

## POSITION DESCRIPTION

This position description serves as the official classification document of record for this position. Please complete the information as accurately as you can as the position description is used to determine the proper classification of the position.	
<b>2. Employee's Name (Last, First, M.I.)</b>	<b>8. Department/Agency</b> TRANSPORTATION CENTRAL OFFICE
<b>3. Employee Identification Number</b>	<b>9. Bureau (Institution, Board, or Commission)</b> Finance & Administration
<b>4. Civil Service Position Code Description</b> Financial Analyst-E	<b>10. Division</b> Financial Operations
<b>5. Working Title (What the agency calls the position)</b> Financial Analyst	<b>11. Section</b> Budget, Outreach, and Program Support
<b>6. Name and Position Code Description of Direct Supervisor</b> CHANG, JINGJING; FINANCIAL MANAGER-3	<b>12. Unit</b> Budget, Reports, and Financial Outreach
<b>7. Name and Position Code Description of Second Level Supervisor</b> LINN, KARI A; STATE ADMINISTRATIVE MANAGER-1	<b>13. Work Location (City and Address)/Hours of Work</b> 425 W Ottawa Lansing / M-F 7:30-4:30pm AWS
<b>14. General Summary of Function/Purpose of Position</b>  This position serves as the financial outreach analyst to compile information and support the unit in the preparation and submission of Financial Outreach related Act 51 statistical, analytical, and statutory required reports to management on a weekly, monthly, quarterly, and annual basis. The duties of this position include the research, collection, and submission of Act 51 financial and analytical reports; preparation and distribution of monthly Michigan Transportation Fund (MTF) revenues to Michigan's counties, cities, and villages; and coordination of Act 51 training modules for counties, cities, and villages. This position provides outreach and system support to local forms of government and internal partners in an effort to compile data for various reports. Examples of summary reports include monthly Act 51 Financial Reports of MTF revenues and distributions for management and local units of government review. This position is responsible for the coordination of meetings, cross training, and knowledge transfer assignments for related Financial Outreach deliverables in addition to providing as needed support for other unit tasks and responsibilities.	

**15. Please describe the assigned duties, percent of time spent performing each duty, and what is done to complete each duty.**

List the duties from most important to least important. The total percentage of all duties performed must equal 100 percent.

**Duty 1**

**General Summary:**

**Percentage: 45**

Serves as the Financial Outreach analyst by researching, compiling, and preparing Financial Outreach program related financial, statistical, analytical, and statutory required reports to management on a weekly, monthly, quarterly, and annual basis. The duties of this position include the research, analysis, collection, and reporting of financial and analytical reports to track the performance outcomes and deliverables outlined in PA 51 of 1951, MCL's 247.662 and 247.663 related to financial services provided to counties, cities, and villages by the Financial Outreach program. Gather and compile reports from the Accounting Service Center, Department of Treasury and Department of Technology, Management and Budget-State Budget Office (DTMB-SBO) for reporting purposes. Serve as a contact for 614 local units of governments to troubleshoot and interpret policies on the submission within the Act 51 Distribution and Reporting System (ADARS) for reporting.

**Individual tasks related to the duty:**

- Researches, complies, and prepares data/reports (e.g. financial, statistical, demographic, and analytic data) related to PA 51 of 1951 monthly distributions to counties, cities, villages in response to requests received by the House and Senate Fiscal Agencies, the Legislature, MDOT leadership, and other related local unit of government stakeholders for use in future budget development or for the legislature's use in proposing new Act 51 related legislation. Examples of reports include monthly MTF revenue allocation analysis, monthly MTF distribution analysis, monthly withholding analysis, and other as needed reports as requested.
- Compile and analyze report data for reporting purposes, coordinating with internal and external partners to compile data from various resources and reports. This includes reviewing the monthly MTF revenue data for accuracy and completeness and researching the unusual trends to explain to MDOT leadership and other stakeholders which supports the unit in the monitoring of PA 51 of 1951 statutory compliance requirements for counties, cities, and villages on an as-needed basis to help ensure all statutory requirements are being adhered to.
- Serve as Financial Outreach Liaison to 614 local government agencies by interpreting policy and providing policy support for the compilation of information and data from other state agencies to assist with related financial outreach services deliverables. Field standard technical reporting inquiries and provide standard noncomplex policy guidance (i.e., inquiries where guidance is readily available through law or established policy/procedure) regarding accounting treatments in Street/Financial reports and provide policy guidance on the proper use of MTFs in ADARS.
- Assists the unit with the planning, implementing, and evaluating of programs and services provided for under PA 51 of 1951, MCL 247.662 and 247.663. This includes researching and compiling program data then statistically analyzing trends for accuracy which includes comparing current year reporting information to prior year(s) for reasonableness compared to the overall financial picture of the local unit by comparison to that agency's financial audit which is used to build financial reports for other internal and external partners.

**Duty 2**

**General Summary:**

**Percentage: 45**

Responsible for the preparation of the monthly submission of the monthly MTF revenues to Michigan's counties, cities, and villages prior to the release of the MTF distribution of revenues. Serve as the coordinator overseeing Act 51 Financial Outreach training modules to assist counties, cities, and villages in the administration of MCL 247.662 (Counties) and MCL 247.663 (Cities and Villages).

