

FINANCIAL ANALYST

DISTINGUISHING FEATURES OF THE CLASS: An incumbent in this class is responsible for performing the duties and responsibilities of a financial analyst for Ulster County. Work is performed under the general direction of the designated Department Head or as directed by the Department Head and such incumbent will act as a confidential advisor and researcher for the County Department on special assignments. The incumbent may be responsible for working under the supervision of the Budget Officer and/or Commissioner of Finance on special projects. In this role, an incumbent of this class is responsible for analyzing financial trends affecting the debt and cash management activities of Ulster County, and is responsible for a full range of budgetary analysis, entry and monitoring. This position may be responsible for assisting with legislative relations, public affairs and constituent services. Depending on assignment, the incumbent may work independently or as a member of a management analysis team. Considerable leeway is allowed for the exercise of independent judgment. Does related work as required.

TYPICAL WORK ACTIVITIES: The typical work activities listed below, while providing representative examples of the variety of work assignments in the title do not describe any individual position. Incumbents in this title may perform some or all of the following, as well as other related activities not described.

Carries out special research projects, as assigned, relating to current public issues or County operations, identifying ramifications, restrictions, impact and interpretation which might influence the decision making process;

Reviews, analyzes and makes recommendations on the funding of County programs;

Monitors the expenditure of approved resources for effective and efficient utilization;

Performs in-depth organizational studies related to departmental issues, programs and operations;

Performs complex financial analysis by building financial models with multiple variables in order to project and track costs;

Assesses financial impact, cost issues, budgetary compliance or other cost/benefit implications of various initiatives;

Authors and edits all budget and financial reports as assigned;

May assist the Budget Office in reviewing and analyzing the operating and capital expenditures in the departments' annual County Budget submissions;

Monitors departmental financial activity, including trust accounts, special funds and grants, as requested or assigned;

Maintains effective working relationships with key administration officials as may be appropriate in the areas of Finance and Budget in order to obtain a comprehensive view of any project or matter assigned;

May review program issues identified through various sources, such as Department of Finance audit reports, departmental reports, and budget in-depth studies;

Develops methods and procedures to research and find successful solutions to problems;

Monitors compliance with approved expenditure and revenue plans by periodically reviewing activity;

Drafts news releases, newsletters, memoranda, power point presentations, social media posts and other types of documents needed for public outreach and education;

Researches and responds to constituent requests and complaints.

FULL PERFORMANCE KNOWLEDGES, SKILLS, ABILITIES AND PERSONAL CHARACTERISTICS: Thorough knowledge of practice and procedures used in governmental accounting and auditing, financial analysis and control; good knowledge of the structure of local government and of the function of its various departments and units; good understanding of County budgeting, organization and operating procedures and practices; good knowledge of laws, rules and regulations pertaining to government budgeting, fiscal management and general administration; good knowledge of Microsoft Office programs, including excel and word; ability to prepare detailed written narrative and statistical reports; strong proficiency in writing; ability to prepare and analyze financial reports for presentation to others, analyze public issues and their financial impact; ability to read, understand and edit complex written material including laws, rules, regulations, flow charts, tables of organization; ability to conduct and conduct research; ability to express oneself clearly and concisely, orally and in writing; ability to make detailed budget and operational analyses; ability to establish and maintain effective working relationships with Federal, State and Municipal officials and employees; good judgment; initiative; physical condition commensurate with the demands of the position.

MINIMUM QUALIFICATIONS: Either:

- A. Graduation from a New York State registered or regionally accredited college or university with a Master's degree in Business, Public Administration, Accounting, Economics or Political Science or closely related field and one (1) year of experience in public accounting, government budgeting, general management and/or financial control or Marketing; **OR**
- B. Graduation from a New York State registered or regionally accredited college or university with a Bachelor's degree in Business, Public Administration, Accounting, Economics or Political Science or closely related field and three (3) years experience in public accounting, government budgeting, general management and/or financial control or Marketing; **OR**
- C. Graduation from a New York State registered or regionally accredited college or university with an Associate's degree in Business, Public Administration, Accounting, Economics or

Political Science or closely related field and five (5) years experience in public accounting, government budgeting, general management and/or financial control or Marketing; **OR**

D. An equivalent combination of training and experience as indicated above.

ULSTER COUNTY

3145 FIN ANLYS

Classification: Proposed Non-Competitive

3146 FN AN HLP

Classification: Non-Competitive

MGT

Adopted: June 6, 2013

Revised: July 17, 2014

Revised: January 23, 2018

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