



**Code: 0139**

Family: Accounting and Finance

Service: Administrative

Group: Clerical, Accounting, and General Office

Series: Accounting and Finance

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## **CLASS TITLE: SENIOR FISCAL POLICY ANALYST**

### **CHARACTERISTICS OF THE CLASS**

Under general supervision, supervises professional staff engaged in assessing and reporting on the City's financial condition, and performs related duties as required

### **ESSENTIAL DUTIES**

- Assigns, supervises, and reviews the work of staff engaged in monitoring, analyzing, and reporting on the City's financial status
- Drafts comprehensive reports explaining variances and long-term trends relative to City revenues and expenditures
- Serves as liaison and provides oversight to private consultants, underwriters, re-marketing agents, and trustees participating in the bond issue process and participates in bond closings
- Recommends the issuance and re-marketing of general obligation bonds based on the analysis of market trends
- Reviews financial summaries (e.g., Comprehensive Accounting Financial Report, term sheets on development financings) and drafts narratives explaining findings and/or projected trends and patterns for inclusion in the Fiscal Economic Indicators Report
- Assists in the review of consultant reports and participates in the economic analyses of proposed tax increment financing (TIF) projects
- Coordinates the preparation of reports summarizing banking activity at participating financial institutions, evaluates their responsiveness to the City's needs, and makes recommendations for their use as official depositories
- Analyzes financial documentation and recommends banks to be used as municipal depositories based on solvency and in accordance with City policies
- Oversees the maintenance of computerized records and accounts of City tax payments and analyzes variances in actual and projected tax receipts
- Participates in meetings with department managers and representatives from financial institutions and government agencies to discuss fiscal trends and projections relative to new or expanded City initiatives
- Trains and coordinates training efforts on the economic analysis of municipal financial processes for professional level staff
- Develops work standards and conducts performance evaluations for subordinate staff
- Monitors budget and expenditures related to the division's budget and/or special projects or emergency fund accounts

**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, Economics, or a directly related field, plus four years of fiscal policy analysis experience, 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)
- Computers and peripheral equipment (e.g., personal computer, computer terminals, hand-held computer, modems)

#### **PHYSICAL REQUIREMENTS**

- No specific requirements

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

##### **Knowledge**

Considerable knowledge of:

- the bond market and processes involved in the issuance of municipal bonds
- generally accepted accounting principles, methods, practices, and procedures
- \*applicable financial analysis and management principles, methods, practices, and procedures
- applicable computer software packages (e.g., accounting software, financial software) and applications

Moderate knowledge of:

- organizational structure of City departments
- \*generally accepted fiscal policy principles, methods, practices, and procedures
- business trends

Some knowledge of:

- applicable federal, state, and local laws, regulations, and guidelines
- loan lending, underwriting, and processing principles, methods, practices, and procedures
- research methods and procedures

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

Other knowledge as required for successful performance in the Fiscal Policy 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, take 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
- LEARNING STRATEGIES - Select and use training/instructional methods and procedures appropriate for the situation when learning or teaching new things
- \*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
- \*COMPLEX PROBLEM SOLVING - Identify complex problems and review related information to develop and evaluate options and implement solutions
- \*MANAGEMENT OF FINANCIAL RESOURCES - Determine how money will be spent to get the work done and account for these expenditures
- \*TIME MANAGEMENT - Manage one's own time and the time of others
- \*COORDINATION WITH OTHERS - Adjust actions in relation to others' actions
- \*JUDGMENT AND DECISION MAKING - Consider the relative costs and benefits of potential actions to choose the most appropriate one

Other skills as required for successful performance in the Fiscal Policy Analyst class

### **Abilities**

- COMPREHEND ORAL INFORMATION - Listen to and understand information and ideas presented through spoken words and sentences
- 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
- 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)
- REACH CONCLUSIONS - Combine pieces of information to form general rules or conclusions (includes finding a relationship among seemingly unrelated events)

Other abilities as required for successful performance in the Fiscal Policy Analyst class

### **Other Work Requirements**

- DEPENDABILITY - Demonstrate reliability, responsibility, and dependability and fulfill obligations

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- 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 Fiscal Policy Analyst class

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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.

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City of Chicago  
Department of Human Resources  
(Valtera Corporation)

Date: June, 2010