

Job Description

Job Title: Lead - Financial Systems
Reports To: IT Manager - Application Development
Department: IT Applications Development
Division: Information Technology

Pay Range: IT09
FLSA Status: Exempt

SUMMARY: This position assists in providing leadership and expertise in the analysis, documentation, and implementation of finance systems. This role serves as a liaison between business stakeholders and technical teams to support the application environment and acts as the product owner and subject matter expert for Finance and related business areas. This role ensures project objectives are met, system functionality aligns with business needs, and all work is completed according to OPERS standards, timelines, and quality expectations.

ESSENTIAL FUNCTIONS:

1. Serves as product owner and subject matter expert for Finance and related business applications, including Microsoft Dynamics providing guidance on system capabilities and business needs.
2. Leads end-to-end business analysis, documenting the current processes, identifying requirements and gaps, defining future-state workflows, and recommending system and/or process improvements.
3. Manages the evaluation and selection of new financial system solutions, coordinating vendor reviews, demonstrations, and functional assessments to support decision-making.
4. Serves as the primary liaison with the ERP implementation partner to ensure clear requirements, aligned solution design, and OPERS-standard deliverables, while overseeing complete documentation of processes, specifications, configurations, and training materials.
5. Oversees solution configuration, development, and integration, ensuring adherence to system specifications, internal controls, architectural standards, and security requirements.
6. Plans, prioritizes, and coordinates project tasks, developing project schedules and aligning work across internal staff, business stakeholders, and vendor teams, Monitors the project progress, risks and issues, recommends resolution and escalating concerns as appropriate to ensure timely and successful delivery.
7. Leads testing activities, including development of test cases, coordination of user acceptance testing (UAT), issue tracking, and validation of system functionality prior to production release.
8. Supports data migration efforts, working with business and IT teams to validate data accuracy, completeness, and reconciliation throughout the transition.
9. Assists in developing file structures, forms, reports, data collection, processing, and control procedures to support Finance system needs.
10. Collaborates with business unit personnel throughout the system development lifecycle, ensuring requirements, testing, deployment, and change management activities are aligned.
11. Perform other duties as assigned.

Leadership

1. Directs daily activities of business, technical support or production team.
 2. Sets priorities for the team to ensure task completion and coordinates work activities with other supervisors.
 3. Provides feedback and input to management on task completion and staff performance.
 4. Provides leadership and is a role model to staff.
 5. Mentors staff to help improve performance and acquire new knowledge and skill.
 6. Partners with Human Resources on workforce planning, compliance, performance management, and corrective action.
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KNOWLEDGE, SKILLS, AND ABILITIES TO PERFORM ESSENTIAL FUNCTIONS*

Education

• High school diploma or GED	• <input checked="" type="checkbox"/> Required
• Bachelor's degree in related field OR Bachelor's degree in any field	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred

Direct relevant experience can be substituted for education (if applicable)

• 4 years of related experience in addition to the requirements in the Experience section below

Qualifications

• Strong collaboration skills	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Strong written and verbal communication skills	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Ability to react appropriately in stressful situations	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Strong problem-solving and analytical skills	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Ability to clearly communicate technical concepts to both technical and non-technical audiences	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Ability to maintain professional knowledge by attending industry conferences, training, and relevant professional development activities to support organizational advancement	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Demonstrate understanding and mastery of financial terms, definitions and functions	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Knowledge of key Finance processes such as General Ledger	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred

Experience

• At least 5 years' experience in designing and developing applications and/or Finance system implementation	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• At least 1 year of direct or indirect supervisory experience	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Demonstrated proficiency in the technologies listed in the skill set matrix below	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Experience in Documenting business requirements, process flows and system functionality	• <input checked="" type="checkbox"/> Required <input type="checkbox"/> Preferred
• Experience with Microsoft Dynamics	• <input type="checkbox"/> Required <input checked="" type="checkbox"/> Preferred
• Experience with implementation of ERP system for finance	• <input type="checkbox"/> Required <input checked="" type="checkbox"/> Preferred

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Certifications/Licenses

<ul style="list-style-type: none"> • PMP Certification 	<ul style="list-style-type: none"> • <input type="checkbox"/> Required <input checked="" type="checkbox"/> Preferred
<ul style="list-style-type: none"> • Scrum Master Certification 	<ul style="list-style-type: none"> • <input type="checkbox"/> Required <input checked="" type="checkbox"/> Preferred
<ul style="list-style-type: none"> • Professional Finance Certification (CPA, CFA or similar) 	<ul style="list-style-type: none"> • <input type="checkbox"/> Required <input checked="" type="checkbox"/> Preferred

Skills

Lead Programmer/Analyst Skill Matrix	
Relational Databases / SQL	Required
Microsoft 365, Teams	Required
Data analysis	Required
Microsoft Excel	Required
Software Development Life Cycle	Required
Technical writing	Required
Unit, Smoke, SIT and User Acceptance Testing	Required
Object Oriented Programming Design	Preferred
Agile Methodology	Preferred
Monday.com	Preferred
Data Warehousing	Preferred
DevOps	Preferred
Git	Preferred
MediaWiki	Preferred
Microsoft SQL Server Integration Services (SSIS)	Preferred
Microsoft SSRS	Preferred
Microsoft Visual Studio	Preferred
MS Project (or other PM Tracking)	Preferred

Physical Requirements* (if applicable)

<ul style="list-style-type: none"> • Select Physical Requirement

*Reasonable accommodations may be made to enable individuals with disability to perform the essential functions. If repetitive physical movement is required to perform the essential functions of the position, please discuss with HR

DISCLAIMER: The above statements are not intended to be construed as an exhaustive list of all duties, skills and responsibilities required.

Ohio Public Employees Retirement System