



Code: 0135

Family: Accounting and Finance

Service: Administrative

Group: Clerical, Accounting, and General Office

Series: Accounting and Auditing

CLASS TITLE: SENIOR FINANCIAL ANALYST

CHARACTERISTICS OF THE CLASS

Under direction, performs complex financial analysis and oversees staff engaged in the analyses of fiscal/cost related data for City programs and services, and performs related duties as required

ESSENTIAL DUTIES

- Performs and oversees the conduct of research on current and historical revenues and expenditures, identifies trends, and prepares fiscal projections
- Performs in-depth analyses of debt, fiscal liabilities, and operational costs and prepares budget estimates
- Performs and oversees the conduct of cost/benefit analyses of current and proposed programs and recommends financial controls to improve cost efficiencies
- Develops computer models to analyze data and formulates rate structures and calculates various fees for departmental programs and services
- Coordinates and participates in audits of contractors to ensure the accuracy of billings and compliance with contract provisions
- Prepares audit reports and presents recommendations at post audit meetings
- Reviews bid proposals submitted by private contractors and identifies the most cost effective proposal
- Prepares and reviews fiscal reports
- May provide fiscal data relative to employee benefits costs during labor negotiations
- May train and coordinate the work of staff and private consultants in the conduct of special financial analyses projects

NOTE: *The list of essential duties is not intended to be inclusive; there may be other duties that are essential to particular positions within the class.*

MINIMUM QUALIFICATIONS

Education, Training, and Experience

- Graduation from an accredited college or university with a Bachelor's degree in Finance, Accounting, or a directly related field, plus three years of work experience in the analysis of financial records, or an equivalent combination of education, training and experience, provided that the minimum degree requirement is met.

Licensure, Certification, or Other Qualifications

- None

WORKING CONDITIONS

- General office environment

EQUIPMENT

- Standard office equipment (e.g., telephone, printer, photocopier, fax machine, calculator, adding machine)
- Computers and peripheral equipment (e.g., personal computer, computer terminals, hand-held computer)

PHYSICAL REQUIREMENTS

- No specific requirements

KNOWLEDGE, SKILLS, ABILITIES, AND OTHER WORK REQUIREMENTS**Knowledge**

Considerable knowledge of:

- *generally accepted accounting and auditing principles, methods, practices, and procedures
- *applicable computer software packages (e.g., accounting software, data management software) and applications (e.g., Oracle)
- *budget preparation and management methods, practices, and procedures
- *applicable financial analysis and reporting principles, methods, practices, and procedures

Moderate knowledge of:

- City tax ordinances and requirements
- *applicable mathematical principles and applications, including statistical analysis
- *financial management principles, methods, practices, and procedures

Knowledge of applicable City and department ordinances, policies, procedures, rules, regulations, and ordinances

Other knowledge as required for successful performance in the Financial Analyst class

Skills

- *ACTIVE LEARNING - Understand the implications of new information for both current and future problem-solving and decision-making
- *ACTIVE LISTENING - Give full attention to what other people are saying, taking time to understand the points being made, ask questions as appropriate, and not interrupt at inappropriate times
- *CRITICAL THINKING - Use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems
- *MATHEMATICS - Use mathematics to solve problems
- MONITORING – Monitor and assess performance of one's self, other individuals, or organizations to make improvements or take corrective action
- MANAGEMENT OF FINANCIAL RESOURCES - Determine how money will be spent to get the work done and account for these expenditures

Other skills as required for successful performance in the Financial Analyst class

Abilities

- COMPREHEND ORAL INFORMATION - Listen to and understand information and ideas presented through spoken words and sentences

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- SPEAK - Communicate information and ideas in speaking so others will understand
 - COMPREHEND WRITTEN INFORMATION - Read and understand information and ideas presented in writing
 - WRITE - Communicate information and ideas in writing so others will understand
 - CONCENTRATE - Concentrate on a task over a period of time without being distracted
 - REASON TO SOLVE PROBLEMS - Apply general rules to specific problems to produce answers that make sense
 - REASON MATHEMATICALLY - Choose the right mathematical methods or formulas to solve a problem
 - MAKE SENSE OF INFORMATION - Quickly make sense of, combine, and organize information into meaningful patterns
 - COMPARE AND RECOGNIZE DIFFERENCES - Quickly and accurately compare similarities and differences among sets of letters, numbers, objects, pictures, or patterns (includes comparing a presented object with a remembered object)
 - ORGANIZE INFORMATION - Arrange things or actions in a certain order or pattern according to a specific rule or set of rules (e.g., patterns of numbers, letters, words, pictures, mathematical operations)

Other abilities as required for successful performance in the Financial Analyst class

Other Work Requirements

- INITIATIVE - Demonstrate willingness to take on job challenges
- DEPENDABILITY - Demonstrate reliability, responsibility, and dependability and fulfill obligations
- ATTENTION TO DETAIL - Pay careful attention to detail and thoroughness in completing work tasks
- INDEPENDENCE - Develop own ways of doing things, guide oneself with little or no supervision, and depend mainly on oneself to get things done
- ANALYTICAL THINKING - Analyze information and using logic to address work or job issues and problems

Other characteristics as required for successful performance in the Financial Analyst class

All employees of the City of Chicago must demonstrate commitment to and compliance with applicable state and federal laws, and City ordinances and rules; the City's Ethics standards; and other City policies and procedures.

The City of Chicago will consider equivalent foreign degrees, accreditations, and credentials in evaluating qualifications.

* May be required at entry.

City of Chicago
Department of Human Resources
March, 2018