

# Classification Description



**Title:** Finance Manager  
**Department:** Finance and Regulatory Services  
**Job Code:** 1280  
**Pay Grade:** R  
**FLSA Status:** Exempt

**Bargaining Unit:** Non-represented  
**Established:** 12/23  
**Revised:**  
**EEO Category:** Officials and Administrators

## CLASSIFICATION DESCRIPTION

Oversees the full financial needs of assigned department/s on a broad range of financial matters and will serve as a working strategic partner and advisor to leadership. Prepares, manages, and supports the strategic planning and financial development of departmental budgets, including providing frequent support and maintenance of the agency and legal budget processes, procedures, and reporting. Prepares financial reports and forecasts, financial analysis over labor costs, projects, revenue components, and fund balances (net cash position). Provides ad-hoc support for many financial items as they arise. Supports capital planning, capital project reporting and financial analysis on resource needs, including agency capital bonds with capital projects and reports to various fund and program oversight committees. Supports major operations and programs, ensures federal grant compliance, and manages internal financial records.

Supervises a team of various position classifications with a variety of skill sets that are responsible for budget, finance, and regulatory services for the departments they support. Position and team will oversee procurement and contract compliance for departments and the associated payables/purchase cards (Pcards)/reimbursements/check requests. Responsible for internal controls, cash operations, contract management on financial components, and projects focused on improved business performance and efficiencies.

## DISTINGUISHING FEATURES

This is a single unit classification distinguished by the increased levels of responsibility, supervision of assigned staff, reporting structure, planning and financial responsibility.

## DUTIES AND RESPONSIBILITIES

1. Prepares annual department/s budget and five-year forecasts as assigned. This includes management of budget calendar and deadlines, creation and updating of departmental budget tools, preparation of operating and bond 5-year fund forecasts and presentation materials, communication of Chief Financial Officer (CFO) budget instructions and assumptions, working with department/s staff and leadership to prepare budget and budget deliverables, updating narrative materials, and preparing technical, substantive, and administrative budget amendments at various stages during the year.
2. Supports the department/s annual capital improvement plan for Agency budget adoption and facilitates capital planning and management for the department. Prepares capital reports monthly, quarterly and ad-hoc as needed and works with the department to manage capitalization and inventory records.

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3. Prepares financial reporting for assigned department/s and presentation materials. This includes quarterly financial reports for the COO/CFO, monthly financial reports for department/s leadership, financial reports for various committees/teams/boards/commissions and ad-hoc reports as assigned and needed. Presents these materials to various committees/teams/boards/commissions and the Agency Council.
4. Provides supervision to professional and technical staff, including hiring, promoting, transferring, evaluating performance, disciplining, discharging, coaching/mentoring, and technical training. Manages daily workflow for finance staff by assigning work and projects, helps with prioritization and department issues.
5. Provides counsel/instruction/advice on budget and accounting issues, invoice/Pcard/check requests, internal controls, financial policies and best practices, economic decisions, contract administration, and various other related issues to assigned department/s, staff, and team members.
6. Supports accounting and payroll teams with general ledger (GL) issues, year-end (YE) processes and annual report, journal entry, reconciliations to B/S accounts, inventory tracking, point-of-sale (POS) system issues and other various items that allow for effective and efficient processes for the department/s.
7. Develops, manages, updates, and conducts research to create financial policies for department/s under the influence and compliance of Metro policy, procedures, Metro Code and Charter, and Government Finance Officers Association (GFOA)/business best practices.
8. Conducts technical, procedural and compliance reviews over journal entries/vouchers, budget coding for department/s recruitment, position reclasses, non-standard contracts (including grants), financial elements of program work and other ad-hoc department/s requests.
9. Assists and oversees the preparation of underlying work papers and documents for the Comprehensive Annual Financial Report, Single Audit, monthly and quarterly financial reports for assigned areas.
10. Oversees and ensures, with department/s as a grantee, grant compliance with federal, state and granting agency regulations and Metro internal controls. With department/s as a grantor, oversees support department in grant tracking, invoicing and receipting requirements, internal financial controls, and reporting procedures in accordance with grant and Metro requirements.
11. Supports department/s in their operations. This includes, but is not limited to, revenue projections and analysis for cost recovery, major contract element's compliance, allocation of appropriate costs, help with analysis over unit cost estimates, projections of cash burn rates, system support and reporting metrics.
12. Participates as a member of the agency Finance team; implements and supports Finance's objectives and initiatives; including performance metrics, equity in budgeting and Council priorities.

