

| REASON FOR THIS POSITION | | |
|--------------------------|--|--------------------------|
| 1. NEW | 2. IDENTICAL ADDITION TO THE ESTABLISHED PD NUMBER | 3. REPLACES PD NUMBER |
| <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

**POSITION DESCRIPTION
COVER SHEET**

| | | | |
|--|-------------------|----------------|-------------------------|
| RECOMMENDED | | | |
| 4. Job Title Financial Analyst | | | |
| 5. PAY PLAN GS | 6. SERIES 1160 | 7. GRADE 13 | |
| 8. INCUMBENT (OPTIONAL) Financial Analyst | | | 9. INCUMBENT (OPTIONAL) |

| | | | | | | |
|--------------------------------|--------------------|----------|-----------------|---------------------|--|------------------------------|
| OFFICIAL | | | | | | |
| 10. TITLE Financial Analyst | | | | | | |
| 11. PP GS | 12. SERIES 1160 | 13. FUNC | 14. GRADE 13 | 15. DATE 8/29/97 | 16. I/A <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO | 17. CLASSIFIER <i>JRS</i> |

| | |
|--|--------------------|
| 18. ORGANIZATIONAL STRUCTURE (Agency/Bureau) | |
| Assistant Secretary for Public and Indian Housing | 5th Program Center |
| General Deputy Assistant Secretary for Public and Indian Housing | 8th |
| 3rd Director, Field Operations Staff | 7th |
| 4th Director, Field Office | 8th |

| | | | |
|---|----------|---|----------|
| SUPERVISOR'S CERTIFICATION | | | |
| I certify that this is an accurate statement of the major duties and responsibilities of the position and its organizational relationships and that the position is necessary to carry out Government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds and that false or misleading statements may constitute violations of such statute or their implementing regulations. | | | |
| 19. SUPERVISOR'S SIGNATURE | 20. DATE | 22. SECOND LEVEL SUPERVISOR'S SIGNATURE | 23. DATE |
| <i>[Signature]</i> | | <i>Cheryl Teninga</i> | 8/15/97 |
| 21. SUPERVISOR'S NAME AND TITLE Director Field Office | | 24. SECOND LEVEL SUPERVISOR'S NAME AND TITLE Cheryl Teninga, Director Field Operations Staff | |

| FACTOR EVALUATION SYSTEM | | | | | |
|--------------------------|-------------|------------|------------------------|-------------|------------|
| FACTOR | 25. FLD/BMK | 26. POINTS | FACTOR | 25. FLD/BMK | 26. POINTS |
| 1. Knowledge Required | | | 6. Personal Contacts | | |
| 2. Supervisory Controls | | | 7. Purpose of Contacts | | |
| 3. Guidelines | | | 8. Physical Demands | | |
| 4. Complexity | | | 9. Work Environment | | |
| 5. Scope and Effect | | | TOTAL POINTS | | |

Financial Analyst Series GS 1160-6/97 GRADE 13

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|--|----------|
| CLASSIFICATION CERTIFICATION | |
| I certify that this position has been classified as required by Title 5, US Code, in conformance with standards published by the OPM or, if no published standard applies directly, consistently with the most applicable published standards. | |
| 29. SIGNATURE | 30. DATE |
| <i>Charles C. Anderson</i> | 8/29/97 |
| 31. NAME AND TITLE Pers. Mgmt Spec | |
| 33. OPM CERTIFICATION NUMBER | |

#000009

**FINANCIAL ANALYST
OFFICE OF PUBLIC HOUSING
GS-1160-13**

INTRODUCTION:

The Financial Analyst is located either in the HUB Field Office or Program Center or Section 8 Management Center. The incumbent serves as the principal advisor for financial matters relating to the Public Housing Agencies (PHA). The Financial Analyst provides expertise on matters relating to financing and financial management of PHA programs. Responsibilities include review and approval of program budgets, reservation and obligation of funds, scheduling of payments, preparation of contracts, review and approval of financial or year end statements, generation of appropriate financial transactions, resolution of audit findings related to the financial management of PHAs; analyzing data to keep abreast of program compliance and performance operations; serving as a member of any team to assist in developing appropriate solutions to complex issues and problems identified by either remote monitoring or information provided by the Assessment Center; and providing expert advice and guidance on complex issues.

