

STATE OF OHIO (DAS) CLASSIFICATION SPECIFICATION	<b><u>CLASSIFICATION SERIES</u></b> Financial Manager	<b><u>SERIES NUMBER</u></b> 6658
	<b><u>MAJOR AGENCIES</u></b> All Agencies	<b><u>EFFECTIVE</u></b> 07/26/2015

**SERIES PURPOSE**

The purpose of the financial manager occupation is to manage & direct agency financial planning, budgeting &/or sourcing activities.

**GLOSSARY** – the terms below are to be interpreted as follows wherever they appear in the classification specification:

**APO** – Agency Procurement Officer

**CBO** – Chief Budget Officer

**CFO** – Chief Financial Officer

**COA** – Chief of Accounting

**DAS** – Ohio Department of Administrative Services

**MBE/EDGE** – Minority Business Enterprise/Encouraging Diversity, Growth & Equity

**OBM** – Ohio Office of Budget & Management

<b><u>JOB TITLE</u></b>	<b><u>JOB CODE</u></b>	<b><u>PAY GRADE</u></b>	<b><u>EFFECTIVE</u></b>
Financial Program Manager	66585	14	07/26/2015

**CLASS CONCEPT**

The administrative level class works under direction and requires considerable knowledge of business administration & accounting in order to manage & coordinate a budget, financial &/or sourcing program & have significant autonomy to formulate, develop, enforce &/or implement program policy.

<b><u>JOB TITLE</u></b>	<b><u>JOB CODE</u></b>	<b><u>PAY GRADE</u></b>	<b><u>EFFECTIVE</u></b>
Financial Manager	66586	15	07/26/2015

**CLASS CONCEPT**

The first managerial level class works under general direction and requires extensive knowledge of business administration & accounting in order to coordinate & manage multiple work units &/or programs & supervise program manager(s) &/or unit supervisor(s) OR serve as agency APO, CBO or COA & supervise assigned staff.

<b><u>JOB TITLE</u></b>	<b><u>JOB CODE</u></b>	<b><u>PAY GRADE</u></b>	<b><u>EFFECTIVE</u></b>
Senior Financial Manager	66587	16	07/26/2015

**CLASS CONCEPT**

The second managerial level class works under administrative direction & requires extensive knowledge of business administration & accounting in order to plan, direct & manage multiple components of assigned line(s) of business & supervise assigned staff which must include at least one position classified as Financial Manager or equivalent OR act as assistant CFO & supervise assigned staff.

<b>JOB TITLE</b>	<b>JOB CODE</b>	<b>B. U.</b>	<b>EFFECTIVE</b>	<b>PAY GRADE</b>
Financial Program Manager	66585	EX	07/26/2015	14

**JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)**

1. Manages & coordinates budget, financial &/or sourcing program (e.g., MBE/EDGE, Asset Management, Grant Financial Management, Contract Management) & has significant autonomy to formulate, develop, enforce &/or implement program policy:
  - Formulates & implements program policies & procedures
  - Develops program plans & performance measures
  - Provides technical advice for use in decision making
  - Directs delivery of programmatic goals
  - Responds to programmatic issues
  - Plans, writes & implements programmatic goals & evaluates programmatic performance
  - Writes position papers & prepares reports
  - Reviews & evaluates proposed legislation, rule &/or policy changes to determine programmatic impact
2. Serves as program liaison:
  - Develops & coordinates communications activities
  - Researches & responds to inquiries & issues
  - Furnishes information & explains programs to public, legislators & news media
  - Represents agency at meetings & conferences with state, federal & community agencies
3. Develops proposals & administers projects:
  - Interviews stakeholders to determine needs & expectations
  - Defines project requirements, quality standards & timelines
  - Defines specific activities to be performed to produce project deliverables
  - Ensures scheduled timeframes are met
  - Maintains regular contact with stakeholders & updates on project status
4. Manages fiscal functions/services of program:
  - Prepares & administers budget
  - Authorizes expenditures & purchases
  - Establishes & oversees maintenance of fiscal controls

