

## FINANCIAL SERVICES MANAGER

**DISTINGUISHING FEATURES OF THE CLASS:** This position is responsible for the efficient management and administration of the Financial Services Department. The work involves the responsibility of overseeing the delivery of financial services to component school district administrators and support personnel. An incumbent is responsible for the marketing of the systems, software, and services which provide general ledger, accounts payable and payroll capabilities to the component school districts. The work is performed under the general supervision of the Director of the Mid-Hudson Regional Information Center (MHRIC). General supervision is exercised over staff in the delivery of services to school districts. Does related work as required.

**TYPICAL WORK ACTIVITIES:** The typical work activities listed below, while providing representative examples of the variety of work assignments in the title, do not describe any individual position, incumbents in this title may perform some or all of the following, as well as other related activities not described.

Assists Director in the planning, promotion, and presentation of financial administrative services;

Designs, prepares and delivers marketing presentations to district administrators for new product offerings, enhancements, etc;

Develops software and support service proposals for computerized financial services applications in the school districts;

Ensures the delivery of computerized financial administrative services;

Oversees and assesses the development and delivery of training classes for client districts;

Supervises the staff of the Financial Services Department in providing clear communication and organized, focused program support to the school districts;

Consults with district administrators to discuss their service and training needs;

Develop new value-added offerings in existing software to take advantage of web-enabled systems in districts;

Communicates with New York State and Federal agencies regarding accurate school district information reporting;

Prepares and presents hardware recommendations and proposals to school business officers, with guidance from RIC technical staff;

Assists in budget development, monitors expenditures and approves purchase orders within approved guidelines;

Meets with RIC administrators and managers to plan on-going customer support and development of new services;

Reviews and evaluates the work of staff and prepares periodic performance reports.

**KNOWLEDGES, SKILLS, ABILITIES AND PERSONAL CHARACTERISTICS:** Thorough knowledge of the capabilities, function and potential of computer technologies and their application to financial administration in an instructional environment; good knowledge of educational philosophies and trends; good knowledge of computerized financial record keeping and current windows-based and web-based office applications; good knowledge of the principles of management and administration; good marketing skills; good organizational skills; ability to direct, plan, schedule and evaluate the work of others; ability to conduct presentations and supervise the development of training programs; ability to establish and maintain cooperative relations with clients and personnel; ability to understand and carry out complex oral and written instructions; ability to communicate effectively both orally and in writing; poise, initiative, tact and resourcefulness; physical condition commensurate with the duties of the position.

**MINIMUM QUALIFICATIONS:** Either:

- A. Graduation from a New York State registered or regionally accredited college or university with a Master's Degree, which included or was supplemented by fifteen (15) credit hours\* in Accounting, Business, Computer Science, Information Resources Management, Information Technology, Management Information Systems or closely related field and two (2) years (full-time paid, or its' part-time equivalent) experience in using a computerized financial system in applying technology training and/or support by phone or on-site to users. The two years of experience must have included or been supplemented by experience in project management; **OR**
- B. Graduation from a New York State registered or regionally accredited college or university with a Bachelor's Degree, which included or was supplemented by fifteen (15) credit hours\* in Accounting, Business, Computer Science, Information Resources Management, Information Technology, Management Information Systems or closely related field and four (4) years (full-time paid, or its' part-time equivalent) experience in using a computerized financial system, which included or was supplemented by two (2) years of experience in applying technology training and/or support by phone or on-site to users and experience in project management; **OR**
- C. Graduation from a New York State registered or regionally accredited college or university with an Associate's Degree, which included or was supplemented by fifteen (15) credit hours\* in Accounting, Business, Computer science, Information Resources Management, Information Technology, Management Information Systems or closely related field and six (6) years (full-time paid, or its' part-time equivalent) experience in using a computerized financial system, which included or was supplemented by two (2) years of experience in applying technology training and/or support by phone or on-site to users and experience in project management; **OR**
- D. An equivalent combination of training and experience as indicated above.

\*Coursework in the use of specific programs such as WORD, EXCEL or ACCESS and data entry is not acceptable.

**Special Requirement:** Possession of a valid New York State driver's license appropriate to the vehicles operated or otherwise demonstrate their ability to meet the transportation needs of the job.

ULSTER COUNTY  
3151 FIN MGR  
Classification: Competitive  
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Adopted: December 22, 2003