



**Code: 0223**

Family: Accounting and Finance

Service: Administrative

Group: Clerical, Accounting, and General Office

Series: Cash Receiving and Disbursing

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## **CLASS TITLE: MANAGER OF AUDIT AND FINANCE**

### **CHARACTERISTICS OF THE CLASS**

Under general direction, manages the administration of the City's budget for health and life insurance and related benefits for the City's employees and retirees, and performs related duties as required

### **ESSENTIAL DUTIES**

- Plans, develops, and implements policies, procedures, and systems to improve the efficiency of auditing operations, third party administrators, and vendors and to reduce insurance costs
- Directs professional auditing staff engaged in compiling and analyzing insurance benefits cost data
- Oversees the preparation of requests for proposals (RFPs) for insurance and benefits contracts
- Directs the compilation of cost projection data for use in the negotiation of contracts
- Supervises and guides the coordination of drafting and completing contracts with legal counsel and vendors
- Negotiates price, terms, and services of benefits contracts with insurers and administrators and recommends the contract award
- Authorizes payment to service providers for all services rendered
- Confers with City managers on problems and concerns regarding benefits services and procedures and develops plans to resolve same
- Performs annual annuitant healthcare cost reconciliation to determine necessary refunds
- Develops annual Direct Pay, Cobra, and annuitant contribution rate schedules based on projected annuitant healthcare costs (prepared by an independent consulting firm)
- Directs the preparation of budgetary (e.g., annual budgets, multi-year projections) and management reports
- Reviews and evaluates audit records and reports for expenditures and cost effectiveness
- Directs the generation and analysis of reports for possible cost control and savings opportunities

**NOTE:** *The list of essential duties is not intended to be inclusive; there may be other duties that are essential to particular positions within the class.*

### **MINIMUM QUALIFICATIONS**

#### **Education, Training, and Experience**

- Graduation from an accredited college or university with a Bachelor's degree in Business Administration, Public Administration, Accounting, Finance, or a related degree, supplemented by five years of progressively responsible managerial experience in the negotiation, administration, and financial auditing of benefits programs; or an equivalent combination of education and experience

#### **Licensure, Certification, or Other Qualifications**

- None

**WORKING CONDITIONS**

- General office environment

**EQUIPMENT**

- Standard office equipment (e.g., telephone, printer, photocopier, fax machine, calculator)
- Computers and peripheral equipment (e.g., personal computer, computer terminals, hand-held computer, modems)
- Adding machine

**PHYSICAL REQUIREMENTS**

- No specific requirements

**KNOWLEDGE, SKILLS, ABILITIES, AND OTHER WORK REQUIREMENTS****Knowledge**

Advanced knowledge of:

- \*policies, costs, services, risks, and limitations associated with benefits and insurance programs

Considerable knowledge of:

- budget preparation and management methods, practices, and procedures
- contract administration and management practices

Moderate knowledge of:

- \*applicable financial analysis principles, methods, practices, and procedures
- \*generally accepted accounting and auditing principles, methods, practices, and procedures
- \*research methods and procedures
- applicable computer software packages (e.g., accounting software, data management software) and applications

Some knowledge of:

- generally accepted fiscal policy principles, methods, practices, and procedures
- \*management and supervisory methods, practices, and procedures
- financial management principles, methods, practices, and procedures
- \*statistical analysis

Knowledge of applicable City and department policies, procedures, rules, regulations, and ordinances

Other knowledge as required for successful performance in the Assistant Manager of Audit and Finance class

**Skills**

- \*ACTIVE LISTENING - Give full attention to what other people are saying, take time to understand the points being made, ask questions as appropriate, and not interrupt at inappropriate times
- \*CRITICAL THINKING - Use logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions, or approaches to problems
- \*MATHEMATICS - Use mathematics to solve problems

- \*COMPLEX PROBLEM SOLVING - Identify complex problems and review related information to develop and evaluate options and implement solutions
- MANAGEMENT OF FINANCIAL RESOURCES - Determine how money will be spent to get the work done and account for these expenditures
- MANAGEMENT OF PERSONNEL RESOURCES - Motivate, develop, and direct people as they work and identify the best people for the job
- \*COORDINATION WITH OTHERS - Adjust actions in relation to others' actions
- INSTRUCTING - Teach others how to do something
- NEGOTIATION - Bring others together and trying to reconcile differences
- \*JUDGMENT AND DECISION MAKING - Consider the relative costs and benefits of potential actions to choose the most appropriate one
- \*SYSTEMS ANALYSIS - Determine how a system should work and how changes in conditions, operations, and the environment will affect outcomes

Other skills as required for successful performance in the Assistant Manager of Audit and Finance class

### **Abilities**

- COMPREHEND ORAL INFORMATION - Listen to and understand information and ideas presented through spoken words and sentences
- SPEAK - Communicate information and ideas in speaking so others will understand
- COMPREHEND WRITTEN INFORMATION - Read and understand information and ideas presented in writing
- WRITE - Communicate information and ideas in writing so others will understand
- REASON TO SOLVE PROBLEMS - Apply general rules to specific problems to produce answers that make sense
- REASON MATHEMATICALLY - Choose the right mathematical methods or formulas to solve a problem
- DEMONSTRATE ORIGINALITY - Come up with unusual or clever ideas about a given topic or situation, or to develop creative ways to solve a problem
- REACH CONCLUSIONS - Combine pieces of information to form general rules or conclusions (includes finding a relationship among seemingly unrelated events)

Other abilities as required for successful performance in the Assistant Manager of Audit and Finance class

### **Other Work Requirements**

- PERSISTENCE - Persist in the face of obstacles on the job
- LEADERSHIP - Demonstrate willingness to lead, take charge, and offer opinions and direction
- SELF-CONTROL - Maintain composure, keep emotions in check even in very difficult situations, control anger, and avoid aggressive behavior
- STRESS TOLERANCE - Accept criticism and deal calmly and effectively with high stress situations
- ADAPTABILITY/FLEXIBILITY - Be open to change (positive or negative) and to considerable variety in the workplace

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- **DEPENDABILITY** - Demonstrate reliability, responsibility, and dependability and fulfill obligations
- **ATTENTION TO DETAIL** - Pay careful attention to detail and thoroughness in completing work tasks

Other characteristics as required for successful performance in the Assistant Manager of Audit and Finance class

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All employees of the City of Chicago must demonstrate commitment to and compliance with applicable state and federal laws, and City ordinances and rules; the City's Ethics standards; and other City policies and procedures.

The City of Chicago will consider equivalent foreign degrees, accreditations, and credentials in evaluating qualifications.

\* May be required at entry.

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City of Chicago  
Department of Human Resources  
June 2009