STATE OF OHIO (DAS) CLASSIFICATION SPECIFICATION	CLASSIFICATION SERIES Financial Manager	SERIES NUMBER 6658
	MAJOR AGENCIES All Agencies	EFFECTIVE 02/05/2017

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

JOB TITLE	JOB CODE	PAY GRADE	EFFECTIVE
Financial Program Manager	66585	14	02/05/2017

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.

JOB TITLE	JOB CODE	PAY GRADE	EFFECTIVE
Financial Manager	66586	15	02/05/2017

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.

JOB TITLE	JOB CODE	PAY GRADE	EFFECTIVE
Senior Financial Manager	66587	16	02/05/2017

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.

JOB TITLE	JOB CODE	B. U.	EFFECTIVE	PAY GRADE
Financial Program Manager	66585	EX	02/05/2017	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.

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.

JOB TITLE	JOB CODE	B. U.	EFFECTIVE	PAY GRADE
Financial Manager	66586	EX	02/05/2017	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.

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.

JOB TITLE	JOB CODE	B. U.	EFFECTIVE	PAY GRADE
Senior Financial Manager	66587	EX	02/05/2017	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.

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.