DUTIES AND RESPONSIBILITIES:

1. The Financial Analyst serves as a technical expert for all public and assisted housing programs in areas such as:

- Cash management
- Budget and fiscal controls
- Accounting records
- Investments and Cash in bank
- Internal records

2. The Financial Analyst assesses the performance of the PHAs in the areas of finance and budget for both Low Rent Public Housing and Section 8 programs, using budgets and applicable amendments, quarterly requisitions, tenants accounts receivable reports, and financial statements.

3. Participates in team efforts to conduct targeted compliance assessments of specific PHA's in depth reviews of such areas as:

- 24 CFR 85-36
- Annual Contribution Contracts
- Internal Controls Requirements
- Single Audit Act

Takes action to either correct compliance violations by developing tailored training packages, information dissemination etc., or recommending that potentially severe compliance issues be referred to the Inspector General.

4. Participates in regular team meetings to assess Finance issues and trends across the

jurisdiction of the office. Participates, as assigned/required on special project teams, to address and resolve issues that cross functional program lines.

5. Assists the Office Director, subordinate supervisor or Team Leader in monitoring and evaluating Management or performance Plan goals, including input and feedback into the development and analysis of diagnostic data. Monitors and tracks accomplishment as assigned and provides input into the Management Plan reports, analyzes reports submitted on shortfalls, clarifies issues, resolves problems relating to goals achievement.
6. Monitors compliance of all PHA's in the financial area e.g., sufficiency of operating reserves, designated check signatories, and adequate timekeeping procedures. Works with other financial analysts to identify financial trends and coordinates as necessary with cross-functional experts to develop strategies for dealing with these broad trends.
7. Provides technical assistance to assigned housing authorities by responding to questions, and identifying technical assistance needs and assisting in the development of tailored packages to address those needs using strategies such as peer-to-peer networks and developing accounting systems and cash handling procedures.
8. Develops analytical papers as assigned.
9. Trains lower graded financial analysts and other Public Housing Staff.
10. Develops appropriate strategies, tools and procedures to address identified performance deficiencies and problem-solving.
11. Takes action to either correct compliance and performance violations by developing tailored training packages, information dissemination, etc, or recommending that potentially severe compliance issues be referred to the Inspector General.
12. Works with financial analyst counterparts in analyzing Assessment Center scores/data for all housing authorities and identifying trends, and developing material on e.g., financial management issues, regulatory guidance matters, and program changes for dissemination to the PHA's.
13. Explores non-HUD sources of technical assistance (e.g., non-profits, universities, etc.), and facilitates effective partnerships between HUD residents and PHA management.
14. Prepares and submits various special statistical, programmatic and administrative region-wide written reports, evaluations, plans and strategies for the Office/Center, as applicable, (on problems, issues, budgets, training need assessment, travel and most effective utilization of resources.
15. Utilizes available computer equipment and data systems to maintain current PHA data, track PHA performance trends and compliance issues, and generate appropriate work products.
16. Serves as agency representative at local, regional, state and other conferences, seminars, workshops, etc., on Finance and Budget issues and topics with oral and written presentations.
17. Directly provides advice and guidance on situations for PHA's on unique situations. Also

provides advice and guidance to PHA's on unique cases which have not been previously encountered and for which there are no national procedures or experience.

18. Assists in the control, monitoring, sub-assignment and oversight of allocations of development, grant, modernization and subsidy funding for the Office/Center.

19. Processes special requests, waivers, controlled correspondence and other correspondence as assigned.

20. Reviews budget requests, requisitions, and year-end statements for assigned authorities.

21. Participates in assignments involving resolution of audit findings, and review of CIAP applications, PHMAP appeals and certifications, Resident Initiative grant applications, and Demo/Dispo/Conversion requests.