**MAJOR WORKER CHARACTERISTICS**

Knowledge of public or business administration, accounting &/or finance; applicable state &/or federal laws, rules, procedures & standards governing fiscal operations\*; ERP systems\* (e.g., OAKS FIN) &/or federal accounting system\*. Skill in use of calculator, electronic devices (e.g., computer, tablet, cell phone) & applicable software applications (e.g., spreadsheets, databases, word processing), OAKS BI reporting\*. Ability to deal with large number of fiscal &/or budgetary variables & determine specific course of action; define problems, collect & analyze data, establish facts & draw valid conclusions; prepare &/or edit financial reports, records, &/or correspondence; gather, collate & classify information about data, people or things; concentrate with attention to detail; deal with many variables & determine specific action; respond to confidential & sensitive inquiries from employees, public & government officials.

(\*)Developed after employment.

**COMPETENCIES**

Making Decisions and Solving Problems  
Developing Objectives and Strategies  
Providing Consultation and Advice to Others

**MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT**

Completion of graduate core program in public or business administration, accounting, finance or related field; 18 mos. exp. or 18 mos. trg. in financial administration.

-Or completion of undergraduate core program in public or business administration, accounting, finance or related field; 30 mos. exp. or 30 mos. trg. in financial administration.

-Or 54 mos. exp. or 54 mos. trg. financial administration.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

NOTE: Successful completion of the Fiscal Academy may be substituted for 4 mos. of required accounting/fiscal experience referenced in this portion of the minimum qualifications.

**TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT**

Not applicable.

**UNUSUAL WORKING CONDITIONS**

May be required to work long or unusual hours during peak operational periods.

<b>JOB TITLE</b>	<b>JOB CODE</b>	<b>B. U.</b>	<b>EFFECTIVE</b>	<b>PAY GRADE</b>
Financial Manager	66586	EX	07/26/2015	15

**JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)**

- 1a. Coordinates & manages multiple work units &/or programs & supervises program manager(s) &/or unit supervisor(s):
  - Provides guidance & training to staff
  - Establishes, implements & monitors goals, objectives & performance metrics
  - Approves statistical reports & financial statements for distribution
  - Coaches & develops staff
  - Approves formal actions &/or requests for work units &/or programs
  
2. Formulates & implements policies & procedures
  - Reviews & evaluates proposed legislation, rule &/or policy changes to determine impact
  - Develops & recommends legislation, rule &/or policy updates
  - Establishes work unit &/or program procedures
  
3. Represents agency with internal & external stakeholders
  - Represents agency at state financial associations
  - Coordinates federal, state &/or internal audit activities
  - Serves as liaison with federal programs, DAS, OBM, & other agencies

OR

- 1b. Serves as agency APO, CBO or COA & supervises assigned staff:
  - Establishes agency direction for sourcing, budget or accounting
  - Develops agency/departmental sourcing, financial or accounting standards & practices
  - Provides guidance & training to staff
  - Approves formal agency actions &/or requests:
    - Controlling Board
    - Budget
    - Rates
    - Non-performing suppliers
    - Compliance & corrective action
    - Financial statements & reports
  - Establishes, implements & monitors goals, objectives & performance metrics
  - Approves statistical reports & financial statements for distribution
  - Coaches & develops staff

**MAJOR WORKER CHARACTERISTICS**

Knowledge of supervisory principles/techniques\*; employee training & development\*; public or business administration, accounting &/or finance; applicable state &/or federal laws, rules, procedures & standards governing fiscal operations\*; ERP systems\* (e.g., OAKS FIN) &/or federal accounting system\*. Skill in use of calculator, electronic devices (e.g., computer, tablet, cell phone) & applicable software applications (e.g., spreadsheets, databases, word processing), OAKS BI reporting\*. Ability to deal with large number of fiscal &/or budgetary variables & determine specific course of action; define problems, collect & analyze data, establish facts & draw valid conclusions; prepare &/or edit financial reports, records, &/or correspondence; gather, collate & classify information about data, people or things; concentrate with attention to detail; deal with many variables & determine specific action; respond to confidential & sensitive inquiries from employees, public & government officials; establish friendly atmosphere as division or large section chief.

(\*)Developed after employment.

