

City of Allentown  
Position Description

Class Title: Pension and Financial Analyst  
Grade Number: 12N (Exempt)  
Department: Finance  
Bureau: Finance  
Union: No

GENERAL PURPOSE

General Liaison for the administration of the City's pension program.

Performs a variety of support of the City's annual budget by performing specialized accounting duties.

Performs a variety of professional specialized accounting work of a varied nature.

SUPERVISION RECEIVED

Works under the supervision of the Director of Finance and Deputy Director of Finance.

SUPERVISION EXERCISED

May exercise supervision over clerical staff as required.

ESSENTIAL DUTIES AND RESPONSIBILITIES

Receives information relevant to pending retirees and military buyback requests.

Performs all retiree and disability pension benefit calculations and military buyback calculations.

Performs relevant customer service and coordination to guide prospective retirees, active retirees, the Unions, Human Resources, Payroll, department heads and middle management, the Pension Boards, and the Pennsylvania Municipal Retirement System, through the City's pension administration process.

Performs periodic audits of pension payouts to spot check for errors, and coordinates curing any errors discovered.

Maintains financial reports on the state of retiree pensions for use by the administration and makes recommendations for the improvement of the pension administration process.

Ensures that the City's administrative code is cohesive with collective bargaining contracts and the Pennsylvania Third Class City Code and participates in the legislative process of eliminating any tension between these sources of authority.

Participates in audits of the City's pension funds by the Office of the Inspector General.

Assists Deputy Finance Director in the preparation of the monthly financial reports and analysis of complex financial statements and reports as directed.

Performs special accounting duties for the preparation of the annual budget.

Completes the debt schedules, summary pages, personnel pages, and other items as necessary for the preparation of the proposed and final budget books.

Serves as the department liaison for budget related processes.

Conducts quarterly meetings with the department to review budget vs. actual.

Completes budget transfers for departments.

Creates detailed reports for HR department regarding personnel changes.

Reconciles all City's Bank accounts.

Completes Capital Reports quarterly filings.

Conducts Cash Flow Analysis.

Conducts Deficit Forecasting.

Plans and arranges work priorities for self, based on general assignments, projects and deadlines for completion as requested/provided by supervisor.

Position involves extensive contact with City bureaus and external auditors to provide or explain non-routine information relating to the City's financial system.

Applies a working knowledge of applicable laws and regulations; verifies documents for completeness and compliance with government agencies.

Analyzes budget patterns, projects, revenue, expenditures, and makes recommended changes as needed.

Attends meetings (including Pension Board meetings) as required.

Analyzes and reports research findings in clear, complete, and logical form.

Demonstrates continuous effort to improve operations, decrease turnaround times, streamline work processes, and work cooperatively and jointly to provide quality seamless customer service.

Under direction of the Deputy Finance Director performs City liaison duties for special financial projects as needed.

Performs related work as may be required.

### DESIRED MINIMUM QUALIFICATIONS

#### Education and Experience:

- (A) Bachelor's degree in Finance, accounting, statistics, or related field; and
- (B) Five years' experience in governmental budgetary and finance activities, preferably some of which shall have been in governmental or public accounting; or an
- (C) Equivalent combination of related education and experience.

#### Necessary Knowledge, Skills and Abilities:

- (A) Knowledge of principals, methods, and practices of municipal finance, accounting and budget preparation.
- (B) Ability to perform arithmetic calculations rapidly and accurately.
- (C) Ability to prepare calculations in report format by using electronic spreadsheet software, and to analyze and interpret financial statements\reports.
- (D) Ability to produce written documents with clearly organized thoughts using proper English sentence construction, punctuation and grammar.
- (E) Communicate orally with customers, clients, public using telephone and in a face-to-face and one-to-one setting.
- (F) Work cooperatively with other employees and the public.
- (G) Exercises administrative judgment and assumes responsibility for decisions, consequences, and results having an impact on people, costs, and/or quality of service within the functional area.
- (H) Ability to utilize the city's local area network, electronic mail, Windows operating programs, and other software programs.

### TOOLS AND EQUIPMENT USED

Requires intensive daily use of personal computer utilizing various software programs and spreadsheets; calculator, and telephone.

### PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

While performing the duties of this job, the employee is constantly required to sit and talk or hear. The employee is required to walk; use hands to finger, handle, or feel objects, tools, or controls; and reach with hands and arms.

The employee must occasionally lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision and the ability to adjust focus.

### WORK ENVIRONMENT

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

The noise level in the work environment is usually quiet.

### SELECTION GUIDELINES

Formal application, rating of education and experience; oral interview and reference check; job related tests may be required.

The duties listed above are intended only as illustrations of the various types of work that may be performed. The omission of specific statements of duties does not exclude them from the position if the work is similar, related or a logical assignment to the position.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.