**Individual tasks related to the duty:**

- Responsible for the preparation of the monthly submission of the monthly MTF revenues to Michigan's counties, cities, and villages by independently compiling reporting data from multiple state agencies and reviewing for reasonableness and accuracy prior to the release of the MTF distribution of revenues.
- Responsible for gathering and compiling data from various sources to build reports needed to make financial decisions and determine eligibility to receive MTF's.
- Serves as the primary liaison/contact as it relates to Act 51 training modules for local agencies in coordination with the Financial Specialists within the unit. Conducts training and outreach as a liaison between external partners (counties, cities, villages).
- Provide support to the Unit Supervisor in responding to as-needed requests for information and data relating to Financial Outreach Services program outcomes and deliverables.

**Duty 3**

**General Summary:**

**Percentage: 10**

Provide back up to other functions within the unit and perform other miscellaneous functions as necessary and/or requested by management.

**Individual tasks related to the duty:**

- Assist the unit with support during cyclical time pressures and other related commitments to ensure compliance to deadlines set forth in Act 51.
- Duties as assigned by unit supervisor or section manager.

**16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.**

Make decisions based on experience and knowledge of MDOT operations and policies. Whenever possible, identify and record improvements in work methods and materials used for the position.

**17. Describe the types of decisions that require the supervisor's review.**

Supervisor assistance is sought when guidance and guidelines are unclear, ambiguous, or cover a new or unique situation.

**18. What kind of physical effort is used to perform this job? What environmental conditions in this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.**

The duties of this position are performed in an office environment. Physical demands are normal to a desk job in an office environment such as extensive use of a computer.

**19. List the names and position code descriptions of each classified employee whom this position immediately supervises or oversees on a full-time, on-going basis.**

Additional Subordinates

**20. This position's responsibilities for the above-listed employees includes the following (check as many as apply):**

- |                            |                                    |                            |                                   |
|----------------------------|------------------------------------|----------------------------|-----------------------------------|
| <input type="checkbox"/> N | Complete and sign service ratings. | <input type="checkbox"/> N | Assign work.                      |
| <input type="checkbox"/> N | Provide formal written counseling. | <input type="checkbox"/> N | Approve work.                     |
| <input type="checkbox"/> N | Approve leave requests.            | <input type="checkbox"/> N | Review work.                      |
| <input type="checkbox"/> N | Approve time and attendance.       | <input type="checkbox"/> N | Provide guidance on work methods. |
| <input type="checkbox"/> N | Orally reprimand.                  | <input type="checkbox"/> N | Train employees in the work.      |

**22. Do you agree with the responses for items 1 through 20? If not, which items do you disagree with and why?**

Yes.

**23. What are the essential functions of this position?**

This position serves as the financial outreach analyst to compile information and support the unit in the preparation and submission of Financial Outreach related Act 51 statistical, analytical, and statutory required reports to management on a weekly, monthly, quarterly, and annual basis. The duties of this position include the research, collection, and submission of Act 51 financial and analytical reports; preparation and distribution of monthly Michigan Transportation Fund (MTF) revenues to Michigan's counties, cities, and villages; and coordination of Act 51 training modules for counties, cities, and villages. This position provides outreach and system support to local forms of government and internal partners in an effort to compile data for various reports. Examples of summary reports include monthly Act 51 Financial Reports of MTF revenues and distributions for management and local units of government review. This position is responsible for the coordination of meetings, cross training, and knowledge transfer assignments for related Financial Outreach deliverables in addition to providing as needed support for other unit tasks and responsibilities.

**24. Indicate specifically how the position's duties and responsibilities have changed since the position was last reviewed.**

New establishment.

**25. What is the function of the work area and how does this position fit into that function?**

Financial Operations Division provides management with various reporting and financial services related to the Budget, Financial Outreach and Program Support Services deliverables. This position assists in the compilation, reporting of Act 51 Financial Outreach data and the related distribution of funds to local units of government for road infrastructure investments. This information is used by the department, local units of government, and related stakeholders to assist with state and local infrastructure strategic planning.

**26. What are the minimum education and experience qualifications needed to perform the essential functions of this position.**

**EDUCATION:**

Possession of a bachelor's degree in any major with at least 12 semester (18 term) credits in one or a combination of the following: accounting, finance, or economics.

**EXPERIENCE:**

**Financial Analyst 9**

No specific type or amount is required.

**Financial Analyst 10**

One year of professional experience providing a systematic review, analysis, interpretation, and/or evaluation of budgets, mortgages, loans, or other financial data, equivalent to a Financial Analyst 9, Accountant 9, or Auditor 9.

**Financial Analyst P11**

Two years of professional experience providing a systematic review, analysis, interpretation, and/or evaluation of budgets, mortgages, loans, or other financial data, equivalent to a Financial Analyst, including one year equivalent to a Financial Analyst 10, Accountant 10, or Auditor 10.

**KNOWLEDGE, SKILLS, AND ABILITIES:**

Knowledge of:

- State of Michigan accounting policies and procedures is desirable.

Ability to:

- Collect, organize, and analyze data using spreadsheets, database software, and/or computer systems.
- Communicate data clearly and in an understandable manner.
- Work independently.
- Maintain favorable public relations with internal and external customers.
- Cooperate in working with others.

**CERTIFICATES, LICENSES, REGISTRATIONS:**

N/A

*NOTE: Civil Service approval does not constitute agreement with or acceptance of the desired qualifications of this position.*

***I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.***

\_\_\_\_\_  
Supervisor

\_\_\_\_\_  
Date

**TO BE FILLED OUT BY APPOINTING AUTHORITY**

Indicate any exceptions or additions to the statements of employee or supervisors.

N/A.

***I certify that the entries on these pages are accurate and complete.***

LOGAN BRISTOL

4/15/2024

\_\_\_\_\_  
Appointing Authority

\_\_\_\_\_  
Date

***I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.***

\_\_\_\_\_  
Employee

\_\_\_\_\_  
Date