POSITION DESCRIPTIONS

# Chief Financial Officers

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POSITION DESCRIPTION

# Chief Financial Officer, Department of Agriculture

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| **OVERVIEW** |
| Senate Committee | Agriculture, Nutrition and Forestry  |
| Agency Mission | To facilitate the marketing of livestock, poultry, meat, cereals, oilseeds, and related agricultural products, and promote fair and competitive trading practices for the overall benefit of consumers and American agriculture. |
| Position Overview | The Chief Financial Officer serves as the principal advisor to the Secretary and Senior Officials on all matters related to financial management, financial management systems, financial control and accounting, internal control and assessment, and financial management training. |
| Compensation | Level IV $160,300 (5 U.S.C. § 5315) |
| Position Reports to | Secretary of Agriculture  |
| **RESPONSIBILITIES** |
| Management Scope | The Office of the Chief Financial Officer is responsible for the financial leadership of an enterprise that in FY 2015 had 94,265 employees and a budget authority of $142 billion. The department has 14,000 offices and field locations and $208 billion in assets. |
| Primary Responsibilities | * Financial system management policy and the provision of timely, accurate, and reliable information from financial systems
* Development of financial statements, cost accounting policy, and financial management budgets
* Policy guidance and oversight of the Department's internal controls and management accountability programs and reporting to ensure adequate controls over Department assets
* Oversight of the Departmental Working Capital Fund (WCF)
* Providing policy guidance and oversight of the travel system, grants management, cash and credit management operations, and other financial management functions.
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Managing the financial execution of the agency budget and actual expenditures
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Knowledge of federal budget formulation
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
 |
| Competencies | * Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| Jon Holladay (2014-present) – Deputy Chief Financial Officer at the USDA; USDA’s Associate Chief Financial Officer for Financial Policy and Planning; Supervisory Program Analyst in the Office of the CFO, detailed to the USDA’s National Finance Center as the Acting Deputy Director; Supervisory System Accountant in the Office of the CFO |
| Evan J Segal (2009) – Executive In Residence at Carnegie Mellon Tepper School of Business; President/Owner of Dormont Manufacturing Company; Strategic Planning/Marketing at Scott Paper |
| Charles R. Christopherson (2007-2009) – Board of Directors for Commodity Credit Corporation; Board of Directors Chair of the Finance and Compensation Committee at The Graduate School; President of CB Solutions LLC; Group VP of Operations & Finance, South Central at Encompass Services, Inc.; COO & CFO at Lantech; Vice President COO and CFO at ICG Communications - Fiber Optic Technology |

Note: Unless otherwise cited, this information was adapted from interviews with the Partnership for Public Service’s CFO SAGE (Strategic Advisor to Government Executives) community and public websites.

POSITION DESCRIPTION

# Chief Financial Officer and Assistant Secretary for Administration, Department of Commerce

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| **OVERVIEW** |
| Senate Committee | Commerce, Science, and Transportation  |
| Agency Mission | To create the conditions for economic growth by promoting job creation, sustainable development and improved standards of living for all Americans, and by working in partnership with businesses, universities, communities and our nation's workers. |
| Position Overview | The Chief Financial Officer and Assistant Secretary for Administration (CFO/ASA) oversees the Commerce Department’s financial resources, human resources, and facilities; Establishes and monitors implementation of departmental policies and procedures for administrative functions affecting program operations in Commerce’s operating units; Coordinates implementation of government-wide and departmental management initiatives. |
| Compensation | Level IV $160,300 (5 U.S.C. § 5315) |
| Position Reports to | Secretary of Commerce and Deputy Secretary of Commerce  |
| **RESPONSIBILITIES** |
| Management Scope | The department employed approximately 40,720 FTE and operated under a $13.99 billion budget in FY 2015. The following offices fall within OCFO/ASA: The Office of Security, the Office of Human Resources Management, the Office of Civil Rights, the Office of Financial Management, the Office of Facility and Environmental Quality, the Office of Acquisition Management, the Office of Program Evaluation and Risk Management, the Office of Privacy and Open Government, and the Office of Budget. |
| Primary Responsibilities | The CFO/ASA oversees the establishment and execution of departmental policies and procedures for administrative functions affecting program operations in Commerce’s operating units. The CFO/ASA is responsible for ensuring these administrative functions are performed in accordance with all applicable laws and regulations, support the efficient and effective delivery of program outcomes and are delivered at the highest customer service standards. These administrative functions include: * Developing and maintaining integrated accounting and financial management systems
* Developing budgets that support all agency missions
* Managing the financial execution of the agency budget and actual expenditures
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management

 As well as* Procurement and small business utilization
* Grants management
* Travel and transportation
* Real property and facilities management
* Directives management
* Security
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Knowledge of federal budget formulation
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
 |
| Competencies | * Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| Ellen Herbst (2013-present) – Senior Advisor to the Deputy Secretary of Commerce; Director of Commerce’s National Technical Information Service; Vice President of Sales and Marketing at Spectra Systems; Business Manager at the DuPont Company |
| Scott Quehl (2009-2013) – Senior Managing Director, Public Resources Advisory Group; Managing Director, Head of Tax-Exempt Capital Markets Mid-Atlantic Group and Co-Head of the Infrastructure Advisory Group at JP Morgan Securities, Inc.; Managing Director, Public Financial Management Group; CFO, Metropolitan Police Department of Washington, DC; Special Assistant to the Controller of the Office of Federal Financial Management within OMB |
| Otto J. Wolff (2001-2009) – Staff Member of the Committee on House Administration; Deputy Assistant Secretary for Administration of the US Department of Commerce during the George HW Bush Administration; Assistant to the Secretary of the United States Air Force |
| Linda J. Bilmes (1999-2001) – Deputy Assistant Secretary for Administration and Budget at the Department of Commerce; US Commissioner for the Commission on Inter-American Investment at the Inter-American Development Bank; Principal at the Boston Consulting Group, London  |

