

## FINANCIAL ANALYST/PLANNER SERIES

Code No.	Class Title	Occ. Area	Work Area	Prob. Period	Effective Date
4787	Financial Analyst/Planner	01	593	6 mo.	09/01/21
4788	Financial Analyst/Planner Specialist	01	593	6 mo.	09/01/21
4789	Financial Analyst/Planner Supervisor	01	593	6 mo.	09/01/21

**Promotional Line: 334**

### Series Narrative

Employees in this series provide analyses, plans, and program evaluation studies intended to improve institutional decision making as it relates to the efficient use of financial and other resources. In their work the employees apply advanced analytical techniques; financial, economic, and decision-support theory; and long-range, comprehensive perspectives. Their work may apply to all organizational levels and time frames, but it tends to support senior or middle management in strategic and operational activities, particularly as they affect middle- and long-term financial conditions. All levels of this series require professional-level skills in financial analysis, planning techniques, data modeling, aggregate data analysis, decision-support techniques, and computer system development and usage. The higher levels are distinguished by the complexity and wide ranges of the analyses performed and are involved in the management of the unit's analytical projects.

### DESCRIPTIONS OF LEVELS OF WORK

#### **Level I: Financial Analyst/Planner**

**4787**

Employees at this level apply analytical skills to a limited range of financial applications. They work under the general direction of a designated supervisor(s).

A Financial Analyst/Planner typically:

1. performs simple financial analyses as specified by higher level staff: collects source information, analyzes data according to the most appropriate quantitative or qualitative methods, and prepares reports of findings;
2. supports institutional or departmental management by performing research and analysis to assist planning projects;
3. performs simple program evaluation studies, assessing the efficiency or resource-allocation decisions: following approved methodologies, compares original program objectives to actual performance; determines causes of performance lags and develops improvement options;
4. performs, tests, and implements financially oriented computer programs and data models in accordance with system specifications and departmental procedures, including the preparation of computer programs and datasets, the acquisition and refining of inputs, and the specification of desired outputs and interfaces; documents application systems, including system support procedures and user materials;

5. maintains and enhances existing analytical databases and automated data models, including the review, assessment, and solution of system problems and the specification and development of required changes;
6. provides training to beneficiaries of studies, ensuring their understanding and appropriate utilization of the research products: develops appropriate documentation and study guides; demonstrates analyses and findings in both formal and informal settings;
7. performs other related duties as assigned.

**Level II: Financial Analyst/Planner Specialist****4788**

Employees at this level apply analytical skills in a wide variety of non-routine planning, analytical, and evaluative applications and in model developments. These individuals serve as project leaders and may provide supervision to lower level analysts. They work under the general direction of a designated supervisor(s).

A Financial Analyst/Planner Specialist typically:

1. performs non-routine financial analyses, planning projects, program evaluation studies, and computer-based modeling projects; these are characterized by reliance upon sophisticated, often novel, methodologies and applications;
2. serves as project leader on assigned projects: establishes work plans and time schedules; supervises day-to-day activities of lower level staff as required, ensuring that they perform according to pre-established plans;
3. prepares project specifications for analytical, planning, evaluative, and system-related projects: reviews project needs to determine information needs; develops study approaches, methodologies, and product designs; works with management and professional staff in the user departments to ensure that work products reflect their informational need;
4. provides input into the development of budgets; provides analytical support for long-term and short-term departmental budgets and outcomes;
5. prepares necessary reports as required;
6. reviews policies, procedures, and guidelines and makes recommendations;
7. trains staff regarding analytical techniques, data sources, and approved study approaches associated with assigned projects;
8. develops new analytical procedures, methods, and applications for use by staff;
9. oversees development and maintenance of web pages;
10. performs duties of the lower level;
11. performs other related duties as assigned.

**Level III: Financial Analyst/Planner Supervisor****4789**

Employees at this level develop, direct, and/or perform all manner of analytical and planning functions in support of managerial decision making. The employees supervise professional analyst groups, including the coordination of project teams. They employ sophisticated analytical techniques and resources in the performance of the most complex of projects. They work under the general direction of a designated administrator(s).

A Financial Analyst/Planner Supervisor typically:

1. supervises a professional level section organized to perform the university's/agency's financial analysis, planning, evaluation, and financial modeling projects: assigns projects to project leaders, coordinating their efforts; plans, assigns, and reviews work activities and final products;
2. performs the most complex financial analyses, planning projects, program evaluation studies, and computer-based modeling projects assigned to the unit; typically these projects require the development of new techniques and applications; they frequently are characterized by their significant institutional impact;
3. assists university/agency management in determining the overall financial analysis agenda: supports management in assessing emerging areas of fiscal concern and in identifying appropriate studies to assist in management of these conditions;
4. aids management in applying financial analysis results to all manner of resource allocation decisions: provides technical advice and analytical support;
5. manages system contracts and provides recommendations regarding terms of renewal;
6. participates in budget preparations as assigned;
7. develops plans and manages data migration, including determining data to be migrated and managing schedules;
8. delivers timely monthly, quarterly, and annual financial reporting materials;
9. establishes policies, procedures, and guidelines to govern the unit's performance of analytical projects; monitors effectiveness of current policies and procedures and their impact on departmental financial success; ensures compliance with all applicable federal and state regulations and University policies and procedures;
10. performs duties of the lower level(s);
11. performs other related duties as assigned.

