Sarasota County

SARASOTA COUNTY GOVERNMENT
Career Track

FISCAL CONSULTANT

SUB-CLASS CODE: See Below
EEO Code: 02
FLSA: Exempt
W/C Code: 8810
PAY BAND: Professional/Technical

MAJOR FUNCTION(S)

This is professional and advanced work in developing, implementing, updating, analyzing and maintaining a multi-year fiscal plan including Operating, Capital, Grants, Modeling, Debt, Revenue Forecasting, Legislative Analysis and Special Projects. Work exercises independent judgment and discretion for decision making. Job duties, functions and qualifications satisfy criteria for exempt status as outlined under the Administrative Exemption in the Fair Labor Standard Act (FLSA) Wage and Hour Regulations.

Primary Purpose		
Tier I Sub-Class Code 31501- Pay Grade 9931	Tier II * Sub-Class Code 31502- Pay Grade 9932	Tier III ** Sub-Class Code 31503- Pay Grade 9933
Duties and tasks are standardized. Resolves routine questions and problems; refers more complex issues to a higher level. ▪ Compiles & analyzes various statistical data and transactional information ▪ Monitors project budgets and tracks expenditure activity ▪ Conducts audits, prepares reports, and submits or presents recommendations to management ▪ Monitors programs & fiscal operations; ensures budgets are executed accurately ▪ Originates, submits, reviews eGendas ▪ Reviews procurement requests, CIP contract compliance and ensures proper payment applications & calculations ▪ Performs capital asset audits ▪ Reconciles cash processes ▪ Reviews & monitors contracts to assure conformity with laws & regulations ▪ Ensures compliance with HIPPA laws, Federal/Florida Statutes and other regulatory agencies and codes ▪ Provides guidance/training, to various levels of County personnel ▪ Collects field data; analyzes physical assets and inventoried storerooms ▪ Reviews monthly reconciliations ▪ Reviews bankrupty, foreclosure, and probate documents ▪ Coordinates bad debt write-off for depts ▪ Examines entries for correctness, prepares corrected entries, verifies information on records and documents ▪ Reviews/implements new technologies ▪ May serve as backup to co-workers and higher-level employees	**Duties and tasks are frequently non-routine. Resolves most questions and problems; refers more complex issues to a higher level.** ▪ Coordinates and leads special teams/ projects ▪ Develops/leads training opportunities for various levels of personnel ▪ Ensures compliance with federal, state, local laws and policies related to the budget ▪ Proposes techniques, models, and strategies for balancing the overall County budget ▪ Manages complex funds ▪ Performs periodic review of legislative and other outside impacts on business operations ▪ Provides support for County's Strategic Plan Goals. ▪ Provides fiscal guidance/oversight prior to transfer, interchange, expenditure and/or refund of funds ▪ Collaborates with Office of County Attorney & Procurement on contracts/ guidelines/inter-local legal documents ▪ Provides input on planning cycle, budget workshops, cost reduction, etc. ▪ Develops mechanisms to perform and respond to internal/external audits, risk assessments, operational reviews. ▪ Coordinates state and federal grants ▪ Oversees fiscal tasks ▪ Conducts reconciliation and analysis of vendor contracts ▪ Assists with budget preparation ▪ Participates in committee reviews ▪ Reviews eGenda packages	**Duties and tasks reflect substantial variety and complexity. May serve as a resource to others in the resolution of complex problems and issues.** ▪ May act as a team lead with input on hiring, evaluations, team goals/priorities ▪ Acts as a mentor/coach/trainer to others ▪ Performs advanced legislative analysis; develops alternate proposals; works with agencies in analysis of proposed impacts ▪ Analyzes projects that address contro-versial, unprecedented, sensitive issues ▪ Develops and conducts training to ensure succession planning and continuity of operations ▪ Develops draft fiscal policy ▪ Ensures compliance with TRIM process and other statutory requirements ▪ Frequently presents/develops information for the BCC, Administration, Directors ▪ Frequently collaborates with Office of the County Attorney and Procurement in the development of guidelines, contracts, inter-locals and other legal documents ▪ Performs debt-related tasks; works with bond counsel, rating agencies, Clerk, legal, etc. ▪ Develops/reviews various complex financial/rate models ▪ Prepares revenue forecasts ▪ Performs CPA level review of financial statements ▪ Manages federal, state and local grants; ensures compliance with all laws and ▪ Serves as liaison to various public boards
	*Tier II includes Tier I Duties	** Tier III includes Tier I & II Duties