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POSITION DESCRIPTION

# Controller, Office of Federal Financial Management, Executive Office of the President

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| **OVERVIEW** |
| Senate Committee | Homeland Security and Governmental Affairs |
| Agency Mission | To promote and support first class financial management in the executive branch of the federal government. |
| Position Overview | As the statutory head of financial management in the Federal Government, the Controller directs and oversees CFOs government-wide in carrying out substantial portions of their responsibilities. |
| Compensation | Level III $170,400 (5 U.S.C. § 5314) |
| Position Reports to | Deputy Director for Management at the Office of Management and Budget |
| **RESPONSIBILITIES** |
| Management Scope | The number of FTE in the Office of Federal Financial Management in FY 2015 was 15. OMB’s enacted FY 2015 budget was $91.75 million and included 457 FTE. However, the Controller directs and oversees CFOs government-wide. |
| Primary Responsibilities | The Controller of the Office of Federal Financial Management shall be the deputy and principal advisor to the Deputy Director for Management in the performance by the Deputy Director for Management of the following functions:* Provide overall direction and leadership to the executive branch on financial management matters by establishing financial management policies and requirements, and by monitoring the establishment and operation of Federal Government financial management systems.
* Review agency budget requests for financial management systems and operations, and advise the Director on the resources required to develop and effectively operate and maintain Federal Government financial management systems and to correct major deficiencies in such systems.
* Review and, where appropriate, recommend to the Director changes to the budget and legislative proposals of agencies to ensure that they are in accordance with financial management plans of the Office of Management and Budget.
* Monitor the financial execution of the budget in relation to actual expenditures, including timely performance reports.
* Oversee, periodically review, and make recommendations to heads of agencies on the administrative structure of agencies with respect to their financial management activities.
* Develop and maintain qualification standards for agency Chief Financial Officers and for agency Deputy Chief Financial Officers.
* Provide advice to agency heads with respect to the selection of agency Chief Financial Officers and Deputy Chief Financial Officers.
* Provide advice to agencies regarding the qualifications, recruitment, performance, and retention of other financial management personnel.
* Assess the overall adequacy of the professional qualifications and capabilities of financial management staffs throughout the Government and make recommendations on ways to correct problems which impair the capacity of those staffs.
* Settle differences that arise among agencies regarding the implementation of financial management policies.
* Chair the Chief Financial Officers Council.
* Communicate with the financial officers of state and local governments, and foster the exchange with those officers of information concerning financial management standards, techniques, and processes. (31 U.S.C. § 503)
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Demonstrated ability and practical experience in accounting, financial management, and financial systems; and
* Extensive practical experience in financial management in large governmental or business entities. (31 U.S.C. § 504)
* Risk management experience
* Knowledge of the department’s functions and policies
* Knowledge of federal budget formulation
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
 |
| Competencies | * Demonstrated ability to resolve conflicts within a large organization
* Comfortable leading and managing in ambiguity, as deputy secretaries often have very vague or undefined statutory responsibilities and authorities
* Ability to establish positive relationships with coworkers and external stakeholders
* Ability to forge strong Congressional relationships preferred
 |
| **PAST APPOINTEES** |
| David Mader (2014-present) – Senior Vice President of Booz Allen Hamilton, where he led the firm’s business in support of the Department of the Treasury; Assistant Deputy Commissioner for the IRS |
| Linda Springer (2003-2005) – Senior Vice President and Controller at Provident Mutual; Vice President and Product manager at Penn Mutual Life Insurance Company |

