

# STATE OF MONTANA

## JOB DESCRIPTION

*Montana state government is an equal opportunity employer. The State shall, upon request, provide reasonable accommodation for otherwise qualified individuals with disabilities.*

**Job Title: Fiscal Liaison & Support Section Supervisor**      **Position Number: 07009**

**Location: Helena**      **Department: Transportation**

**Division and Bureau: Fiscal Services Division / Appropriations Management Bureau**

**Section and Unit: Fiscal Support Section**

### **Job Overview:**

This position serves as the Fiscal Liaison and Support Section Supervisor, acting as a primary link between the Fiscal Services Division and the Operational Programs, Districts, and other stakeholders. Responsible for coordinating and overseeing a range of professional services related to state and federal transportation project funding, development and implementation of fiscal plans and program objectives, project obligation and management, grant management, contracts, and program oversight. This position reports to the Appropriations Management Bureau Chief and supervises the Fiscal Liaison positions.

### **Essential Functions (Major Duties or Responsibilities):**

#### **Financial Analysis and Project Oversight – 30%**

- Represents Division interests at senior-level meetings, providing timely, accurate, and relevant technical/procedural input and feedback.
- Interprets and evaluates new guidance for impacts on existing tasks, processes, policies, and procedures; develops or recommends effective courses of action for incorporation into operations, collaborating with applicable Division/Agency staff as needed.
- Considers all aspects of state and departmental systems and the enterprise financial landscape when identifying and recommending operational or strategic changes aimed at increasing service effectiveness and efficiency. Coordinates and oversees training and mentoring of new staff to ensure seamless integration into applicable operations.
- Oversees process reviews aimed at improving efficiency, accuracy, and compliance, assessing recommendations for process modifications to ensure sustained effectiveness across Operational Programs, Districts, and other enterprise functions/areas of interest.

- Monitors monthly grant/project financial reports to ensure that transaction processing aligns with the corresponding grant/project authorization. Employs various strategies to identify erroneous transactions and initiates corrective action. Monitors timeliness of the closing process upon completion of the grant/project requirements.
- Assesses the results of in-depth tracking, analysis, and projections covering more complex financial information to ensure the work plans and programs across Operational Programs and Districts (1) comply with federal and state laws, statutes, and regulations and (2) follow MDT policies and procedures. Initiates follow-on discussion with stakeholders as needed.
- Actively listens to others when interpreting and solving technical issues; understands concepts to apply and explain them effectively. Reviews internal policies and procedures to ensure consistency and use of sound methodologies. Coordinates timely and relevant stakeholder training, facilitating knowledge transfer across functional areas.

### **Program Budget Development & Administration - 55%**

- Applies advanced skill and innovation while overseeing Operational Program and District budget management to ensure adherence to budget allocations, develops state and federal cost projections, and determines spending guidelines and budget modifications. Coordinates formulation of budget projections and addresses any complex discrepancies that arise.
- Actively leads efforts for continuous learning and keeps abreast of new developments that affect the technical/ professional work area.
- Coordinates evaluation and integration of financial requirements related to legislative appropriations, current and future program needs, and recommendations provided by program managers and other program personnel.
- Develops and administers the Operational Program and District budgets, fiscal management plans, and financial programs to ensure quality and cost-effective program delivery, compliance with applicable state and federal requirements, and efficient operations.
- Evaluates and integrates financial requirements related to legislative appropriations, current and future program needs, and recommendations provided by program managers and other program personnel.
- Plans, coordinates, and administers the Operational Program and District budget requests; assists with presentation and justification of the budget requests to the Director and legislature; develops testimony and responses for Governor's office and legislative requests; and directs the resolution of complex budgetary problems to ensure budgets reflect the current and anticipated needs and funding capabilities of the program.
- Manages the fiscal note development process for the Operational Program or District by evaluating proposed legislation, determining fiscal impacts, and providing impact documentation that effectively represents, promotes, and defends Department positions and perspectives on specific fiscal issues.
- Serves as the primary point of contact for Operational Program or District budget requests during the Executive Planning Process.

- Plays an integral role in the presentation and discussion of the Operational Program or District budgets and financial programs at recurring Program/District meetings, representing the Fiscal Services Division therein.
- Manages Operational Program or District budgets to ensure adherence to budget allocations, develops state and federal cost projections, and determines spending guidelines and budget modifications. Develops budget projections and resolves discrepancies to determine potential surpluses and deficiencies. Apprises Operational Program or District leadership of the changing financial status of various programs.
- Oversees and coordinates the Operational Program or District budget development process, assessing the fiscal impact of realized and potential business process changes. Coordinates budget adjustment requests and implements budget modifications.
- Coordinates and directs compliance reviews within the Operational Program, MDT Audit Services, and applicable federal agencies; synchronizes activities with designated Fiscal Services Division and Legislative Audit Division personnel.
- Guides the establishment and enforcement of processes and procedures for financial coordination between MDT and various entities including other state agencies, federal agencies, Tribal Governments, local governments, and private developers.

