



Career Service Authority

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Staff Financial Management Analyst

GENERAL STATEMENT OF CLASS DUTIES

Performs entry level professional work assisting in the implementation and maintenance of financial management-oriented projects whose direct impact is at least agency or department wide but not Citywide and/or assisting in the implementation and maintenance of a financial management functions(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 which assist in the examination of the costs and savings associated with recommended program or operational changes of studied agencies.)

DISTINGUISHING CHARACTERISTICS

This class is distinguished from the Associate Financial Management Analyst class by the performance of entry level work. 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:

No supervisory responsibilities.

ESSENTIAL DUTIES

Performs professional work assisting in the implementation of financial management-oriented projects whose scope and impact is at least agency wide but not Citywide AND/OR performs professional work assisting in the implementation and maintenance of an ongoing agency wide financial management function(s).

Performs training assignments which are primarily routine and restricted in intricacy using well established and well defined procedures, methods and techniques.

Gathers and exchanges factual information with colleagues and the public in rendering services according to established procedures.

As directed or requested, interviews individuals and conducts limited investigations, audits and other field work to collect and/or verify information and document the findings.

Performs work assignments involving research, data interpretation and analysis, preliminary recommendation and report preparation restricted through supervisory control by size, type, complexity and priority of the project.

Under close supervision, some positions assist and advise agencies in the development of their annual budget requests make annual budget recommendations and monitor the expenditure of budgeted funds.

Some positions apply established procedures to professionally assist implementation of 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:

Arithmetic - Performs computations such as addition, subtraction, multiplication and division correctly using whole numbers, fractions, decimals and percentages.

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.

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 correct conclusions.

Flexibility - Is open to change and new information; adapts behavior or work methods in response to new information, changing conditions or unexpected obstacles; effectively deals with ambiguity.

Interpersonal Skills - Shows understanding, courtesy, tact, empathy, concern; develops and maintains relationships; relates well to people from varied backgrounds and situations; is sensitive to individual differences.

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

Skill in interpreting and applying written guidelines, precedents and work practices to standardized work situations or specific cases.

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:

None.

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: Non exempt

ESTABLISHED DATE: 03/01/2003

REVISED DATE: 04/22/2007
08/05/2007
08/19/2007

REVISED BY: Steve Adkison, 04/22/2007
Paul Wiberg, 08/05/2007 and 08/19/2007

CLASS HISTORY New class established in 12/2002. No existing classes are replaced by it. Classification title was changed and was designated as non-exempt as a result of a City Attorney opinion.
08/05/2007. Language of the education/experience requirement changed to provide more clarity.
08/19/2007. Language of the education requirement changed.