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POSITION DESCRIPTION

# Chief Financial Officer, Department of Homeland Security

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| **OVERVIEW** |
| Senate Committee | Homeland Security and Governmental Affairs |
| Agency Mission | To ensure that homeland is safe, secure, and resilient against terrorism and other potential threats. |
| Position Overview | The Office of the Chief Financial Officer (OCFO) is responsible for the fiscal management, integrity and accountability of the Department of Homeland Security (DHS). The mission of the OCFO is to provide guidance and oversight of the department’s budget, financial management, financial operations for all departmental management and operations, the DHS Working Capital Fund, grants and assistance awards, and resource management systems to ensure that funds necessary to carry out the department’s mission are obtained, allocated, and expended in accordance with the department’s priorities and relevant law and policies. |
| Compensation | Level IV $160,300 (5 U.S.C. § 5315) |
| Position Reports to | Secretary and Deputy Secretary of Homeland Security  |
| **RESPONSIBILITIES** |
| Management Scope | The Office of the CFO of the Department of Homeland Security directly managed $86.09 million and 187 FTE according to the revised enacted budget for FY 2015. However, the CFO oversees the financial management of the entire department. In FY 2015, the Department of Homeland Security total budget authority was $63.506 billion and the total FTE were 217,837. The Office of the CFO is comprised of: * the Budget Division,
* the Program Analysis and Evaluation Division,
* the Office of Financial Operations Division,
* the Financial Management and Policy Division,
* the Internal Control Management Division,
* the Resource Management Transformation Office (Financial Systems Division),
* Financial Assistance Policy & Oversight,
* the Departmental GAO/OIG Audit Liaison Office, and
* the Workforce Development Division
 |
| Primary Responsibilities | * Developing and maintaining integrated accounting and financial management systems
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Managing the financial execution of the agency budget and actual expenditures
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
 |
| Competencies | * Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| Chip Fulghum, (2014-present) – US Air Force officer for 28 years, rising to the rank of Colonel; graduate of the Air War College, the Air Command and Staff College, and the Professional Military Comptroller School |
| Margaret Ann Sherry, (2012-2013) – Deputy CFO, DHS; Director of Financial Management, DHS; Deputy CFO, United States Holocaust Memorial Museum; Auditor, GAO |
| David Norquist, (2006-2008) – Deputy Under Secretary of Defense (Comptroller), DOD; Staff, House Appropriations Committee |
| Andrew Maner, (2004-2006) – Chief of Staff to US Customs Commissioner Robert C. Bonner; asked to direct and manage the merger of the four component agencies of CBP: US Customs, US Border Patrol, INS Inspections, and Agriculture & Quarantine Inspections; served in the White House Office of Advance; Staff Assistant under Press Secretary Marlin Fitzwater |

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POSITION DESCRIPTION

# Under Secretary of Defense (Comptroller), Department of Defense

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| **OVERVIEW** |
| Senate Committee | Armed Services Committee |
| Agency Mission | The mission of the Department of Defense is to provide the military forces needed to deter war and to protect the security of our country. |
| Position Overview | The Under Secretary of Defense (Comptroller) is the principal advisor to the Secretary of Defense on all budgetary and fiscal matters, including the development and execution of the Department of Defense’s (DoD) annual budget. As Chief Financial Officer, the Comptroller oversees DoD’s financial policy, financial management systems, and business modernization efforts.  |
| Compensation | Level IV, $160,300 (5 U.S.C. § 5315) |
| Position Reports to | Secretary of Defense  |
| **RESPONSIBILITIES** |
| Management Scope | The Comptroller is responsible for management and accountability of the entire DoD budget. In FY 2015, the Department of Defense budget was $560.4 billion dollars and the total number of civilian FTEs was 756,334. Pursuant of this task, the Comptroller exercises authority, direction, and control over DoD’s two principal financial organizations: the Defense Contract Audit Agency and the Defense Finance and Accounting Service, the world’s largest finance and accounting operation. The Comptroller also oversees the Financial Management Modernization Executive Committee. |
| Primary Responsibilities | * Serve as the principal advisor to the Secretary of Defense on budgetary and fiscal matters.
* Manage, oversee, and develop DoD’s annual budget. Supervise and direct the preparation of budget estimates for DoD.
* Establish and supervise the execution of principles, policies, and procedures to be followed in connection with organizational and administrative matters relating to: the preparation and execution of budgets; fiscal, cost, operating, and capital property accounting; and progress and statistical reporting.
* Establish and supervise the execution of policies and procedures relating to the expenditure and collection of funds administered by DoD.
* Ensure that each of the congressional defense committees is informed, in a timely manner, regarding all matters relating to the budgetary, fiscal, and analytic activities of DoD that are under Comptroller supervision.
* Develop and maintain integrated accounting and financial management systems
* Oversee the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implement agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Strong substantive expertise in military affairs and strategy
* Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
* Knowledge of federal budget formulation
 |
| Competencies | * High level of energy for extensive foreign and domestic travel and interactions
* Ability to clearly articulate complex budget issues
* Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| Robert F. Hale (2009-2014) – Executive Director, American Society of Military Comptrollers; Assistant Secretary, Air Force; Head of the National Security Division, Congressional Budget Office; Head of Acquisition and Grants Management, LMI; Active Duty Officer, U.S. Navy |
| Tina Jonas Shivers (2004-2008) – Assistant Director and the Chief Financial Officer of the FBI; Deputy Under Secretary of Defense for Financial Management; Professional Staff Member for House Committee on Appropriations, Defense; senior Budget Examiner in the Intelligence Branch of the National Security Division in OMB |
| Dov Zakheim (2001-2004) – CEO, SPC International (subsidiary of System Planning Corporation); Consultant, DOD; Deputy Undersecretary of Defense for Planning and Resources, DOD; Principal Analyst, Congressional Budget Office |

