



**Code: 1437**

Family: Accounting and Finance

Service: Administrative

Group: Statistical, Technical, and Mercantile

Series: Planning

## **CLASS TITLE: FINANCIAL PLANNING ANALYST - EXCLUDED**

### **CHARACTERISTICS OF THE CLASS**

Under direction, performs financial planning and economic analyses for commercial, industrial, and residential private development projects that require the use of public funds, and performs related duties as required

### **ESSENTIAL DUTIES**

- Performs financial analysis of proposed development projects by reviewing applications and evaluating the financial feasibility of projects, the amount of public funds required, and the economic benefits to the public sector
- Makes recommendations regarding the City's participation in private development projects to stimulate investment in designated areas
- Coordinates the processing of loans to businesses, working with business and bank representatives to determine loan eligibility and negotiating the financial structure of loans
- Manages the technical process of establishing a tax increment financing (TIF) redevelopment area or district by ensuring the preparation of required consultant reports and by preparing documents for use by advisory review boards
- Negotiates redevelopment agreements detailing the terms of the project, including the financing mechanism for the City's payment of eligible costs
- Coordinates the implementation of redevelopment projects, overseeing the acquisition of land parcels and the coordination of activities with other City agencies and with other projects within a development district
- Monitors activities of ongoing development projects by reviewing financial documents and approving payments for eligible costs to ensure public funds are properly expended
- Meets with community and local elected officials to explain and promote proposed redevelopment projects in their communities and obtain their support
- Represents the department at various public hearings, special task forces, or other committee meetings to give presentations and explain and discuss financial planning and development projects, as required
- Coordinates with other sections of the department to conduct various reviews (e.g., architectural, construction, compliance) to ensure plans and activities are in accordance with the City's plans and policies

**NOTE:** *The list of essential duties is not intended to be inclusive; there may be other duties that are essential to particular positions within the class.*

### **MINIMUM QUALIFICATIONS**

#### **Education, Training, and Experience**

- Graduation from an accredited college or university with a Bachelor's degree in Finance, Business Administration, Accounting, Real Estate, Urban Planning, or a directly related field, PLUS three (3) years of experience in financial analysis; **OR**

- Graduation from an accredited college or university with a Master's degree or higher in Finance, Business Administration, Accounting, Real Estate, Urban Planning, or a directly related field, PLUS two (2) years of experience in financial analysis

**Licensure, Certification, or Other Qualifications**

- None

**WORKING CONDITIONS**

- General office environment

**EQUIPMENT**

- Standard office equipment (e.g., telephone, printer, photocopier)
- Computers and peripheral equipment (e.g., personal computer)

**PHYSICAL REQUIREMENTS**

- No specific requirements

**KNOWLEDGE, SKILLS, ABILITIES, AND OTHER WORK REQUIREMENTS****Knowledge**

Advanced knowledge of:

- the bond market and processes involved in the issuance of municipal bonds
- generally accepted accounting principles, methods, practices, and procedures
- \*applicable financial analysis and management principles, methods, practices, and procedures
- applicable computer software packages (e.g., accounting software, financial software) and applications

Considerable knowledge of:

- \*generally accepted fiscal policy principles, methods, practices, and procedures
- business trends

Moderate knowledge of:

- applicable federal, state, and local laws, regulations, and guidelines
- loan lending, underwriting, and processing principles, methods, practices, and procedures

Some knowledge of:

- City tax ordinances and requirements
- generally accepted auditing principles, methods, practices and procedures
- grant administration policies, methods, practices, and procedures
- budget preparation and management methods, practices, and procedures

Knowledge of applicable City and department ordinances, policies, procedures, rules, regulations, and ordinances

**Skills**

- \*ACTIVE LEARNING - Understand the implications of new information for both current and future problem-solving and decision-making

- \*ACTIVE LISTENING - Give full attention to what other people are saying, taking time to understand the points being made, ask questions as appropriate, and not interrupt at inappropriate times
- \*CRITICAL THINKING - Use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems
- \*MATHEMATICS - Use mathematics to solve problems
- \*COMPLEX PROBLEM SOLVING - Identify complex problems and review related information to develop and evaluate options and implement solutions
- \*MANAGEMENT OF FINANCIAL RESOURCES - Determine how money will be spent to get the work done and account for these expenditures
- NEGOTIATION - Bring others together and trying to reconcile differences
- \*JUDGMENT AND DECISION MAKING - Consider the relative costs and benefits of potential actions to choose the most appropriate one

### **Abilities**

- COMPREHEND ORAL INFORMATION - Listen to and understand information and ideas presented through spoken words and sentences
- SPEAK - Communicate information and ideas in speaking so others will understand
- COMPREHEND WRITTEN INFORMATION - Read and understand information and ideas presented in writing
- WRITE - Communicate information and ideas in writing so others will understand
- REASON TO SOLVE PROBLEMS - Apply general rules to specific problems to produce answers that make sense
- REASON MATHEMATICALLY - Choose the right mathematical methods or formulas to solve a problem
- COME UP WITH IDEAS - Come up with a number of ideas about a topic
- MAKE SENSE OF INFORMATION - Quickly make sense of, combine, and organize information into meaningful patterns
- COMPARE AND RECOGNIZE DIFFERENCES - Quickly and accurately compare similarities and differences among sets of letters, numbers, objects, pictures, or patterns (includes comparing a presented object with a remembered object)
- ORGANIZE INFORMATION - Arrange things or actions in a certain order or pattern according to a specific rule or set of rules (e.g., patterns of numbers, letters, words, pictures, mathematical operations)
- REACH CONCLUSIONS - Combine pieces of information to form general rules or conclusions (includes finding a relationship among seemingly unrelated events)

### **Other Work Requirements**

- INITIATIVE - Demonstrate willingness to take on job challenges
- LEADERSHIP - Demonstrate willingness to lead, take charge, and offer opinions and direction
- DEPENDABILITY - Demonstrate reliability, responsibility, and dependability and fulfill obligations
- ATTENTION TO DETAIL - Pay careful attention to detail and thoroughness in completing work tasks

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- **INDEPENDENCE** - Develop own ways of doing things, guide oneself with little or no supervision, and depend mainly on oneself to get things done
  - **ANALYTICAL THINKING** - Analyze information and using logic to address work or job issues and problems
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All employees of the City of Chicago must demonstrate commitment to and compliance with applicable state and federal laws, and City ordinances and rules; the City's Ethics standards; and other City policies and procedures.

The City of Chicago will consider equivalent foreign degrees, accreditations, and credentials in evaluating qualifications.

\* May be required at entry.

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City of Chicago  
Department of Human Resources  
September, 2024; May, 2025