

**State of Michigan  
Civil Service Commission**

Capitol Commons Center, P.O. Box 30002  
Lansing, MI 48909

<b>Position Code</b>
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1. FINCALTE
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## 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> DEPT OF INS AND FIN SERVICE
<b>3. Employee Identification Number</b>	<b>9. Bureau (Institution, Board, or Commission)</b> Office of Financial and Administrative Services
<b>4. Civil Service Position Code Description</b> Financial Analyst-E	<b>10. Division</b> Budget, Grant and Financial Reporting
<b>5. Working Title (What the agency calls the position)</b> Grant Analyst	<b>11. Section</b>
<b>6. Name and Position Code Description of Direct Supervisor</b> SAGE, KAREN S; STATE ADMINISTRATIVE MANAGER-1	<b>12. Unit</b>
<b>7. Name and Position Code Description of Second Level Supervisor</b> RAMOS, MEGAN A; SENIOR POLICY EXECUTIVE	<b>13. Work Location (City and Address)/Hours of Work</b> 530 W. Allegan, St., 7th Floor, Lansing, Michigan 48933 / 8:00 am to 5:00 pm, Monday-Friday
<b>14. General Summary of Function/Purpose of Position</b> This position is responsible for the development and maintenance of the cost allocation plan and indirect rate. This position is also responsible for federal grant applications, activity monitoring and requesting financial draws, and developing reports related to restricted and federal grant fund sources.	

**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: 50**

Responsible for the development of the cost allocation plan, federal indirect rate, and other related financial reports

**Individual tasks related to the duty:**

- In direct coordination with vendors, develop a cost allocation plan for the programs within the department to ensure that each funding source is providing the appropriate level of support for the administration offices supporting DIFS. The cost allocation project is based on actual expenditures for the most recent fiscal year.
- Coordinate with each office director to verify the work performed falls within an administrative office.
- Develop and analyze financial reports that determine what personnel effort and related expenditures need to be adjusted for business offices, and what impact changes have to the department's cost allocations.
- Develop and maintain financial cost allocation reports to determine multi-year statistical trends.
- In coordination with vendor(s) and Federal government, develop and negotiate an indirect rate agreement for federal grants received as required by the Federal government. Must perform analysis of department costs and administrative support resources.
- Develop financial reports as part of federal indirect rate study, ensure to capture historical trends and current costs.
- Maintain records and statistical data.
- Reconcile appropriation and funds in SIGMA to ensure accuracy of the cost allocation percentage.

**Duty 2**

**General Summary:**

**Percentage: 35**

Responsible for monitoring federal grant applications and activity including monitoring and requesting financial draws on behalf of the department.

**Individual tasks related to the duty:**

- Analyze historical data and current costs to development federal grant budgets.
- Review and submit federal grant applications.
- Generate and develop reports used to monitor federal grant activity.
- Generate and analyze reports to determine the amounts for federal grant financial draws.
- Develop federal grant reports for Office Directors.
- Reconcile federal grant financial draws in SIGMA.

**Duty 3**

**General Summary:**

**Percentage: 15**

Other duties as assigned.

**Individual tasks related to the duty:**

- Compile and review budget and financial information for the annual Insurance Department Resource Report (IDRR), the Conference of State Bank Supervisors Annual Profile, the department's Annual Report, and other requested surveys and reports. Includes analyzing and validating budget and expenditure information.
- Analyze and reconcile the Insurance Carrier Deposit Fund quarterly reports with SIGMA and Treasury deposit reports evaluating for fluctuations in balance sheet, equity, assess, and liabilities with current and prior year. Participate in year-end activities related to the fund's publication in the state Annual Comprehensive Financial Report.
- Other duties as assigned.

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

Make decisions related to day-to-day work priorities.

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

Decisions that exceed the authority delegated to this position.

**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.**

Position duties and tasks are performed in a traditional office environment which includes considerable sitting, occasional standing, limited lifting; extensive computer usage and normal office duties.

**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):**

- |   |                                    |   |                                   |
|---|------------------------------------|---|-----------------------------------|
| N | Complete and sign service ratings. | N | Assign work.                      |
| N | Provide formal written counseling. | N | Approve work.                     |
| N | Approve leave requests.            | N | Review work.                      |
| N | Approve time and attendance.       | N | Provide guidance on work methods. |
| N | Orally reprimand.                  | 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?**

See box #14.

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

Downgrading PD for recruitment purposes.

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

OFAS is responsible for all areas of budget development, procurement, revenue and expenditure, internal controls, travel and vehicle services, facilities, and technology. This position is responsible for the cost allocation plan, department federal indirect rate, federal grant monitoring and reporting.

**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:**

Personal and professional integrity.

Excellent organization skills.

Excellent communication skills and the ability to communicate effectively with all levels of public and private sector audiences.

High degree of initiative and willingness to assume greater levels of responsibility.

Knowledge of financial management principles and practices.

Knowledge of the principles and practices of financial analysis.

Ability to quickly assimilate a variety of oral and written data, (i.e., legal, social, economic, etc.) to analyze facts and draw logical conclusions.

Works well under pressure.

Ability to work successfully on multiple, high-visibility projects and provide requested information quickly and accurately.

**CERTIFICATES, LICENSES, REGISTRATIONS:**

None

*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.***

ERMELINDA GARZA

7/18/2024

\_\_\_\_\_  
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