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POSITION DESCRIPTION

# Chief FInancial Officer, Department of Education

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| **OVERVIEW** |
| Senate Committee | Health, Education, Labor, and Pensions |
| Agency Mission | To promote student achievement and preparation for global competitiveness by fostering educational excellence and ensuring equal access. |
| Position Overview | The Chief Financial Officer provides overall financial management responsibilities for all Department programs, including the budget office. He or she provides advice and other assistance to the head of the executive agency and other senior management personnel of the executive agency to ensure that information technology is acquired and information resources are managed for the executive agency in a manner that implements the policies and procedures of this division. |
| Compensation | Level IV $160,300 (5 U.S.C. § 5315) |
| Position Reports to | Secretary of Education  |
| **RESPONSIBILITIES** |
| Management Scope | The Chief Financial Officer oversees the Office of the Chief Financial Officer (OCFO), and the divisions within the organization: Financial Improvement and Post-Audit Operations, Contracts and Acquisitions Management, and Financial Management Operations. The 2015 Department of Education Budget was $67.135 billion in discretionary spending, $20.378 billion in mandatory spending, and had 4,081 FTE. The Chief Financial Officer specifically oversaw 182 FTE. |
| Primary Responsibilities | * Developing and maintaining integrated accounting and financial management systems
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Managing the financial execution of the agency budget and actual expenditures
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
* Serves as the principal advisor to the Secretary and Senior Officials on all matters related to financial management, financial management systems, financial control and accounting, cooperative agreements and acquisition management and related training.
* Oversees credit management issues and trends relative to student financial assistance programs and makes recommendations and develops alternative strategies based on sound principles of credit and financial management.
* Develops, manages, and provides policy guidance and oversight of the Department's fiscal management activities and operations. Provides leadership and direction in the areas of internal control and assessment, financial management training, post audit activities, debt collection, and indirect cost determination.
* Prepares and transmits reports on Chief Financial Officer functions to the Secretary, the Congress, and OMB.
* Fulfills the responsibilities of the Chief Acquisition Officer.
* Develops, manages, and provides regulatory, policy, and procedural guidance and oversight to the Department’s acquisition system and completes acquisition management reporting requirements.
* Establishes and maintains requirements for acquisition workforce development and career management.
* Manages the Department's contracts and purchasing activities.
* Coordinates the implementation of ED Regulations for the Protection of Human Subjects in extramural and intramural research projects
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Higher-Ed and/or K-12 background
* Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
 |
| Competencies | * Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| Thomas P. Skelly (2008 to Present) acting – Director of the Budget Service in the U.S. Department of Education; chair of the government wide Budget Officers Advisory Council |
| Lawrence Warder (2006 to 2008) – worked with a private foundation and the Austin School District to increase access to Advance Placement classes; unpaid consultant to the University of Texas to improve their internal audit and compliance system; 33-year accounting and management career with Deloitte and Touche |
| Jack Martin (2002 to 2005) Acting – chief executive officer of Home Federal Savings Bank of Detroit; CEO of Jack Martin & Co. P.C.; founder and chairman of Martin, Arrington, Desai & Meyers, P.C. in Bingham Farms; chairman of the Provider Reimbursement Review Board at the U.S. Department of Health and Human Services |

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POSITION DESCRIPTION

# Chief Financial Officer, Department of Energy

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| **OVERVIEW** |
| Senate Committee | Energy and Natural Resources  |
| Agency Mission | To ensure America's security and prosperity by addressing its energy, environmental and nuclear challenges through transformative science and technology solutions. |
| Position Overview | The mission of the Office of the Chief Financial Officer is to assure the effective management and financial integrity of Department of Energy programs, activities, and resources by developing, implementing and monitoring department-wide policies and systems in the areas of budget administration, program analysis and evaluation, finance and accounting, internal controls, corporate financial systems, and strategic planning. |
| Compensation | Level IV $160,300 (5 U.S.C. § 5315) |
| Position Reports to | Secretary of Energy and Deputy Secretary of Energy  |
| **RESPONSIBILITIES** |
| Management Scope | In FY 2015, the Department of Energy had a budget of $27.391 billion. The Office of the Chief Financial Officer had an FY 2015 budget of $47 million. The OCFO houses the Office of Finance and Accounting, the Office of Budget, and the Office of Corporate Information Systems. However, the CFO oversees the financial management of the entire department. |
| Primary Responsibilities | The CFO primary functions include:* Serve as the principal advisor to the Secretary and other departmental officials on matters relating to the department's financial resources
* Provide for and assure the financial integrity, formulation, execution, and analysis of the department's annual and multi-year budget.
* Develop and maintain an integrated agency-wide financial accounting system, including systems for cash management, credit management, and debt collection, with appropriate financial reporting and internal controls.
* Provide for consolidated finance and accounting services.
* Plan and perform department-wide reviews to determine compliance with the requirements of the Federal Managers' Financial Integrity Act and Departmental accounting and financial policy.
* Provide required reports which include a description and analysis of the status of financial management in the department, annual financial statements, audit reports, and internal accounting and administrative controls systems.
* Manage departmental payroll services and, as appropriate, cross-servicing to other federal agencies.
* Plan for and develop the Department of Energy Strategic Plan.
* Serve as liaison to the Office of Management and Budget (OMB) and to the Congressional Appropriations Committees for all matters related to the departmental budget.
* Provide oversight and guidance to field offices on financial management activities.
* Budget for and maintain the Department of Energy Working Capital Fund.
* Review and make recommendations on Mission Need Statements (Critical Decision-0) for proposed acquisition of new capital assets.
* Develop program performance measures, manage the department's performance tracking system, and serve as the department's principal advocate for improved performance management.
* Oversee the recruitment, selection and training of personnel to carry out agency financial management functions, as well as manage, train and provide policy guidance and oversight of these personnel and their activities
* Take the lead role in enterprise risk management
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Knowledge of federal budget formulation
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
 |
| Competencies | * Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| Joseph Hezir (2014-present) – Research Engineer and Executive Director of The Future of Solar Energy Study at MIT’s Energy Initiative; Vice President and Managing Partner of EOP Group, Inc.; Executive Vice President of EOP Education, LLP, and EOP Foundation, Inc. |
| Steven Jeffrey Isakowitz (2007-2013) – Deputy Associate Administrator for the Exploration Systems Mission Directorate at NASA; Science and Space Programs Branch Chief at the Office of Management and Budget |
| Susan Johnson Grant (2004-2007) – Chief Financial Officer and Director of Corporate Resources for the Defense Finance and Accounting Service |
| Bruce Marshall Carnes (2001-2004) – Deputy Director of Defense Financing and Accounting Services at the Department of Defense; Director of Planning, Budget, and Administration at the Office of National Drug Control Policy; Deputy Under Secretary of Education |

