

**New York State Department of Civil Service**  
DIVISION OF CLASSIFICATION & COMPENSATION

Tentative Classification Standard

**Occ. Code 0213100**

**Education Finance Specialist 1, Grade 18 0213100**  
**Education Finance Specialist 2, Grade 23 0213200**  
**Education Finance Specialist 3, Grade 25 0213300**  
**Education Finance Specialist 4, M-2 0213400**

Brief Description of Class Series

Education Finance Specialists administer the fiscal activities of the State Education Department (SED) and school districts, Boards of Cooperative Educational Services, counties, libraries, colleges and universities, non-degree proprietary schools and local agencies that receive funds distributed by SED. Positions calculate financial support, authorize payments, audit and review fiscal transactions, advise and train funds recipients, analyze data, and prepare reports pertaining to education finance, and are only classified at SED.

Distinguishing Characteristics

*Education Finance Specialist 1:* full performance level; determines and distributes aid, grants, or assistance; advises and trains aid recipients on relevant procedures; audits financial transactions; and assists in analysis and reporting activities.

*Education Finance Specialist 2:* first supervisory level; oversees larger or more complex aid, grants, or assistance programs; advises aid or grant recipients on complicated procedures or policies; and supervises Education Finance Specialists 1 and other staff.

*Education Finance Specialist 3:* second supervisory level; supervises a team of Education Finance Specialists 1 and 2 or other related professionals in fiscal titles, or coordinates a multi-disciplinary work team or function.

*Education Finance Specialist 4:* directs a unit in the Chief Financial Office; supervises two or more Education Finance Specialists 3; and oversees a major multi-disciplinary work team or function.

## Related Classes

Budgeting Analysts prepare budget estimates, program justifications, workload forecasts, and expenditure reports, and monitor agency expenditures.

Auditors examine and appraise the accounting records and financial affairs of public, for profit and non-profit organizations and businesses for compliance with governing laws, rules, regulations, and contracts; determine the ability of the organization to conduct its programs efficiently and effectively; and evaluate internal controls and practices.

## Illustrative Tasks

### *Education Finance Specialist 1*

Collaborates with internal staff and financial support recipients on education funding mechanisms to ensure timely, accurate, and efficient funding activities.

Calculates and authorizes financial support including aid formulas, grants distributions, and aid or reimbursement payment schedules to program offices and local agencies.

Identifies and monitors the status of high-risk spending and those areas that are not maximizing the use of federal monies; and collects statistical and financial data on these program area activities and performance.

Monitors the flow documents from the program offices and local agencies, and develops and delivers tracing on federal documentation requirement and procedures.

Coordinates reviews and analysis activities with other State and federal agencies.

Reviews records for compliance with State and federal laws and regulations, and prepares reports on performance and activities for State and federal control agencies.

Provides technical assistance and training for program office staff on statute, regulations, policy and procedure, and the use of State and federal computer systems and software.

Participates in business process designing and revising, and implements new technology management systems.

### *Education Finance Specialist 2*

Communicates with program managers to ensure compliance with regulations and requirements, and with local, State, and federal officials regarding fiscal matters.

Provides assistance and information to school districts and the public.

Develops and delivers training to State and local agencies, schools, and educational providers.

Collects and evaluates data and procedures; and, prepares reports, and monitors provider activities and performance.

Reviews records for compliance with contracts, laws, and regulations.

Evaluates effectiveness and measures progress of program or SED objectives.

Supervises and directs professional and support staff.

#### *Education Finance Specialist 3*

Directs a team in the processing of all financial transactions related to SED's operations and programs.

Evaluates new guidelines to ensure that they do not conflict with current SED and bureau policies and procedures.

Reviews proposed legislation and other SED initiatives to determine effects on fiscal services.

Provides technical assistance to SED staff, management, and other individuals or groups.

Prepares reports and correspondence for management's signature.

Assists in developing unit policies and procedures.

Serves as liaison to program managers and various outside sources.

Directs the development of critical financial reports, record keeping, and automated systems.

Supervises and participates in the development of training programs for professional staff.

#### *Education Finance Specialist 4*

Oversees the processing, auditing, and accounting procedures pertinent to State and federal funds administered by SED.

Directs developmental and planning functions related to improvement of SED's fiscal services.

Coordinates activities of a program area to ensure that objectives are met.

Communicates with management of various educational and State agencies concerning issues related to SED programs.

Supervises the continuous review of funds available to SED and advises on their efficient utilization.

Ensures that all fiscal program operations and processes comply with SED management and accounting procedures, and advises and assists program staff with compliance.

### Minimum Qualifications

#### *Education Finance Specialist 1*

Open Competitive:

Bachelor's degree and satisfactory completion of a two-year traineeship; OR

Bachelor's Degree and two years of qualifying experience.\*

\*Experience is defined as calculating financial support, reviewing criteria and authorizing payments, auditing or reviewing fiscal transactions, monitoring and overseeing financial activity, or analyzing financial data in an educational entity regulated under federal or New York State education laws, rules, or regulations.

#### *Education Finance Specialist 2*

Promotion: one year of service as an Education Finance Specialist 1.

#### *Education Finance Specialist 3*

Promotion: one year of service as an Education Finance Specialist 2.

#### *Education Finance Specialist 4*

Promotion: one year of service as an Education Finance Specialist 3.

**Note:** Classification Standards illustrate the nature, extent and scope of duties and responsibilities of the classes they describe. Standards cannot and do not include all of the work that might be appropriately performed by a class. The minimum qualifications above are those which were required for appointment at the time the Classification Standard was written.

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