

FINANCIAL SERVICES ANALYST CLASSIFICATION DESCRIPTION

Job Classification Title:	Financial Services Analyst		
FLSA Status:	Exempt	Pay Grade:	13
EEO-1:	2	EEO-4:	1
<i>This job classification description is intended to be generic in nature and not an exhaustive list of all duties and responsibilities. The specific tasks/duties may vary based on position assignment and as determined by the Town of Queen Creek.</i>			

JOB CLASSIFICATION SUMMARY

Positions assigned to this class are responsible for performing routine budget, financial and accounting duties. Incumbents are required to understand, interpret and apply the principles, standards and practices of governmental accounting, auditing, budgeting, and financial reporting. Incumbents must understand governmental financial systems and the flow of transactions between systems in order to extract and manipulate data for required reports.

DISTINGUISHING CHARACTERISTICS

This is an intermediate level professional classification in the financial services job family. Work is designed to provide continued professional work experience, training and development and is focused on the use of specific knowledge of routine functional area to meet requirements and/or performance specifications within assigned discipline. Works independently referring complex issues to more senior professionals.

ESSENTIAL DUTIES

The following are intended to describe core work functions of this classification. While the level and broad nature of essential duties may not change, specific work tasks will vary over time depending on the Town's needs.

- Maintains accounting records including ledgers, journals, registers, and individual accounts; classifies and codes revenues and expenditures for entry into appropriate accounting records.
- Prepares journal entries and reconciliation reports; maintains, updates, and reconciles a variety of financial data.
- Generates concise and comprehensive reports and assists with analyzing and interpreting various system reports, e.g., utility billing data, cash receipt records, customer payments.
- Audits, reviews, and verifies accounting and other transactions and reconciliations to ensure accuracy; corrects financial records as necessary; may perform regular audits of cash drawers and petty cash funds.
- Develops, implements, and monitors performance measures in conjunction with internal and other Town departments.
- Assists departments with regular reporting of performance measures and related objectives in relation to the Town's Corporate Strategic Plan.
- Prepares updates to the Corporate Strategic Plan in coordination with departments and the Town Manager's Office.
- Provides recommendations for improvements to financial processes and practices.

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- Analyzes a variety of financial-related issues; accurately and effectively communicates findings and conclusions; recommends innovative solutions, including cross-divisional problem solving; researches and resolves problems and provides assistance to applicable internal and external stakeholders; prepares and presents written financial reports and forecasts, including but not limited to, variance analysis, delinquent accounts, and short and long-term projections.
- Manages the annual 'write-offs' report of all uncollectable funds for the assigned division or department.
- Recommends and writes policies and procedures to document and update departmental practices in assigned areas;
- Performs technical work ensuring the proper billing of utility accounts by conducting data audits and reviews related to utility accounts, services, bill codes, tax codes, and parcels.
- Analyzes and provides statistical data and implements processes to improve business operations and recommends and assists in the development and implementation of new programs, policies and procedures.
- Assists with the preparation of special reports including conducting analysis and researching discrepancies; participates in year-end closing processes.
- Conducts financial and budget planning and analysis.
- Performs related work as assigned.

MINIMUM QUALIFICATIONS (at job entry)

Education and Experience:

Bachelor's Degree from an accredited college or university in Accounting, Finance, or a related field and 2 years of journey-level, related experience; or an equivalent combination of directly related education and experience.

LICENSING/CERTIFICATION REQUIREMENTS

- None

KNOWLEDGE

- Municipal accounting, budgeting, and reconciliation principles and practices;
- Financial report preparation;
- Statistical analysis principles and practices;
- Research methods and techniques;
- Internal control principles and practices;
- Applicable Federal, state and local laws, codes, ordinances, rules and regulations;
- Standard office equipment including the computer and programs relevant to the performance of applicable duties and responsibilities;
- Customer service principles.

SKILLS

- Conducting research, analysis, and reconciliations;

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- Interpreting and summarizing detailed information;
- Preparing complex financial reports, documentation, and training materials;
- Interpreting and applying applicable Federal, state and local laws, codes, ordinances, rules and regulations;
- Managing projects;
- Tabulating, recording, and balancing transactions;
- Performing mathematical and statistical calculations;
- Using computers and related software applications;
- Providing customer service;
- Maintaining confidentiality and exercising good judgment in handling sensitive information;
- Operating standard office equipment;
- Communication and interpersonal skills as applied to interaction with coworkers, supervisor, the general public, and other interested parties sufficient to exchange or convey information and to receive work direction.