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POSITION DESCRIPTION

# Assistant Secretary for Financial Resources, Department of Health and Human Services

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| **OVERVIEW** |
| Senate Committee | Finance |
| Agency Mission | To enhance and protect the health and well-being of all Americans by providing effective health and human services and fostering advances in medicine, public health, and social services. |
| Position Overview | The mission of the Assistant Secretary for Financial Resources (ASFR) is to advise the Secretary on all aspects of budget, grants, financial management and acquisition and to provide for the direction of these activities throughout HHS. The ASFR also coordinates HHS' implementation and reporting regarding the American Recovery and Reinvestment Act (Recovery Act).The Assistant Secretary for Financial Resources has several formal and informal roles, including Chief Financial Officer (CFO), Chief Acquisition Officer, HHS audit follow-up official, and lead official for budget and grants. The Assistant Secretary is a close advisor to the Secretary on policy issues. |
| Compensation | Level IV $160,300 (5 U.S.C. § 5315) |
| Position Reports to | Secretary and Deputy Secretary of Health and Human Services |
| **RESPONSIBILITIES** |
| Management Scope | The Department of Health and Human Services is one of the largest Cabinet agencies in government, which as of 2015 had 75,567 FTEs and a budget authority of $1.045 trillion. The ASFR accomplishes its work through its component offices:* Immediate Office of the Assistant Secretary (AM)
* Office of Budget (AML)
* Office of Executive Program Information (AMW)
* Office of Finance (AMS)
* Office of Grants and Acquisition Policy and Accountability (AMT)

However, the CFO oversees the financial management of the entire department.  |
| Primary Responsibilities | * Developing and maintaining integrated accounting and financial management systems
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Developing budgets that support all agency missions
* Managing the financial execution of the agency budget and actual expenditures
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Knowledge of federal budget formulation
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
 |
| Competencies | * Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| Ellen Murray (2010-present) – Staff Director for the US Senate Appropriations Subcommittee on Labor, Health and Human Services, Education and Related Agencies; served in the budget office and the Office of the General Counsel at HHS; economist at the Social Security Administration |
| Charles E. Johnson (2005-2009) – President of Huntsman Cancer Foundation and Vice President of Huntsman, LLC; member of the Utah State Board of Regents, and Chair of the Board from 1997-2002; Vice Chairman of the Board for Strategic Direction with the Garff-Warner Organization; Chief of Staff to the Governor of the state of Utah; Board of Directors of KPMG, and Chairman of the Merger Transition Committee |
| Janet Hale (2001-2005) – Program Associate Deputy for General Government at the Office of Management and Budget; Chief Financial Officer of the US House of Representatives; Assistant Secretary of Budget at the US Department of Transportation; Deputy Assistant Secretary of Policy and Budget at the US Department of Housing and Urban Development |
| John Joseph Callahan (1995-2001) – Vice Chairman of the Chief Financial Officers; Staff Director for the Senate Subcommittee on Intergovernmental Relations; Deputy Staff Director of the Senate Budget Committee; Chief of Staff for Sen. James Sasser; Assistant Professor of Education and Planning at the University of Virginia |

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POSITION DESCRIPTION

# Chief Financial Officer, Department of Housing and Urban Development

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| **OVERVIEW** |
| Senate Committee | Banking, Housing and Urban Affairs  |
| Agency Mission | Create strong, sustainable, inclusive communities and quality, affordable homes for all. |
| Position Overview | The Chief Financial Officer serves as the principal advisor to the Secretary on financial management and is the senior departmental official responsible for establishing and implementing policies to govern all aspects of financial management in the Department, including overseeing the development and implementation of the HUD budget. |
| Compensation | Level IV $160,300 ([5](http://uscode.house.gov/view.xhtml?hl=false&edition=prelim&req=granuleid%3AUSC-prelim-title5-section5313&num=0&saved=%7CKHRpdGxlOjUgc2VjdGlvbjo1MzExIGVkaXRpb246cHJlbGltKSBPUiAoZ3JhbnVsZWlkOlVTQy1wcmVsaW0tdGl0bGU1LXNlY3Rpb241MzExKQ%3D%3D%7CdHJlZXNvcnQ%3D%7C%7C0%7Cfalse%7Cprelim) U.S.C. § 5314) |
| Position Reports to | Secretary of HUD |
| **RESPONSIBILITIES** |
| Management Scope | In FY 2015 the HUD budget was $44.115 billion with 8,260 FTEs and regional and field offices located throughout the nation. |
| Primary Responsibilities | * Developing and maintaining integrated accounting and financial management systems
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Managing the financial execution of the agency budget and actual expenditures
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
* Developing budgets that support all agency missions
* Develop a strong internal control program and address material weaknesses in the Department
* Produce audited consolidated financial statements
* Develop uniform financial management policies and procedures
* Process accounting transactions and payments
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Developing and maintaining integrated accounting and financial management systems
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Managing the financial execution of the agency budget and actual expenditures
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
* Knowledge of federal budget formulation, including OMB and CBO, as well as the federal regulatory rulemaking process.
* Be of the highest moral and ethical character, competent, trustworthy, focused, exercise good judgment, and energized.
* Be knowledgeable regarding government accounting principles and reporting, including GASB.
 |
| Competencies | * Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| The position is currently vacant. Brad Huther was appointed CFO in 2014, but passed away in 2015. He served as senior advisor in the U.S. Patent and Trademark Office; Senior Director at the U.S. Chamber of Commerce; president and CEO of the International Intellectual Property Institute; consultant and later a special attaché for the World Intellectual Property Organization; Deputy Director and Chief Operating Officer of the U.S. Census Bureau |
| Douglas A. Criscitello (2010 to 2011) – Director at PricewaterhouseCoopers where he assisted the firm in the establishment of a public sector financial services practice; Executive Director at JPMorgan Securities, Inc. where he provided operational, investment banking, and financial advisory services to U.S. government agencies; worked extensively with U.S. credit agencies in roles at the Small Business Administration, Office of Management and Budget, and Congressional Budget Office |
| John W. Cox (2006 to 2009) – CFO of BMC Software, Inc.; Chairman of the Audit Committee for Benchmark Electronics |

