



City of Kansas City, Missouri Job Class Specification

Job Title: FINANCIAL ANALYST

Department: FINANCE

Job Code: 1678

Status: EXEMPT

Grade: EX-5

Summary

This position involves highly responsible work in the Finance Department involving the planning, directing and coordinating of Citywide financial projects or managing operations, budget preparation and administration and review of departments and programs.

Work involves responsibility for varied and complex assignments requiring skills in financial management and analysis, quantitative and qualitative research, budget development and administration, and ensuring the efficiency of systems, policies and procedures. Duties include responsibility for planning procedures; gathering, organizing and analyzing data and reporting results, providing training and technical assistance to less experienced staff and carrying out the assignments. An employee in this class works with limited supervision and is responsible for the use of initiative and judgment in establishing procedures, processes, controls and carrying out various assignments to improve and enhance City operations. Work is reviewed through periodic conferences, review of reports and supporting work papers and observation.

Duties and Responsibilities

- Plans and supervises training programs for less experienced staff in budget administration, systems and procedures, research and organization and management analysis.
- Supervises and participates in the conduct of continuous revenue and expenditure studies and projections; supervises the preparation of analysis reports.
- Collects and analyzes cost data and other information to evaluate efficiency and procedures and makes recommendations to promote effective and economic operations.
- Reviews project proposals, establishes work plans and determines time frames, funding limitations and procedures for accomplishing project, determines staffing requirements and allotments to various phases of project.
- Contracts with and coordinates project activities of external consultants and interdepartmental work teams and with other projects; establishes and maintains effective client relationships.
- Manages the preparation of presentations, analyses, policy manuals and other projects.
- Manages the preparation of forecasts, schedules, annual billings, ordinances, fact sheets, accounting documents, project descriptions, spreadsheets, presentation graphics, oral and written reports to senior staff, external customers and other city departments.
- Understands and applies statistical techniques (econometric modeling, present value, regression analysis, time series, etc.) to assist in problem solving.
- Provides interpretations of bond document covenants, federal, state and local statutes, accounting principles and IRS provisions.

Duties and Responsibilities (cont.)

- Plans for the implementation and maintenance of reporting systems, portfolio maintenance, billing and reimbursement.
- Makes recommendations and manages implementation of recommendations, if required, for business and process improvements for the collection of taxes owed.
- Performs related duties as required.

Technical Skills

Thorough knowledge of:

- The principles, practices and techniques of administration and management, including but not limited to budgeting, management controls, accounting systems, and contract administration.
- The systems used for accounting, banking, billing and collections, cashiering, debt and investment portfolio management, financial reporting, development analysis, and tax and fee collection.
- The theories, principles, practices of municipal organizations and management.
- Organization and management analysis techniques.
- Missouri statutes, charter provisions and ordinance requirements governing the administration of municipal government and related administrative processes.
- Principles and practices of planning, interviewing, data collection and analysis, research and evaluation.

Considerable knowledge of:

- The organization, programs, and operations of municipal departments.
- Software programs that will enhance productivity, data analysis, system monitoring, and data validation; including, but not limited to, Microsoft Office productivity and data analysis tools.

Ability to:

- Plan, assign and supervise subordinate personnel engaged in research activities, reporting systems development and financial modeling and budget preparation; including, but not limited to, personnel at the level of Analyst or Senior Analyst.
- Prioritize and manage multiple tasks.
- Lead in a team environment, building coalitions, alliances from cross representational members to form consensus and produce results.
- Plan and oversee projects from beginning to end, including determining objectives, selecting activities to meet those objectives, and establishing and meeting time schedules.
- Collect, organize, and analyze data and other information to evaluate compliance, efficiency and effectiveness.
- Organize, prepare, review, and present effective oral and written recommendations and reports.
- Make evaluations and recommendations involving complex and varied economic and financial considerations.
- Collect, organize and analyze data for reporting, systems development and modeling.
- Establish and maintain effective working relationships with other employees, municipal officials and the general public.

Education and Experience Accredited Master's degree in public or business administration, urban or regional planning, economics, organizational/development psychology, project management/or geography; and two (2) years professional experience of a progressively responsible nature in corporate or municipal finance including but not limited to accounting, banking, billing and collections, debt and investment portfolio management, financial reporting, development review, and projecting and monitoring tax and fee activities, including one (1) years' experience managing financial projects and/or programs.

OR

Accredited Bachelor's degree and four (4) years professional experience of a progressively responsible nature in corporate or municipal finance including but not limited to accounting, banking, billing and collections, debt and investment portfolio management, financial reporting, development review, and projecting and monitoring tax and fee activities, including one (1) years' experience managing financial projects and/or programs.

**Certificates/
Licenses/Special
Requirements**

None

**Supervisory
Responsibility**

Supervision is exercised over professional, paraprofessional, and clerical personnel.

**Supervision
Received**

Work is performed under general supervision with considerable latitude for the exercise of independent judgment.

Note: This job description should not be construed to imply that these requirements are the exclusive standards of the position. Incumbents will follow any other instructions, and perform any other related duties, as may be required. Reasonable accommodation will be provided to qualified individuals with disabilities. The City of Kansas City has the right to revise this job description at any time. The job description is not to be construed as a contract for employment.

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