Core Competencies (Knowledge, Skills and Abilities)		
Tier I	Tier II	Tier III
Communication and Program/Project Management Skills		
▪ Ability to be adaptable, set priorities, meet deadlines ▪ Ability to communicate unit/project policies, procedures and systems ▪ Ability to establish and maintain strong relationships ▪ Ability to communicate effectively (courtesy, sensitivity, tact, rapport, discretion) ▪ Ability to address difficult situations/issues professionally and tactfully ▪ Ability to investigate customer complaints, problems, and incidents, documenting them and ensuring prompt and satisfactory resolutions are reached ▪ Ability to organize and present information ▪ Uses sound independent judgment ▪ Ability to network internally and externally with customers ▪ Ability to perform duties in a fast pace/sometimes stressful environment	▪ Ability to manage/lead a unit project/program team, setting goals and managing timelines ▪ Ability to respond to high level, controversial issues ▪ Ability to educate and train internal/external customers ▪ Demonstrates excellent time management skills	▪ Ability to lead and facilitate meetings ▪ Ability to manage, plan, organize and coordinate program/project development ▪ Ability to present complex financial data in an understandable manner ▪ Ability to network internally across departments and with external customers ▪ Ability to think and communicate strategically and analytically ▪ Ability to coach, mentor and develop staff ▪ Ability to plan and provide leadership to staff in a manner conducive to efficient performance, high morale and customer satisfaction ▪ Ability to develop effective teamwork and encourage individuals to achieve their goals and objectives
All levels require ability to establish and maintain effective working relationships		
Budget/Fiscal Technical Skills		
▪ Knowledge of generally accepted accounting principles, governmental accounting, auditing, and financial reporting ▪ Knowledge of cost accounting principles and budgetary, financial and operational principles, procedures and practices ▪ Knowledge of County ordinances and resolutions and department-wide operations and activities ▪ Knowledge of various software applications ▪ Ability to define problems, collect data, establish facts, and draw valid conclusions ▪ Ability to interpret a variety of complex instructions furnished in written, oral, diagram, or schedule form	▪ Proficient skills in various software applications	▪ Knowledge of various statistical methods of forecasting/modeling ▪ Ability to work with complex financial formulas and models ▪ Ability to interpret the applicable laws and policies to produce financial impacts and scenarios ▪ Advanced skills in various software applications.

Minimum Qualifications		
Tier I	Tier II	Tier III
▪ BA or BS degree from an accredited college or university in Public Administration, Business, Finance, Economics, Statistics or other related field and minimum of 2 years of progressively responsible professional experience ▪ Government experience preferred ▪ A Master's degree in related field may be substituted for one year of the required experience ▪ Related professional experience or certifications may substitute for the required education	▪ BA or BS degree from an accredited college or university in Public Administration, Business, Finance, Economics, Statistics, or other related field and minimum of 3 - 4 years of progressively responsible professional experience ▪ Government experience preferred ▪ A Master's degree in related field may be substituted for one year of the required experience ▪ Related professional experience or certifications may substitute for the required education	▪ BA or BS degree from an accredited college or university in Public Administration, Business, Finance, Economics, Statistics, or other related field and minimum of 6 years of progressively responsible professional experience ▪ Government experience preferred ▪ A Master's degree in a related field may substitute for one year of the required experience ▪ A CPA license may substitute for one year of the required experience ▪ Related professional experience or certifications may substitute for the required education
NOTE: 30 college credits are considered equivalent to one year of college.		

NOTE: Employees that acquire the skills and minimum qualifications for the next level will be able to apply for promotional opportunities. Employees will not automatically be upgraded to the next level. Reclassifying a position is based on business need and financial impact and not based solely on the incumbent.

APPROVED BY: **DATE:**

Chris Louria Digitally signed by Chris Louria Date: 2021.10.26 10:31:52 -04'00'

10/26/21

Chris Louria, Chief Human Resources Officer

History: 11/4/19; 2/23/12; 11/3/11; 11/12/08