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POSITION DESCRIPTION

# Assistant Secretary for Policy, Management, and Budget, Department of the Interior

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| **OVERVIEW** |
| Senate Committee | Energy and Natural Resources |
| Agency Mission | To protect and manage the nation's natural resources and cultural heritage; provide scientific and other information about those resources; and honor its trust responsibilities or special commitments to American Indians, Alaska Natives, and affiliated island communities. |
| Position Overview | The Office of the Assistant Secretary for Policy, Management and Budget serves as the enterprise management entity responsible for providing overall policy direction, leadership, guidance, and assistance on a broad range of management and operational issues that directly affect the Interior Department's ability to fulfill its mission. The Assistant Secretary serves in a number of statutorily designated positions and is the agency's Chief Financial Officer, Chief Acquisition Officer, Chief Human Capital Officer, and Chief Performance Officer. |
| Compensation | Level IV $160,300 (5 U.S.C. § 5315) |
| Position Reports to | Secretary and Deputy Secretary of the Interior  |
| **RESPONSIBILITIES** |
| Management Scope | The Assistant Secretary has responsibility for major operational components that support Interior-wide functions, including the Interior Business Center, Office of Valuation Services, Office of Aviation Services, Natural Resource Damage Assessment program, Central Hazardous Materials Fund, and the Payments in Lieu of Taxes program. The AS-PMB also oversees the Wildland Fire program in coordination with the three land management bureaus and the Bureau of Indian Affairs.The actual FY 2015 departmental operations budget for the Office of the Assistant Secretary for Policy, Management, and Budget was $3.753 million with 25 FTE. However, the CFO oversees the financial management of the entire department. The Department of the Interior has more than 70,000 employees and an annual budget of approximately $12 billion. |
| Primary Responsibilities | * Developing and maintaining integrated accounting and financial management systems
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Developing budgets that support all agency missions
* Managing the financial execution of the agency budget and actual expenditures
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
* Ensuring departmental compliance with legislative and regulatory requirements related to annual appropriations bills and related to department-wide functions such as performance, finance, acquisition and property management, budget, general management, administration, civil rights, and equal access
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Knowledge of federal budget formulation
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
 |
| Competencies | * Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| Kris Sarri (acting) (2014-present) – Deputy Director of the Office of Policy and Strategic Planning at the Department of Commerce; senior member of the Democratic professional staff of the US Senate Commerce, Science, and Transportation; Senior Policy Advisor for appropriations, energy, and environmental issues for Senator Reed (D-RI); Legislative Director of the Northeast-Midwest Senate Coalition |
| Rhea Suh (2009-2014) – managed a $200 million program dedicated to environmental conservation and clean energy at the David and Lucile Packard Foundation; worked at the William and Flora Hewlett Foundation; launched the New Constituencies portfolio to focus on environmental issues for underserved populations in the US while at the Hewlett Foundation; senior legislative assistant to Senator Ben Campbell |
| R. Thomas Weimer (2005-2009) – Principal Deputy Assistant Secretary and Acting Assistant Secretary for Water and Science at the US Department of Interior; Chief of Staff to Secretary of the Interior Manuel Lujan Jr.; staff member to the US House Committee on Interior and Insular Affairs (now the Natural Resources Committee) and the US House Committee on Science and Technology; technical staff member at Sandia National Laboratories |
| Patricia Lynn Scarlett (2001-2005) – Executive Director of Reason Public Policy Institute; Chair of the National Environmental Policy Institute’s “How Clean is Clean?” Working Group, and member of the Enterprise for Environment Task Force; Chair of California’s Inspection and Maintenance Review Committee charged with evaluating California’s vehicle Smog Check program |