It is the responsibility of all Metro employees to:

1. Actively participates on committees and/or attends meetings as assigned.

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2. Fulfills Metro's core values of public service, excellence, teamwork, respect, innovation and sustainability.
  - Builds and maintains positive relationships and contributes to a positive team atmosphere; engages others in ways that foster respect and trust.
  - Encourages and appreciates diversity in people and ideas – seeks to understand the perspectives of others.
  - Provides excellent customer service – assists the public, public officials and agency partners, and other employees in a professional and courteous manner with the goal of meeting or exceeding expectations.
  - Practices continuous improvement – researches new possibilities, contributes ideas and stays current in field of work.
  - Demonstrates sustainable practices in applicable field and generally for resource use and protection.
  - Works assigned schedule (if applicable) and exhibits regular and predictable attendance.
  - Works in a safe manner and follows safety policies, practices and procedures.
  - Complies with Metro and Metro's visitor venues policies, procedures and applicable work rules; applicable law and collective bargaining agreements as appropriate.
3. Performs assigned duties during an emergency situation.
4. Performs other duties as assigned.

### **JOB SPECIFICATIONS**

#### **Education/Licensing and Work Experience:**

- Bachelor's degree in Finance, Accounting, Public Administration, or a related field, and
- Five years of experience in governmental budgeting and accounting, or
- Any combination of experience, education and training which provides the equivalent scope of knowledge, skills and abilities necessary to perform the essential job duties.

#### **Preferred:**

- Certified Public Accountant (CPA)

#### **Knowledge, Skills and Abilities:**

- Knowledge of budget development and oversight.
- Knowledge of enterprise operations either public or private or both.
- Knowledge of the principles and practices of governmental budgeting and budget control.
- Knowledge of the principles, practices and techniques of organizational, financial and administrative analysis.
- Knowledge of the principles of supervision, motivation, training and performance evaluation.
- Knowledge of federal grants administration, cost accounting, audit and contract issues.

- Knowledge of the principles and delivery of superior customer service.
- Skill in financial system software.
- Skill in financial reporting.
- Skill in continuously seeking ways to improve efficiencies and service to the public.
- Ability to research, analyze and evaluate new service delivery methods, procedures and techniques.
- Ability to deal effectively with employee conflict and resolutions.
- Ability to foster workplace diversity values and outreach in program execution and delivery.
- Ability to provide planning, leadership, and technical oversight in developing goals and objectives for assigned area.
- Ability to select, train, supervise, coach and evaluate staff.
- Ability to lead teams and assist in continued training for the growth of individuals.
- Ability to establish, inspire and maintain cooperative working relationships with management and staff.
- Ability to strategically weigh risks and benefits of actions, prior to taking action.
- Ability to embrace change and innovation when appropriate.
- Ability to maintain confidentiality.
- Ability to perform essential duties and responsibilities.
- Ability to perform (with or without a reasonable accommodation) the physical demands in the work environment and operate the tools and equipment.
- Ability to successfully pass the background check and screening requirements if required for the position.
- Ability to possess a current driver's license and driving record sufficient to be insured by Metro insurance carrier if required for the position.

### **SUPERVISION RECEIVED**

- Supervision is received from assigned Supervisor or Manager.

### **SUPERVISION EXERCISED**

- Full supervisory authority to hire, transfer, suspend, lay off, recall, promote, discharge, assign, reward or discipline, or to adjust grievances.

### **TOOLS AND EQUIPMENT USED; PROTECTIVE CLOTHING**

- All standard office equipment, hardware and software is used.

### **WORK ENVIRONMENT**

- Work is performed in a standard office environment where work pressures, disturbances of workflow and/or irregularities in the work schedule are expected and occur on an intermittent basis.

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- Minimal physical exertion. Frequent reaching, walking, standing, lifting, stooping, or carrying of equipment and materials. Lift and carry up to 10 pounds.
- Learned physical skill is required to perform keyboarding and 10-key functions.
- Changes in the performance environment require occasional upgrading of skills.

*The classification description indicates the general nature and level of work of positions grouped within this classification; it is not intended to be a comprehensive inventory of all duties and responsibilities, job specifications, work environment or other characteristics of a specific position. The classification description is not an employment agreement between the employee and Metro or Metro's visitor venues and is subject to change by Metro. Reasonable accommodations may be made to enable qualified individuals with disabilities to perform the essential duties.*