

**TOWN OF GILBERT  
CLASS SPECIFICATION  
Fiscal Specialist**

| <u>CLASS SERIES</u> | <u>BAND/GRADE/SUBGRADE</u> | <u>FLSA STATUS</u> |
|---------------------|----------------------------|--------------------|
| Fiscal              | B23                        | Non-Exempt         |

**CLASS SUMMARY:**

This class is the second level in the Fiscal series. Incumbents are responsible for developing fiscal documents; conducting research; reviewing documents for compliance with applicable policies and procedures; compiling and generating reports; administering assigned fiscal programming; providing customer service; and, training staff on fiscal policies, procedures and systems.

**ESSENTIAL DUTIES:**

*This class specification represents only the core areas of responsibilities; specific position assignments will vary depending on the needs of the department.*

**PERCENT OF  
TIME**

|  |               |
|--|---------------|
| Actively participates and accomplishes organizational, departmental and workgroup goals and objectives.  | Daily<br>100% |
| Exhibits a service orientation toward internal and external customers and maintains productive working relationships.  | Daily<br>100% |
| Prepares fiscal documents including forms, applications, correspondence, bills, notices, contract requirements, and/or bids. Monitors receipts and/or expenditures. Assists with completion of required documentation for fiscal processing. Updates and maintains information in fiscal systems and/or tracking logs. | Daily<br>30%  |
| Reviews information related to procurement, licensing, registration, tax reporting, professional service contracts, and/or other financial information. Verifies compliance with applicable policies, codes, regulations and ordinances.   | Daily<br>20%  |
| Provides customer service regarding requests and inquiries. Provides guidance to internal and external customers on fiscal procedures, processes and systems.  | Daily<br>20%  |
| Researches and interprets information, reconciles reports and resolves problems. Communicates research findings for further action or correction.  | Weekly<br>10% |
| Providings technical support and training to staff on fiscal policies, procedures and practices.   | Weekly<br>5%  |
| Compiles and generates statistical reports, trend reports, inventory listings, sales records, and/or journal entries.  | Monthly<br>5% |

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|   |               |
|---|---------------|
| May coordinate monthly activities such as surplus property auction, contract renewals, and/or preparing sales tax return. | Monthly<br>5% |
| Performs other duties of a similar nature and level as assigned.  | As Required   |

**TRAINING AND EXPERIENCE:**

Associate’s Degree and three years of related experience; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.

**LICENSING/CERTIFICATIONS:**

- May require a valid Arizona Driver’s License

**KNOWLEDGE OF:**

- Basic accounting principles and procedures;
- Applicable Federal, state and local laws, codes, ordinances and regulations;
- Mathematical concepts;
- Automated financial systems and spreadsheet software;
- Modern office equipment.

**SKILL IN:**

- Providing customer service;
- Performing mathematical calculations;
- Conducting research and solving problems;
- Monitoring activities and accounts for compliance with applicable laws, code, ordinances, rules and regulations;
- Working in a team environment;
- Monitoring accounts;
- Preparing fiscal reports and statements;
- Utilizing a computer and relevant software applications;
- Communication, interpersonal skills as applied to interaction with coworkers, supervisor, the general public, etc. sufficient to exchange or convey information and to receive work direction.

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### Fiscal Specialist

#### **ADA AND OTHER REQUIREMENTS:**

Positions in this class typically require: reaching, standing, walking, lifting, fingering, talking, hearing, seeing and repetitive motions.

Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

#### **WORKING TITLES WITHIN CLASS SPECIFICATION:**

Contract Specialist – B23  
Inventory Services Specialist – B23  
Purchasing Specialist – B23  
Accounting Specialist – B23  
Tax Compliance Specialist – B23

#### **NOTE:**

*The above job description is intended to represent only the key areas of responsibilities; specific position assignments will vary depending on the business needs of the department.*

#### **CLASS HISTORY INFORMATION:**

*Draft prepared by Fox Lawson & Associates LLC (BS)*

*Date: (10/12)*

*Draft finalized by Gilbert Human Resources (TT)*

*Date: (05/13)*