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POSITION DESCRIPTION

# Chief Financial Officer, Department of Labor

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| **OVERVIEW** |
| Senate Committee | Health, Education, Labor and Pensions |
| Agency Mission | To foster and promote the welfare of job seekers, wage earners and retirees of the United States by improving their working conditions, advancing their opportunities for profitable employment and protecting benefits. |
| Position Overview | The Chief Financial Officer serves as the financial leader of the Department of Labor. The mission of the Office of the Chief Financial Officer (OCFO) is to foster effective stewardship of public funds, safeguard fiscal integrity through effective internal controls, and provide timely, accurate, and useful financial information to decision makers. The OCFO is responsible for oversight of all financial management activities in the Department. |
| Compensation | Level IV $160,300 (5 U.S.C. § 5314) |
| Position Reports to | Secretary of Labor |
| **RESPONSIBILITIES** |
| Management Scope | The Department of Labor budget for FY 2015 was $45.059 billion with $33.113 billion in mandatory spending and $11.945 billion in discretionary spending. In FY 2015 DOL had 16,583 FTE. In FY 2015 The Office of the Chief Financial Officer’s budget was $5.06M, and the 2017 budget request called for 17 FTE. |
| Primary Responsibilities | * Develop and manage tools and processes to provide critical financial and operational information to the Secretary, Deputy Secretary and department officials
* Assess organizational performance against both the annual budget and department’s long-term strategy
* Communicate regularly with the Secretary, Deputy Secretary, and department officials on performance, making actionable recommendations on both strategy and operations
* Participate regularly in assessment and development of department’s annual budget
* Support long-term budgetary planning and cost management, in alignment with department’s strategic plan
* Developing and maintaining integrated accounting and financial management systems
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Managing the financial execution of the agency budget and actual expenditures
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Experience at Controller or Chief Financial Officer level
* Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
* Certified Public Accountant preferred
 |
| Competencies | * Exhibits high level of integrity with strong focus on performance and results
* Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| Geoffrey Kenyon (2015 to Present) (acting) – Director of the Departmental Budget Center and Budget Officer for the Department of Labor; served with the House Appropriations Committee |
| James Taylor (2010 to 2014) – Deputy Inspector General for the Department of Homeland Security; Deputy Chief Financial Officer for the Department of Commerce |
| Douglas Webster (2008 to 2010) – Principal Finance Advisor to the Iraq Ministry of Transportation under the Coalition Provisional Authority |
| Samuel Mok (2002 – 2007) – Chief Financial Officer and Comptroller of the U.S. Department of the Treasury; Managing Member of Condor Consulting |

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POSITION DESCRIPTION

# Chief Financial Officer, Department of State

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| **OVERVIEW** |
| Senate Committee | Foreign Relations  |
| Agency Mission | To advance freedom for the benefit of the American people and the international community by helping to build and sustain a more democratic, secure and prosperous world composed of well-governed states that respond to the needs of their people, reduce widespread poverty and act responsibly within the international system. |
| Position Overview | The mission of the CFO is to advise the Secretary on all aspects of budget, grants, financial management and acquisition and to provide for the direction of these activities throughout the department. |
| Compensation | Level IV $160,300 (5 U.S.C. § 5315) |
| Position Reports to | Secretary and Deputy Secretary of State  |
| **RESPONSIBILITIES** |
| Management Scope | The department has about 13,000 Foreign Service Officers, more than 11,000 Civil Service Officers, and more than 45,000 locally employed Foreign Service staff at overseas posts. The combined State Department/USAID budget authority for FY 2015 was $47.773 billion. The CFO oversees the financial management of the entire department. |
| Primary Responsibilities | * Developing and maintaining integrated accounting and financial management systems
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Developing budgets that support all agency missions
* Managing the financial execution of the agency budget and actual expenditures
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Knowledge of federal budget formulation
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
 |
| Competencies | * Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| James L. Millette (2012-present) – Deputy Assistant Secretary for State Programs, Operations, and Budget, DOS; Senior Policy Advisor to the CFO, DOS; Director of Resources for the Foreign Buildings Program in the Bureau of Administration, DOS |
| Bradford Higgins (2006-2009) – Chief/Director of Planning to the U.S. Mission’s reconstruction management office in Baghdad; Chief Financial Officer to the Coalition Provisional Authority in Iraq; co-director of the joint civil-military strategic planning group in Iraq; Director of Strategic Performance and Assessment office for the US Mission in Iraq; Senior advisor to the US Ambassador in Iraq |
| Christopher Bancroft Burnham (2002-2005) – Chief Executive Officer of PIMCO’s Columbus Circle Investors; Vice-Chairman of PIMCO’s mutual fund group; Treasurer of Connecticut; investment banker with Credit Suisse First Boston and Advest Corporate Finance; elected to the Connecticut House of Representatives three times, and served as assistant minority leader; 23-year veteran of the United States Marine Corps Reserve |