#### **Staff Supervision - 15%**

- Monitors compliance with established operational policies and procedures and achievement of goals through consultation with subordinate staff, personal review of program operations and project plans and through discussions with other Department staff and management. Ensures section procedural manuals are updated regularly.
- Evaluates, directs and coordinates the on-going operations and activities of the Section, including fiscal and accounting controls, to develop new processes and standards that promote integration, consistency and efficiency of various functions. Conducts workflow, cost and process analyses, determines specific areas of enhancement and develops and implements operational improvements.
- Directly manages professional staff by reviewing and revising overall work plans, priorities and procedures and monitoring progress through regular meetings and consultations. Conducts staff meetings, disseminates data and promotes information exchange for support and advancement of Division, Bureau and Section goals.
- Identifies staffing needs, recruits and hires employees and allocates staff to adequately support the on-going operations and activities of the Section.
- Determines training needs of section staff and prepares, presents or coordinates training through personnel specialists to ensure that modern technologies and operational strategies are available.
- Evaluates the performance of all positions directly supervised and completes performance evaluations. Recommends, implements and monitors corrective actions. Enforces disciplinary policies to ensure consistency in application of disciplinary actions.

- Ensures that Section staff complies with State and Departmental personnel rules, regulations and policies. Resolves grievances at the lowest level whenever possible.

### **Supervision**

The number of employees supervised: 8

The position number for each supervised employee: 40021, 60221, 60023, 22019, 33216, 21065, 15009, 40102

### **Physical and Environmental Demands:**

Works in a typical office environment.

### **Knowledge, Skills and Abilities (Behaviors):**

- Ability to develop and establish professional working relationships with other Department and state agency staff, internal and external stakeholders, and customers.
- Ability to apply expert, comprehensive, advanced knowledge of the theory, principles, practices and techniques of fiscal management.
- Knowledge and skillful application of concepts, principles, practices, and requirements relative to government finance, accounting, cost accounting, budgeting, and auditing.
- Knowledge of state and federal laws, statutes, and regulations; government accounting and other internal systems; state and federal grant procedures; state and federal budget and financial reporting requirements; and current economic and environmental trends and issues.
- Knowledge of the legislative process, federal funds management, contract management, and negotiation methods and techniques.
- Ability to conduct, apply, and translate research and analysis of relevant data into viable recommendations and support materials for decision makers.
- Ability to develop sound policies and accurately interpret laws and regulations.
- Demonstrated ability to develop and foster relationships with internal and external customers, to include conflict resolution skills.
- Capable use of research, problem solving, and forecasting techniques.
- Advanced communication skills when formulating and presenting required information or recommendations to internal or external stakeholders.
- Knowledge and skill covering the operation of program and financial management systems, as well as other relevant software applications.

### **Minimum Qualifications (Education and Experience):**

The required knowledge and skills are typically acquired through a combination of education and experience equivalent to a bachelor's degree in business or a related field.

This position requires a minimum of 4 years of accounting, budget or related fiscal experience. This position requires a minimum of 1 year of supervision or team lead experience.

Certifications, licensure, or other required credentials: n/a

Alternative qualifications: Any combination of additional related work experience and education equivalent to the minimum qualifications.

**Special Requirements:**

*List any other special required information for this position*

- ☐ Fingerprint check
- ☐ Valid driver’s license
- ☒ Background check
- ☐ Other; Describe
- Union Code
- Safety Responsibilities

The specific statements shown in each section of this description are not intended to be all inclusive. They represent typical elements and criteria considered necessary to perform the job successfully.

**Signatures**

My signature below indicates the statements in the job description are accurate and complete.

Immediate Supervisor

Title

Date

Administrative Review

Title

Date

My signature below indicates that I have read this job description.

Employee

Title

Date

**Human Resources Review**

**Job Code Title:**      **Job Code Number:**   **Level:**

My signature below indicates that Human Resources has reviewed this job description for completeness and has made the following determinations:

☐ FLSA Exempt

☒ FLSA Non-Exempt

☒ Telework Available

☐ Telework Not Available

☐ Classification Complete

☐ Organizational Chart attached

**Human Resources:**

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**Signature**

**Title**

**Date**