

**CLASS SPECIFICATION**  
**Housing Assistant Financial Analyst**

FLSA Status: Exempt  
Union Representation: AFSCME – Housing

**GENERAL PURPOSE**

Under general supervision, performs assigned professional financial, budgetary, statistical and other management analyses in support of City and Portland Housing Bureau activities, functions and programs; assists in budget development and implementation; and performs related duties as assigned.

**NOTE: This classification is used exclusively in the Portland Housing Bureau (PHB).**

**DISTINGUISHING CHARACTERISTICS**

Housing Assistant Financial Analysts perform professional analytical and management support work assignments ranging from routine to moderate difficulty or support others in performing more complex analytical work in support of the PHB budget, financial and other programs, goals and objectives. Initially, incumbents perform assignments while learning City and Bureau policies and procedures and specific techniques and legal requirements related to their assigned functional area. As experience is gained, duties are performed with a significant degree of independence while still under general supervision. Incumbents are expected to carry out their responsibilities with initiative and creativity, exercising sound professional judgment and problem-solving skills.

Housing Assistant Financial Analyst is distinguished from Housing Financial Analyst in that incumbents in the latter class independently perform more difficult and varied analytical work, on assignments having greater impact on Bureau operations or City programs and the exercise of greater independent judgment and initiative.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

Any one position in this class may not perform all the duties listed below, nor do the listed examples of duties include all similar and related duties that may be assigned to this class.

1. Performs financial, budget, management, policy and legislative analysis assignments in accordance with guidance and instructions given regarding approach and expected results; uses appropriate analytical techniques and statistical and information-gathering processes to obtain required information; performs analyses and summarizes findings; studies and makes recommendations on assigned projects; prepares reports; assists in developing and implementing program or functional goals and objectives.
2. Performs analytical and administrative assignments in connection with preparation and management of Bureau budgets; with direction, performs financial analyses of budget proposals; calculates

revenues and expenditures and investigates and analyzes policies and procedures to identify issues and opportunities.

3. Assists in monitoring and reviewing expense/revenue entries for appropriate account classification and to prevent overspending; prepares budget variance reports, including for Budget Monitoring Process Report.
4. Explains budget guidelines to Bureau and division managers and supervisors; reviews requests to ensure they comply with established guidelines.
5. Assists in preparing monthly financial reports; maintains integrity of the internal budget and accounting system.
6. Assists in reconciling year-end fund balance reports and forecasting multi-year revenues and expenditures at project and program level.
7. Develops and utilizes spreadsheets, databases and other computer applications to assist with assigned studies, projects and reports.

#### **OTHER DUTIES**

1. Performs a variety of special projects as assigned.
2. Develops or assists in developing grant applications; monitors grantee performance to ensure conformance with program requirements.

#### **MINIMUM QUALIFICATIONS**

##### **Knowledge of:**

1. Principles and practices of public administration.
2. Principles, practices, methods and techniques of financial analysis.
3. Principles, practices and methods of municipal budget development and administration.
4. Principles and practices of sound business communication.
5. Standard business software, particularly as related to statistical analysis and data management.

##### **Ability to:**

1. Analyze financial, budgetary, operational, and organizational problems, evaluate alternatives and reach sound, logical, fact-based conclusions.
2. Collect, evaluate and interpret data, either in statistical or narrative form.

3. Analyze, interpret, explain and apply relevant laws, regulations, ordinances and policies.
4. Prepare clear, concise and comprehensive reports, correspondence and other documents appropriate to the audience.
5. Communicate effectively, orally and in writing.
6. Maintain files, records and documentation.
7. Exercise independent judgment and initiative within established guidelines.
8. Establish and maintain effective working relationships with bureau managers and staff, staff of other bureaus, representatives of other governmental agencies, the public and others encountered in the course of work.

**Training and Experience:**

A typical way of obtaining the knowledge, skills and abilities outlined above is graduation from a four-year college or university with a major in business or public administration, finance or a closely related field; or an equivalent combination of training and experience. Experience in a public agency is preferred.

**PHYSICAL AND MENTAL DEMANDS**

Persons with disabilities may be able to perform the essential duties of this class with reasonable accommodation. Reasonable accommodation will be evaluated on an individual basis and depend, in part, on the specific requirements for the job, the limitations related to disability and the ability of the hiring bureau to accommodate the limitation.

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**Class History:**

Adopted: 04-27-11

This class is composed of positions from the following class:

30000566 Assistant Financial Analyst

Adopted: 07-01-02