisting						Outdoors				
Crawling	X					Dust				
Squatting/Crouching	X					Fumes/Odors/Gasses				
Balancing	X					Chemical Agents				
Reach – Overhead	X					Biological Agents				
Reach – Forward		X				Noise – Low				
Reach – Backward	X					Noise – Moderate				
Climbing – stairs	X					Noise – High				
Climbing - ladder	X					Low Light				

Physical Requirements										
USE OF HANDS						Heat	X			
Grasping – whole hand		X				Cold	X			
Grasping – pinch grip			X			Restricted workspace	X			
Fine manipulation/feeling			X			Vibration – whole body	X			
Keyboarding				X		Vibration - extremity	X			
LIFT/CARRY						JOB SPECIFIC				
0-10 lbs.			X			Driving – vehicle/equipment		X		
11-20 lbs.		X				Operate foot controls			X	
21-50 lbs.	X					Seeing			X	
51-75 lbs.	X					Talking			X	
76-100 lbs.	X					Hearing			X	
						Extended work hours		X		

Classification History

August 24, 2020 – Created & Adopted

I have reviewed the job description.

Employee: Name _____ **Signature** _____ **Date** _____