**MINIMUM ACCEPTABLE QUALIFICATIONS REQUIRED FOR ENTRY INTO:****Level I: Financial Analyst/Planner****4787****CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER**

1. Any one or combination totaling four (4) years (48 months) from the categories below:

- a. college coursework comparable to that in a field related to financial analysis/planning such as accounting, business administration, economics, finance, statistics, or a closely related field
  - 30 semester hours equals one (1) year (12 months)
  - Associate Degree (60 semester hours) equals eighteen (18) months
  - 90-semester hours equals two (2) years (24 months)
  - Bachelor's Degree (120 semester hours) equals three (3) years (36 months)
- b. work experience in developing financial or economic analyses, research designs, strategic plans, or data models

#### KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge and experience in preparation and analysis of various financial reports.
2. Knowledge of federal, state and university policies including accounting practices.
3. Knowledge of financial system and its relationship and interactions with other systems both internally and externally, and of the technologies affecting financial operations.
4. Knowledge of Cash Management processes and formulas.
5. Knowledge of principles and processes providing customer/client and personal services.
6. Skill in written, oral and interpersonal communication.
7. Ability to develop and maintain various computer modules.
8. Ability to motivate, promote teamwork, lead, make decisions based on sound judgments.
9. Ability to prioritize tasks and functions.
10. Ability to work independently to accomplish goals.
11. Ability to design and implement solutions to complex problems.
12. Ability to analyze and interpret complex accounting records and to develop and present financial analyses in a comprehensive format.

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#### **Level II: Financial Analyst/Planner Specialist**

**4788**

#### CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or combination totaling four (4) years (48 months) from the categories below:
  - a. college coursework comparable to that in a field related to financial analysis/planning such as accounting, business administration, economics, finance, statistics, or a closely related field

- 30 semester hours equals one (1) year (12 months)
  - Associate Degree (60 semester hours) equals eighteen (18) months
  - 90-semester hours equals two (2) years (24 months)
  - Bachelor's Degree (120 semester hours) equals three (3) years (36 months)
- b. work experience in developing financial or economic analyses, research designs, strategic plans, or data models
2. One (1) year (12 months) of professional level progressively responsible financial work experience.
- \*NOTE: A Master's Degree in an area consistent with the duties of the position may be substituted for one (1) year (12 months) of work experience.

#### KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge and experience in preparation and analysis of various financial reports.
2. Knowledge of federal, state and university policies including accounting practices.
3. Knowledge financial system and its relationship and interactions with other systems both internally and externally, and of the technologies affecting financial operations.
4. Knowledge of Cash Management processes and formulas.
5. Skill in written, oral, and interpersonal communication.
6. Skill in assessing performance of other individuals, or organizations/institutions to make improvements or take corrective action.
7. Ability to develop and maintain various computer modules.
8. Ability to motivate, promote teamwork, lead, make decisions based on sound judgments.
9. Ability to prioritize tasks and functions.
10. Ability to work independently to accomplish goals.
11. Ability to design and implement solutions to complex problems.
12. Ability to supervise lower-level workers and projects.

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#### **Level III: Financial Analyst/Planner Supervisor**

**4789**

#### CREDENTIALS TO BE VERIFIED BY PLACEMENT OFFICER

1. Any one or combination totaling four (4) years (48 months) from the categories below:

- a. college coursework comparable to that in a field related to financial analysis/planning such as accounting, business administration, economics, finance, statistics, or a closely related field
    - 30 semester hours equals one (1) year (12 months)
    - Associate Degree (60 semester hours) equals eighteen (18) months
    - 90-semester hours equals two (2) years (24 months)
    - Bachelor's Degree (120 semester hours) equals three (3) years (36 months)
  - b. work experience in developing financial or economic analyses, research designs, strategic plans, or data models
2. Two (2) years (24 months) of professional level progressively responsible financial work experience, of which one (1) year (12 months) must have included supervisory or functional oversight experience.
- \*NOTE: A Master's Degree in an area consistent with the duties of the position may be substituted for one (1) year (12 months) of work experience.

#### KNOWLEDGE, SKILLS AND ABILITIES (KSAs)

1. Knowledge of economic and accounting principles and practices, and the analysis and reporting of financial data.
2. Knowledge of laws, legal codes, court procedures, precedents, government regulations, executive orders, agency rules and the political process.
3. Knowledge of business management principles involved in strategic planning, resource allocation, human resources modeling, leadership technique, production methods, and coordination of people and resources.
4. Skill in identifying complex problems and reviewing related information to develop and evaluate options and implement solutions.
5. Skill in written, oral and interpersonal communication.
6. Ability to self-start, manage multiple tasks and deadlines, and prioritize tasks and functions.
7. Ability to supervise lower-level workers and projects.
8. Ability to motivate, promote teamwork, lead, make decisions based on sound judgments.