

**TOWN OF GILBERT  
CLASS SPECIFICATION  
Fiscal Analyst**

<u>CLASS SERIES</u>	<u>BAND/GRADE/SUBGRADE</u>	<u>FLSA STATUS</u>
Fiscal	C41 – C42	Exempt

**CLASS SUMMARY:**

This class is the third level in the Fiscal series. Incumbents are responsible performing professional level work for an assigned financial program and/or operational area, ensuring compliance with applicable codes, rules, regulations and laws. Responsibilities may include: preparing financial, regulatory and forecasting reports; analyzing and auditing financial information; maintaining databases; preparing forecasts; monitoring regulatory compliance; and, training internal staff on automated systems.

**ESSENTIAL DUTIES:**

*This class specification represents only the core areas of responsibilities; specific position assignments will vary depending on the needs of the department.*

**PERCENT OF  
TIME**

Actively participates and accomplishes organizational, departmental and workgroup goals and objectives.	Daily 100%
Exhibits a service orientation toward internal and external customers and maintains productive working relationships.	Daily 100%
May supervise staff to include: prioritizing and assigning work; conducting performance evaluations; ensuring staff is trained; ensuring that employees follow policies and procedures; maintaining a healthy and safe working environment; and, making hiring, termination, and disciplinary recommendations.	Varies 0 – 20%
Prepares financial documents, exhibits, summaries, journal entries, and spreadsheets. May oversee the preparation, calculation and entry of accounting information. Submits reports to departments, external agencies, or other applicable parties. Ensures documents, entries and activities are compliant with applicable standards, formats, principles, codes and regulations.	Daily 20%
Reviews general ledger and program-related accounting information and reconciles accounts, reports, and transactions. Maintains and updates general ledger accounts, program files and databases. Ensures data integrity.	Daily 20%
Responds to questions and requests for information for assigned financial area. Provides guidance and training on policies, procedures and regulations. Researches and resolves problems. May serve as liaison to other departments in support of assigned area.	Daily 15%

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As assigned, may coordinate fiscal month-end or year-end activities in assigned area, grant administration and reporting activities, the preparation of budget-related information, or other applicable activities.	Monthly 10%
Performs other duties of a similar nature and level as assigned.	As Required

**TRAINING AND EXPERIENCE:**

Bachelor's Degree and three years of experience in assigned area of responsibility; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

**LICENSING/CERTIFICATIONS:**

Depending on area of assignment, requires:

- CPA
- CFE
- CPPB
- CPPO

**KNOWLEDGE OF:**

- Generally Accepted Accounting Principles and Auditing Standards;
- Applicable Federal, state and local laws, codes, regulations, and/or ordinances;
- Automated financial systems and spreadsheet software;
- Research methods;
- Modern office equipment.
- Supervisory principles, practices and techniques;

**SKILL IN:**

- Conducting critical analyses;
- Conducting research;
- Reconciling accounts;
- Preparing complex financial reports and documentation;
- Coordinating fiscal activities;
- Interpreting and applying applicable laws, codes, regulations, and standards;
- Utilizing a computer and relevant software applications;
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to receive work direction.
- Supervising, monitoring and evaluating staff;

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#### **ADA AND OTHER REQUIREMENTS:**

Positions in this class typically require: reaching, standing, walking, lifting, fingering, talking, hearing, seeing and repetitive motions.

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

#### **WORKING TITLES WITHIN CLASS SPECIFICATION:**

Accounting System Analyst – C41

Accountant – C41

Tax Compliance Analyst – C41

Senior Accountant – C42

#### **NOTE:**

*The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the business needs of the department.*

#### **CLASS HISTORY INFORMATION:**

*Draft prepared by Fox Lawson & Associates LLC (BS)*

*Date: (10/12)*

*Draft finalized by Gilbert Human Resources (TT)*

*Date: (05/13)*