



Career Service Authority  
Financial Management Specialist

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### GENERAL STATEMENT OF CLASS DUTIES

Designs and directs the implementation of complex projects which affect the execution of Citywide financial management policies and practices and/or directs the implementation and ongoing execution of a centralized Citywide financial management function(s) - other than customary accounting and auditing services - such as debt administration, cash management and revenue forecasting. (Because of the Citywide influence of this work, Financial Management Specialist duty assignments will not be obtainable in many agencies.)

### DISTINGUISHING CHARACTERISTICS

This class is the specialist level in the Financial Management Analyst series. It is distinguished from the senior level in the series - Senior Financial Management Analyst- by the performance of advanced and specialized full performance level, Citywide work. Positions in this class direct a Citywide financial management function(s) and/or design and direct complex financial management-oriented projects which affect the execution of Citywide financial management policies and practices. (This class should not be regarded as an expectable progression from Senior Financial Management Analyst.) This class is also distinguished from classes in the Accountant and Auditor series, which perform customary transaction or audit-oriented professional accounting duties, and from the Agency Budget Analyst series. That series describes agency representatives involved in coordinating 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 in the form of stated objective only, with issues and factors largely undefined, requiring the employee to exercise creativity and ingenuity in devising criteria, techniques, strategy and methodologies for approaching assigned functions or projects. Duties performed involve concepts, theories and concrete factors to be evaluated and weighed, requiring a high degree of analytical ability, and independent judgment and decision making. Work assignment is generally unstructured and employee is responsible for organizing complex, varied and simultaneous coordination of several functions, programs or projects in various states of completion.

#### ***Level of Supervision Received and Quality Review:***

Under administrative supervision, the employee has personal accountability for carrying out an assigned function, program or project within the scope of established guidelines and objectives and is expected to resolve problems that arise in the normal course of the work. Completed work is generally reviewed for soundness of judgment, conclusion, adequacy and conformance to policy.

***Interpersonal Communications and Purpose:***

Contacts of a remedial nature involving the resolution of problems and where some degree of discretion and judgment are required in carrying out a major program and/or function of the organization.

***Level of Supervision Exercised:***

By position, may perform project or operational leadwork. May supervise professional and sub professional staff or contract employees.

**ESSENTIAL DUTIES**

Designs, develops and directs complex financial management-oriented projects in public policy, including financial analysis and strategic planning, whose scope and impact are Citywide and/or directs implementation and ongoing execution of a Citywide financial management function(s).

Devises criteria, techniques, strategies and methodologies to accomplish policy and financial management-oriented Citywide projects or to direct a Citywide financial management function(s).

Organizes complex financial management-oriented Citywide projects or manages a Citywide financial management function(s).

Explains City financial conditions, strategies and practices; obtains advice and negotiates working relationships with elected and appointed officials and the community.

Plans, coordinates and directs the execution of surveys or performs similar research and analyzes the results to recommend to City officials alternative strategic initiatives to current practices.

Performs analysis of complex problems in areas where special expertise or knowledge is required; selects methodologies, techniques and approaches to the acquisition of data and reporting results to City officials both orally and in writing.

Some positions design, direct and implement complex projects which serve Citywide financial management interests such as forecasting the City's revenues and setting policies and strategies for Citywide loss prevention and capital improvement programs.

Serves as a Citywide consultant relevant to concerns generated within the realm of the specialized assignment.

Some positions direct the debt, cash and investment management functions of the City.

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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 material, rules, regulations, instructions, reports, charts, graphs or tables; applies what is learned from written material to specific situations.

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

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

**Planning and Evaluation** - Organizes work, sets priorities, determines resource requirements; determines short- or long-term goals and strategies to achieve them; coordinates with other organizations or parts of the organization; monitors progress, evaluates outcomes.

**Project Management** - Plans, organizes, and directs all aspects of assigned projects, including their human and material resources, to achieve project objectives within agreed time, cost and performance parameters.

**Decision Making** - Makes sound, well-informed and objective decisions; perceives the impact and implications of decisions; commits to action, even in uncertain situations, to accomplish organizational goals; causes change.

Knowledge of the theory, principles and methods of financial management and City financial policies sufficient to be able to design, direct and implement complex projects or a major financial management function(s).

Knowledge of analysis and research techniques sufficient to be able to determine what information is needed, secure and analyze desired information and formulate logical recommendations.

Skill in exercising initiative, judgment and decision making in directing and meeting the objectives of Citywide financial management projects or a Citywide financial management function(s).

Skill in utilizing the principles and practices of effective and persuasive communication to elicit information, negotiate problem resolution and/or garner support for various programs.

Skill in establishing and maintaining effective working relationships with employees, various representatives of public and private entities, City government policy making bodies and the public.

### ***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:**

Three years of full performance level 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:** 03/01/2003

**REVISED DATE:** 08/05/2007  
08/19/2007

**REVISED BY:** Paul Wiberg

**CLASS HISTORY** New class established in 12/2002 to replace the following former/existing classes: Debt Administrator, Portfolio Administrator, Revenue Forecast Analyst and Senior Financial Analyst.  
08/05/07. Language of the education/experience requirement changed to provide more clarity.  
08/19/2007. Some language in the education and experience requirements changed.