CLASS HISTORY INFORMATION

Created: 2/2022

Amendments: 5/2023

FINANCIAL SERVICES ANALYST PHYSICAL & ENVIRONMENTAL FACTORS

OVERALL PHYSICAL STRENGTH DEMANDS:

Physical Strength for this classification is indicated below with an "X"	
X	Sedentary: Exerting up to 10 lbs. occasionally or negligible weights frequently; sitting most of the time.
	Light: Exerting up to 20 lbs. occasionally, 10 lbs. frequently, or negligible amounts constantly OR requires walking or standing to a significant degree.
	Medium: Exerting 20-50 lbs. occasionally, 10-25 lbs. frequently, or up to 10 lbs. constantly.
	Heavy: Exerting 50-100 lbs. occasionally, 10-25 lbs. frequently, or up to 10-20 lbs. constantly.
	Very Heavy: Exerting over 100 lbs. occasionally, 50-100 lbs. frequently, or up to 20-50 lbs. constantly.

PHYSICAL DEMANDS:

C Continuously 2/3 or more time	F Frequently 1/3 to 2/3 of time	O Occasionally Up to 1/3 time	R Rarely < 1 hour per week	N Never Never occurs
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Note: This is intended as a description of the way the job is currently performed. It does not address the potential for accommodation.

Physical Demand	Brief Description	C	F	O	R	N
Standing	Communicating with co-workers, observing work site, observing work duties			X		
Sitting	Desk work	X				
Walking	To other departments/offices/office equipment			X		
Lifting	Supplies, files				X	
Carrying	Supplies, files				X	
Pushing/Pulling	File draws, tables and chairs			X		
Reaching	For supplies, for files		X			
Handling	Paperwork		X			
Fine Dexterity	Computer keyboard, telephone pad, calculator, calibrating equipment	X				
Kneeling	Filing in lower drawers, retrieving items from lower shelves/ground				X	
Crouching	Filing in lower drawers, retrieving items from lower shelves/ground				X	
Crawling	Under equipment				X	
Bending	Filing in lower drawers, retrieving items from lower shelves/ground				X	
Twisting	From computer to telephone, getting inside vehicles				X	
Climbing	Stairs, step stool				X	
Balancing	On step stool				X	
Vision	Reading, computer screen, driving	X				
Hearing	Communicating with co-workers and public and on telephone, listening to equipment	X				
Talking	Communicating with co-workers and public and on telephone	X				
Foot Controls	Driving				X	
Other (Specify)						

**FINANCIAL SERVICES ANALYST
PHYSICAL & ENVIRONMENTAL FACTORS**

MACHINES, TOOLS, EQUIPMENT, SOFTWARE AND HARDWARE:

Standard office equipment; vehicle

ENVIRONMENTAL FACTORS:

D Daily	W Several Times Per Week			M Several Times Per Month			S Seasonally	N Never				
Health & Safety Factors	D	W	M	S	N	Health & Safety Factors	D	W	M	S	N	
Mechanical Hazards					X	Respiratory Hazards					X	
Chemical Hazards					X	Extreme Temperatures					X	
Electrical Hazards					X	Noise and Vibration					X	
Fire Hazards					X	Wetness/Humidity					X	
Explosives					X	Physical Hazards					X	
Communicable Diseases				X								
Physical Danger or Abuse					X							
Other (Specify Below												

PROTECTIVE EQUIPMENT REQUIRED:

None

NON-PHYSICAL DEMANDS:

C Continuously 2/3 or more time	F Frequently 1/3 to 2/3 of time	O Occasionally Up to 1/3 time	R Rarely < 1 hour per week	N Never Never occurs				
Description of Non-Physical Demands				C	F	O	R	N
Time Pressure					X			
Emergency Situation								X
Frequent Change of Tasks					X			
Irregular Work Schedule/Overtime					X			
Performing Multiple Tasks Simultaneously					X			
Working Closely with Others as Part of a Team					X			
Tedious or Exacting Work					X			
Noisy/Distracting Environment							X	
Other (Specify Below)								



**FINANCIAL SERVICES ANALYST
PHYSICAL & ENVIRONMENTAL FACTORS**

PRIMARY WORK LOCATION:

X	Office Environment
	Warehouse
	Shop
	Recreation/Neighborhood Center
	Vehicle
	Outdoors
	Combination of Office, Vehicle and Field
	Other (Specify Below)

**FINANCIAL SERVICES ANALYST
ACKNOWLEDGEMENT****SIGNATURE – REVIEW AND COMMENTS:**

I have reviewed this description and find it to be an accurate representation of the demands of the classification.

Signature of Employee

Date

Job Title of Supervisor

Signature of Supervisor

Date

Job Title of Department Head

Signature of Department Head

Date

Comments: _____

The above statements are intended to describe the general nature and level of work being performed by individuals assigned to this position. They are not intended to be an exhaustive list of all responsibilities, duties, and skills required. This description is subject to modification as the needs and requirements of the classification change.