



Career Service Authority

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Senior Financial Management Analyst

GENERAL STATEMENT OF CLASS DUTIES

Performs full performance level professional work to design, direct and implement 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 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 standard performance level in the Financial Management Analyst series - Associate Financial Management Analyst - by the performance of full performance or journey level work. This class is also distinguished from the Financial Management Specialist class, which performs advanced and specialized work designing and directing the implementation of complex projects which affect the execution of Citywide financial management policies and practices and/or directing the implementation and ongoing execution of a centralized Citywide financial management function(s). 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 expenditure of the agency's budget.

This class is also distinguished by the following factors:

Guidelines, Difficulty and Decision Making Level:

Guidelines are generally but not always clearly applicable, requiring the employee to exercise judgment in selecting the most pertinent guideline, interpret precedents, adapt standard practices to differing situations and recommend alternative actions in situations without precedent. Duties assigned are generally complex and may be of substantial intricacy. Work assignment is performed within an established framework under general instructions but requires simultaneous coordination of assigned functions or projects in various stages of completion. Employee is responsible for determining time, place and sequence of actions to be taken. Unusual problems or proposed deviations from guidelines, practices or precedents may be discussed with the supervisor before being initiated.

Level of Supervision Received and Quality Review:

Under general supervision, the employee receives assignments and is expected to carry them through to completion with substantial independence. Work is reviewed for adherence to instructions, accuracy, completeness and conformance to standard practice or precedent. Recurring work clearly covered by guidelines may or may not be reviewed.

Interpersonal Communications and Purpose:

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

Level of Supervision Exercised:

By position, may perform project or operational leadwork. May supervise subprofessional staff or contract employees.

ESSENTIAL DUTIES

Designs, directs and implements financial management-related projects, including financial analysis and performance analysis, whose scope and impact are at least agency wide but not Citywide AND/OR implements and maintains an ongoing Citywide financial management function(s).

Directs and implements assigned projects or implements and maintains a Citywide financial management function(s) by selecting among available policies, procedures and standard work methods those which are most clearly applicable; researches and recommends alternatives.

Explains and defends financially-related management studies and proposals.

Interviews individuals and conducts investigations; researches and collects data to obtain and/or verify information and documents the findings.

Performs a variety of work assignments simultaneously, determining and devising data collection and research techniques to be utilized and data interpretation, analytical methodology and reporting formats and structures to be employed.

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 design, direct and conduct projects and studies which serve agency operational planning and budget management interests.

Some positions provide management consulting services to assigned agencies including costs and savings/benefits analysis of specific programs and operations.

Some positions implement and maintain the City debt, cash or investment management functions, or similarly responsible financial management functions, under direction of an administrator.

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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 correct 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.

Self Management - Sets well-defined and realistic personal goals; displays a high level of initiative, effort and commitment towards completing assignments in a timely manner; works with minimal supervision; is motivated to achieve; demonstrates responsible behavior.

Information Management - Identifies a need for and knows where or how to gather information; organizes and maintains information or information management systems.

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.

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, including statistics, sufficient to be able to perform a variety of calculations.

Skill in independently adapting, interpreting and applying written guidelines, precedents and standardized work practices to a variety of unprecedented or problematic situations.

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 working relationships with both internal and external customers – other employees, organizations 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 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: Senior Budget and Management Analyst, Portfolio Analyst, Principal Statistical Analyst, Aviation Revenue Forecast Analyst and Financial Analyst.

08/05/2007. Language of the education/experience requirement changed to provide more clarity.

08/19/2007. Some language in the education and experience requirements changed.