



**POSITION DESCRIPTION**

<b>JOB TITLE: Performance Specialist (Forecast Analyst)</b> Job Class:	
<b>DATE</b>	Office of Accountability and Efficiency
<b>BARGAINING UNIT:</b>	<b>FLSA STATUS:</b> <input checked="" type="checkbox"/> <b>Exempt</b> <input type="checkbox"/> <b>Non exempt</b>
<b>Pay Schedule:</b> <b>Pay Range:</b> \$	<b>Management Approval:</b>
<b>POSITION SUMMARY and PURPOSE:</b>  Analyzes and forecasts district's long-term financial capabilities and sustainability. Provides detailed analysis regarding Board actions and calculates projected cash flows/shortfalls based upon assumptions and trends. Responsible for planning and maintaining procedures and policies that enable optimum efficiency of employees and resources. Responsible for managing department personnel including the hiring, evaluation, and work assignment processes for the office's analyst team.	

**ESSENTIAL FUNCTIONS:** Indicate the approximate percentage of time devoted to each major task or group of related tasks. Summarize position in no more than 15 tasks, each of which requires at least 5% of incumbent's time.

- NOTE:** An essential function must meet the following criteria:
- 1) The reason the position exists is to perform that function,
  - 2) No other employee is available to perform that function,
  - 3) The function is highly specialized, and
  - 4) Removing the function would fundamentally alter the job.

1. Provides integrated statistical forecasting modeling, including forecast model maintenance and business collaboration, to enhance decision-making in the areas regarding School Operations, Nutrition, Categorical, Transportation, and Construction Funds.
2. Capitalizes on existing trends and identifies developing trends to generate, modify and/or enhance forecast methodology and results.
3. Performs fiscal viability analysis utilizing SWOT (Strengths, Weaknesses, Opportunities, and Threats), KPI (Key Performance Indicators) and gap analysis.
4. Utilizes advanced software to develop and calculate ROI (Return on Investment), WACC (Weighted Average Cost of Capital), expected cash flows and/or cost-benefit analysis for all Board and Administrative decisions and presents findings to Chief Accountability and Efficiency Officer (CAEO).
5. Applies visual presentation skills and business understanding to communicate findings and forecast updates to the CAEO, Chief Finance Officer, and Board of School Directors in an effective manner which allows for clear understanding of reports to be utilized to drive sustainability across the district.
6. Reports independent recommendations regarding financial policies to the Board of School Directors.

7. Reviews fiscal and budgetary policies to ensure adequate internal controls for accurate financial reporting.
8. Maintains a thorough understanding of Federal, State, and City statutes regarding tax, debt, and fiscal codes to accurately update forecasts assumptions as needed.
9. Manages department personnel including the hiring, evaluation and work assignment processes for the office's analyst team.
10. Actively supports the MPS Strategic Plan.
11. Performs other duties as assigned.

**SUPERVISION RECEIVED:** (Indicate the extent to which work assignments and methods are outlined, reviewed, and approved by others.)

Receives supervision from the Chief Accountability and Efficiency Officer (CAEO). The CAEO assigns projects and approves final results.

**SUPERVISION EXERCISED:** (List the number and titles of personnel directly supervised. Specify the kind and extent of supervision exercised by indicating one or more of the following: (a) assign duties; (b) outline methods; (c) direct work in process; (d) review completed work; (e) sign or approve work; (f) make hiring recommendations; (g) prepare performance appraisal; (h) take or recommend disciplinary action.

Assigns and reviews work of department analysts.

**JOB REQUIREMENTS:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and ability required. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential functions.

**Education Requirements** (Include certificates, licenses, and/or registrations required.)

A bachelor's degree in finance, accounting, business administration, or related field from an accredited college or university is required, advanced education is preferred.

**Experience Requirements**

Five to seven years' of related business experience in a large company or public sector environment.

**Knowledge, Skills, and Abilities**

Advanced oral and written communication and presentation skills are required. Strong analytical and forecasting skills. Ability to effectively prioritize and execute tasks in a high-pressure environment. Ability to conform to shifting priorities, demands and timelines. Experience in forecasting multi-million budgets is required. Excellent teamwork skills are essential. The ability to develop effective working relationships with diverse individuals at all levels is required. Ability to evaluate and recommend changes to internal and management controls. Experience analyzing processes, recommending improvements, and presenting results to senior management. Experience in analyzing reports and identifying trends and variances. Experience in advanced forecasting, financial modeling, and KPI analysis is recommended. Advanced computer skills, particularly Microsoft Word, Excel, PowerPoint, and Project; Adobe Creative Suite; Web editing/HTML/CSS; and video editing software is required. Experience with Lean/Six Sigma is desired.

**WORKING ENVIRONMENT:** The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job.

General office environment.

*Reasonable accommodations requested by qualified individuals with disabilities will be made in accordance with the Americans with Disabilities Act (ADA) of 1990.*

**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 with or without reasonable accommodation.

General office environment, must be able to handle light lifting and occasional standing, bending.

**THIS DESCRIPTION DOCUMENTS THE GENERAL NATURE AND LEVEL OF RESPONSIBILITY ASSOCIATED WITH THIS POSITION. IT IS NOT INTENDED TO BE A COMPREHENSIVE LIST OF ALL ACTIVITIES, DUTIES AND RESPONSIBILITIES REQUIRED OF INCUMBENTS. IT IS NOT INTENDED TO LIMIT OR MODIFY THE RIGHT OF ANY SUPERVISOR TO ASSIGN, DIRECT, AND MONITOR THE WORK OF EMPLOYEES UNDER SUPERVISION.**