22. If the incumbent is assigned to the HUB Field Office or Program Center, they serve as liaison to the Section 8 Management Center, for geographic area or programs assigned.

Factor 1, Knowledge Required by the Position

A mastery of the rules, regulations and statutes pertaining to the financial management or funding aspect of all public and assisted housing programs administered by PHAs. A mastery of the oversight process in order to effectively analyze and administer PHA financial operations. Knowledge of trends in pertinent PIH programs in order to develop realistic intervention strategies and to provide management and staff in the HUB field offices or Program Centers with information upon which to develop solutions to any significant downward performance trends developing at non-troubled PHAs.

Factor 2, Supervisory Controls

The position is under the general supervision of the Director, Section 8 Management Center, or Director HUB Field Office or subordinate supervisor. Assignments are given in general terms and the incumbent is expected to ordinarily perform with little technical guidance or assistance within Office/Center and Departmental rules, regulations and guidelines. Work is generally reviewed for technical accuracy or appropriateness and to assure achievement of objectives with overall policies.

The incumbent develops deadlines and project requirements through analysis of PHA performance data, coordination with cross-functional teams involved with PHA-specific issues/problems, and the specific needs of the PHAs. The incumbent is considered an authority on financial and budget issues related to housing authorities, and is expected to provide expert advisory assistance and exercise judgement in developing solutions to complex problems whether on an individual basis or as a member of a team.

Factor 3, Guidelines

Guidelines include legislative statutes, Departmental regulations and HUD-PHA contractual agreements.

Factor 4, Complexity

Work involves performing reviews and analysis of financial documents submitted by PHAs. Also involves performing sometimes complex reviews and analysis of PHAs identifying operational and programmatic deficiencies and develops appropriate strategies for dealing with.

Factor 5, Scope and Effect

The work involves receiving and reviewing financial and funding documents and making a determination of their accuracy and completeness. As a result of incumbent's recommendations, the amount and timing of funding to PHAs is affected. Work also involves interaction with other HUD specialists or generalists in the HUB Field Office, Program Center or other Management Centers on cross cutting issues or problems related to the Low Rent Public Housing and Section 8 programs.

Factor 6, Personal Contacts

Contacts are with employees in HUB Field Offices, Program centers, Management Centers, Headquarters, staff at the PHA or resident organizations. Such contacts are usually established on an irregular basis, inside and outside of the agency.

Factor 7, Purpose of Contacts

The purpose is to exchange information or clarify questions related to programmatic or Departmental policies to PHA staff, interested citizens or other HUD employees. In addition, the incumbent may be called upon to influence or persuade local housing officials to accepted revised or modified schedules and plans or policy and technical requirements.

Factor 8, Physical Demands

The work is usually sedentary and involves sitting comfortably to accomplish most tasks. No special physical demands are required.

Factor 9, Work Environment

The work involves normal risks or discomforts associated with working in an adequately lighted and ventilated office environment.

POSITION CLASSIFICATION STANDARDS

FES EVALUATION STATEMENT

Title, Series, and Grade Financial Analyst, GS-1160-13

Organization PIH, Field Office Program Center

Position # _____

| Evaluation Factors | Points Assigned | Standards Used (Bmk #, FL#, etc) | Comments |
|---------------------------------------|------------------|----------------------------------|---------------------|
| 1. Knowledge Required by the Position | 1550 | 1-8 | |
| 2. Supervisory Controls | 450 | 2-4 | |
| 3. Guidelines | 450 | 3-4 | |
| 4. Complexity | 325 | 4-5 | |
| 5. Scope and Effect | 225 | 5-4 | |
| 6. Personal Contacts | 75 | 6-4 | |
| 7. Purpose of Contacts | 120 | 7-3 | |
| 8. Physical Demands | 5 | 8-1 | |
| 9. Work Environment | 5 | 9-1 | |
| S U M M A R Y | Total Points | 3205 | GS-13 = 3155 - 3600 |
| | Grade Conversion | 13 | |