**COMPETENCIES**

Making Decisions and Solving Problems  
 Developing Objectives and Strategies  
 Providing Consultation and Advice to Others

**MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT**

Completion of graduate core program in public or business administration, accounting, finance or related field; 30 mos. exp. or 30 mos. trg. in financial administration.

-Or completion of undergraduate core program in public or business administration, accounting, finance or related field; 42 mos. exp. or 42 mos. trg. in financial administration.

-Or 66 mos. exp. or 66 mos. trg. financial administration.

-Or 12 mos. exp. as Financial Program Manager, 66585.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

NOTE: Successful completion of the Fiscal Academy may be substituted for 4 mos. of required accounting/fiscal experience referenced in this portion of the minimum qualifications.

**TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT**

Not applicable.

**UNUSUAL WORKING CONDITIONS**

May be required to work long or unusual hours during peak operational periods.

<b>JOB TITLE</b>	<b>JOB CODE</b>	<b>B. U.</b>	<b>EFFECTIVE</b>	<b>PAY GRADE</b>
Senior Financial Manager	66587	EX	07/26/2015	16

**JOB DUTIES IN ORDER OF IMPORTANCE (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)**

1. Plans, directs & manages multiple components of assigned line(s) of business & supervises assigned staff which must include at least one position classified as Financial Manager or equivalent OR acts as assistant CFO & supervises assigned staff:
  - Assumes full responsibility & authority in CFO's absence
  - Reviews proposals of agency managers & program leaders & makes recommendations
  - Establishes strategic planning & direction for agency financial operations
  - Authorizes agency/departmental sourcing, financial or accounting standards & practices
  - Establishes, implements & monitors goals, objectives & performance metrics
  - Manages structure of financial operation (e.g., separation of duties; workforce & succession planning; business continuity)
  - Coaches & develops staff
  
2. Manages fiduciary aspects of financial operations:
  - Directs fiscal policy
  - Negotiates agency's position with various entities (e.g., federal government; political subdivisions of the state; state agencies; other states; other public or private entities)
  - Directs the remediation of actions concerning the agency (e.g., corrective action plans; legal claims; Inspector General findings)
  - Manages risk profile of agency's financial operations
  
3. Directs preparation of correspondence, reports, policy statements, legislative drafts.

**MAJOR WORKER CHARACTERISTICS**

Knowledge of supervisory principles/techniques; employee training & development; public or business administration, accounting &/or finance; applicable state &/or federal laws, rules, procedures & standards governing fiscal operations\*; ERP systems\* (e.g., OAKS FIN) &/or federal accounting system\*. Skill in use of calculator, electronic devices (e.g., computer, tablet, cell phone) & applicable software applications (e.g., spreadsheets, databases, word processing), OAKS BI reporting\*. Ability to deal with large number of fiscal &/or budgetary variables & determine specific course of action; define problems, collect & analyze data, establish facts & draw valid conclusions; prepare &/or edit financial reports, records, &/or correspondence; gather, collate & classify information about data, people or things; concentrate with attention to detail; deal with many variables & determine specific action; respond to confidential & sensitive inquiries from employees, public & government officials; establish friendly atmosphere as division or large section chief.

(\*)Developed after employment.

**COMPETENCIES**

Making Decisions and Solving Problems  
Developing Objectives and Strategies  
Providing Consultation and Advice to Others

**MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT**

Completion of graduate core program in public or business administration, accounting, finance or related field; 30 mos. exp. or 30 mos. trg. in financial administration; 12 mos. exp. or 12 mos. trg. in supervisory principles & techniques.

-Or completion of undergraduate core program in public or business administration, accounting, finance or related field; 42 mos. exp. or 42 mos. trg. in financial administration; 12 mos. exp. or 12 mos. trg. in supervisory principles & techniques.

-Or 66 mos. exp. or 66 mos. trg. financial administration; 12 mos. exp. or 12 mos. trg. in supervisory principles & techniques.

-Or 12 mos. exp. as Financial Manager, 66586.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

NOTE: Successful completion of the Fiscal Academy may be substituted for 4 mos. of required accounting/fiscal experience referenced in this portion of the minimum qualifications.

**TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT**

Not applicable.

**UNUSUAL WORKING CONDITIONS**

May be required to work long or unusual hours during peak operational periods.