



Career Service Authority

Page 1 of 4

Associate Financial Management Analyst

GENERAL STATEMENT OF CLASS DUTIES

Performs standard level professional work implementing and maintaining financial management-oriented projects whose direct impact is at least agency or department wide but not Citywide and/or implements and maintains a financial management function(s) - other than customary accounting and auditing services - whose direct impact is at least agency or department wide but not Citywide. (Some positions have management analysis responsibilities, including examining the costs and savings associated with recommended program or operational changes of studied agencies.)

DISTINGUISHING CHARACTERISTICS

This class is distinguished from the entry level in the Financial Management Analyst series - Staff Financial Management Analyst - by the performance of standard or intermediate performance level work. This class is distinguished from the Senior Financial Management Analyst class by the full performance or journey level work performed in that class. This class is also distinguished from classes in the professional Accountant and Auditor series, which describe customary transaction or audit-oriented professional accounting duties, and from the Agency Budget Analyst series, which describes agency representatives involved in coordinating within an agency the development of an agency's annual budget request and monitoring the expenditures of the agency's budget.

This class is also distinguished by the following factors:

Guidelines, Difficulty and Decision Making Level:

Guidelines are generally numerous, well established and directly applicable to the work assignment. Work assignment and desired results are explained by general oral or written instructions. Duties assigned are generally repetitive and restricted in scope but may be of substantial intricacy. Employee primarily applies standardized practices. Decisions or recommendations on non-standardized situations are limited to relating organizational policies to specific cases. Problems that are not covered by guidelines or are without precedent are taken up with the supervisor.

Level of Supervision Received and Quality Review:

Under normal supervision, within a standardized work situation, the employee performs duties common to the line of work without close supervision or detailed instruction. Work product is subject to continual review.

Interpersonal Communications and Purpose:

Contacts with the public or employees where explanatory or interpretive information is exchanged, gathered or presented and some degree of discretion and judgment are required within the parameters of the job function.

Level of Supervision Exercised:

By position, may perform project leadwork.

ESSENTIAL DUTIES

Implements financial management-oriented projects whose scope and impact is at least agency or department wide but not Citywide AND/OR implements and maintains an ongoing agency or department wide but not Citywide financial management function(s).

Implements and maintains financial management-oriented projects or a financial management function(s) primarily by applying standardized work practices under the guidance of general oral or written instructions.

Using guidelines that are well established and directly applicable to the work situation, relates organizational policies and practices to specific cases and takes up with the supervisor problems that are not covered by guidelines.

Exchanges explanatory and interpretive information requiring the exercise of discretion and judgment with the public, colleagues and agency leaders.

Interviews individuals, conducts investigations and performs other field work to collect and/or verify information and documents the findings.

Performs work assignments involving research, data interpretation, analysis, formulation of recommendations and both ad hoc and periodical report preparation.

Some positions assist and advise agencies in the development of their annual budget requests, make annual budget recommendations and monitor the expenditures of budgeted funds.

Some positions apply established procedures to implement projects which serve agency operational planning and budget management interests.

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Any one position may not include all of the duties listed.
However, the allocation of positions will be determined by
the amount of time spent in performing the essential duties
listed above.
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MINIMUM QUALIFICATIONS

Competencies, Knowledges & Skills:

Reading - Understands and interprets written material, including technical materials, rules, regulations, instructions, reports, charts, graphs or tables; applies what is learned from written material to specific situations.

Writing - Recognizes or uses English grammar, punctuation and spelling; communicates information in a succinct and organized manner; produces written information in a succinct and organized manner; produces written information, which may include technical material that is appropriate for the intended audience.

Reasoning - Identifies rules, principles or relationships that explain facts, data or other information; analyzes information and makes correct inferences or draws accurate conclusions.

Problem Solving - Identifies problems; determines accuracy and relevance of information; uses sound judgment to generate and evaluate alternatives and to make recommendations.

Technical Competence - Uses knowledge that is acquired through formal training or extensive on-the-job experience to perform one's job; works with, understands and evaluates technical information related to the job.

Knowledge of financial analysis techniques, including research techniques and analysis of operations and programs, sufficient to be able to perform the duty assignment.

Knowledge of mathematics sufficient to be able to perform a variety of calculations.

Skill in establishing and maintaining working relationships with both internal and external customers – other employees, organizations and the public.

Skill in independently identifying relevant written guidance and applying standard work practices to intricate but not unusual or problematic work assignments.

Physical Demands:

Sitting: remaining in the normal seated position.

Handling: seizing, holding, grasping or otherwise working with hand(s).

Fingering: picking, pinching or otherwise working with fingers.

Talking: expressing or exchanging ideas by means of spoken words.

Hearing: perceiving the nature of sounds by the ear.

Repetitive motions: making frequent movements with a part of the body.

Eye/hand/foot coordination: performing work through using two or more.

Working Environment:

Subject to many interruptions.

Education Requirement:

Baccalaureate degree in business administration, public administration, finance, economics, accounting or a related field.

Experience Requirement:

One year of professional experience in accounting, budget analysis, cash management, debt administration, portfolio administration, forecasting or financially related statistical analysis.

Education/Experience Equivalency:

A combination of the appropriate type and level of education and experience may be substituted for the minimum education and experience requirements.

Licensure and/or Certification:

None.

CLASS DETAIL

FLSA CODE: Exempt.

ESTABLISHED DATE: 09/16/1995

REVISED DATE: 03/01/2003
08/05/2007
08/19/2007

REVISED BY: Paul Wiberg

CLASS HISTORY

New class established in 12/2002. One former/existing class - Budget and Management Analyst - is replaced by this new class.
08/05/2007. Language of the education/experience requirement changed to provide more clarity.
08/19/2007. Some language in the education requirement and the experience requirement changed.