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POSITION DESCRIPTION

# Assistant Secretary for Budget and Programs, Department of Transportation

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| **OVERVIEW** |
| Senate Committee | Commerce, Science, and Transportation  |
| Agency Mission | To ensure a fast, safe, efficient, accessible and convenient transportation system that meets our vital national interests and enhances the quality of life of the American people, today and into the future. |
| Position Overview | The Chief Financial Officer and Assistant Secretary for Budget and Programs at the U.S. Department of Transportation (USDOT) leads the teams responsible for providing sound budget development, disciplined performance review, rigorous financial management, and responsible credit administration for the department. This includes a range of functions, such as leading the department’s efforts to support formulation of the president’s budget; financial management; serving as the key fiscal advisor to the Secretary; and serving as the Vice Chair of the USDOT “Credit Council,” which sets the Department’s credit policies and oversees credit and financing programs, including recommending the approval or disapproval of financing support for specific projects. |
| Compensation | Level IV $160,300 (5 U.S.C. § 5315) |
| Position Reports to | Secretary and Deputy Secretary of Transportation |
| **RESPONSIBILITIES** |
| Management Scope | DOT's budget, performance, and financial management activities are overseen by the Office of the Chief Financial Officer and Assistant Secretary for Budget and Programs. In 2015 the Department of Transportation had $72.4 billion in budgetary resources and 54,324 FTE. |
| Primary Responsibilities | * Developing and maintaining integrated accounting and financial management systems
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Developing budgets that support all agency missions
* Managing the financial execution of the agency budget and actual expenditures
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
* Serving as the Vice Chair of the Department’s Credit Council.
* Overseeing the TIFIA program and the TIFIA Joint Program Office on behalf of the Secretary, including the evaluation of individual projects, and providing overall policy direction and program decisions for the TIFIA program
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Knowledge of federal budget formulation
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
 |
| Competencies | * Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| Shoshana M. Lew (2015-present) – Deputy Assistant Secretary for Policy at the US DOT; Senior Advisor in the Bureau of Ocean Energy Management supporting the reorganization of offshore oversight functions within the Department following the *Deepwater Horizon* oil spill; Senior Policy Director for Energy and Climate Change at the White House Domestic Policy Council; Policy Advisor to the Deputy Director of the Office of Management and Budget |
| Chris Bertram (2009-2014) – Senior professional staff member with the Senate Committee on Commerce, Science, and Transportation; Federal Aviation Administration’s Assistant Administrator for Financial Services and Chief Financial Officer; Staff Director for the House’s Subcommittee on Highways and Transit, and in various positions within the Office of Management and Budget |
| Phyllis Scheinberg (2005-2009) – Director of transportation issues in the Government Accountability Office; senior budget examiner in the Office of Management and Budget |
| Linda Morrison Combs (2004-2005) – Chief Financial Officer at the US Environmental Protection Agency |
| Donna Rae McLean (2001-2004) – Assistant Secretary of the Federal Aviation Administration; professional staff member of the House’s Transportation and Infrastructure Committee; worked within the Office of Management and Budget |

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POSITION DESCRIPTION

# Chief Financial Officer, Department of the Treasury

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| **OVERVIEW** |
| Senate Committee | Finance  |
| Agency Mission | To maintain a strong economy and create economic and job opportunities by promoting the conditions that enable economic growth and stability at home and abroad, strengthen national security by combating threats and protecting the integrity of the financial system, and manage the U.S. government's finances and resources effectively. |
| Position Overview | The Assistant Secretary for Management, Chief Financial Officer, and Chief Performance Officer (ASM/CFO/CPO) is the principal policy advisor to the Secretary and Deputy Secretary on the development and execution of the budget for the Department of the Treasury and the internal management of the Department and its bureaus. |
| Compensation | Level IV $160,300 (5 U.S.C. § 5315) |
| Position Reports to | Secretary and Deputy Secretary of the Treasury |
| **RESPONSIBILITIES** |
| Management Scope | The CFO oversees the financial management of the entire department. In FY 2015, the department had an enacted budget of $13.8 billion and in 2014 had 86,049 employees. The ASM/CFO/CPO also serves as the Director of the Office of Small and Disadvantaged Business Utilization. |
| Primary Responsibilities | * Developing and maintaining integrated accounting and financial management systems
* Overseeing the recruitment, selection and training of personnel to carry out agency financial management functions, as well as managing, training and providing policy guidance and oversight of these personnel and their activities
* Implementing agency asset management systems, including systems for cash management, credit management, debt collection, and property and inventory management and control
* Developing budgets that support all agency missions
* Managing the financial execution of the agency budget and actual expenditures
* Providing financial and performance reports to staff, overseers and stakeholders
* Tying the budget and performance to outcomes
* Taking the lead role in enterprise risk management
 |
| Strategic Goals and Priorities | [Insert relevant policy priorities of incoming administration] |
| **REQUIREMENTS AND COMPETENCIES** |
| Requirements | * Strong background in federal financial management
* Executive leadership experience
* Experience working in a large organization
* Risk management experience
* Knowledge of the department’s functions and policies
* Knowledge of federal budget formulation
* Familiarity with cyber-technology a plus
* Background in data analytics a plus
 |
| Competencies | * Ability to collaborate with the chief information officers, under/assistant secretaries for administration/management, as well as other CFOs and OMB via the CFO Council
* Knowledge of, and relationships with, or ability to develop relationships with, Congress
 |
| **PAST APPOINTEES** |
| Kody Kinsley (2016-present) – Served in several roles in the Treasury prior to his appointment; Policy Analyst with the White House Domestic Policy Council; Director of Policy and Program Support at the District of Columbia Department of Health and Human Services |
| Brodi Fontenot (2015-2016) – Assistant Secretary for Administration, Chief Human Capital officer, and Senior Sustainability Officer for the Department of Transportation; Deputy Assistant Secretary for Management and Budget at the DoT; staff member of the US Senate Budget Committee |
| Dan M. Tangherlini (2009-2013) – Washington, DC’s City Administrator and Deputy Mayor; Director of the District of Columbia Department of Transportation; Interim General Manager, Washington Metropolitan Area Transit Authority; CFO, Metropolitan Police Department; Worked in the Policy Office of the U.S. Secretary of Transportation; worked in a variety of capacities during six years of service with the Office of Management and Budget in the Executive Office of the President |

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