

POSITION TITLE:	Finance Director
DEPARTMENT:	Finance
FLSA STATUS:	Exempt
SALARY GRADE:	L
REPRESENTATION:	None

GENERAL POSITION SUMMARY:

Provides leadership, management, direction, planning and goal setting for the City's Finance Department to ensure delivery of quality municipal services. Responsible for financial and strategic planning for all financial issues facing the City of Sandy and Sandy Urban Renewal Agency. Conduct special projects as assigned by the City Manager. Supervise department personnel in the performance of their duties. Communicate with public and staff on financial matters and concerns. Serve as a member of the City's Management Team.

ESSENTIAL JOB FUNCTIONS:

- Responsible for development and implementation of the city's financial policies and city's strategic financial planning.
- In conjunction with the City Manager prepare and administer the City budget in accordance with Oregon municipal finance law. Ensure the timely completion and accuracy of the City's Biennial Budget and Annual Comprehensive Financial Report, including preparation of financial forecasts, issuance of debt, preparation of rate analysis for the City's utility system and financing of capital improvements.
- Coordinates with and assists department heads in the development of the City's comprehensive budget. Prepare and administer budgets based on staffing and resource requirements and program objectives and goals. Monitor budgets to ensure compliance with approved budget levels and standards.
- Ensure the city's budget, accounting systems and reports comply with appropriate legal and regulatory requirements of the Generally Accepted Accounting Principles for municipal agencies.
- Coordinates and performs all accounting and fiscal management requirements on federal and state grants.
- Ensures integrity and accuracy of the general ledger and subsidiary ledgers while ensuring internal control within all city functions.
- Works to ensure that the development and implementation of accounting and internal control policies and procedures; ensure adequate security for all financial assets.
- Responsible for all monthly journal entries including accounts receivable, accounts payable, and general ledger; Completes monthly bank reconciliation of various City accounts with multiple financial institutions.
- Analyzes investment opportunities, monitors investment performance and oversees the City's investment portfolio

- Provides supervision and manage Accounting, Utility Billing, and Municipal Court staff, including prioritizing and developing work plans, to ensure City goals and objectives are met. Schedule, assign and evaluate performance of finance staff members.
- Interview and effectively recommend hiring and termination actions. Provide opportunities for developmental training and performance coaching to employees. Conduct performance evaluations and provide training and development for staff.
- Handles difficult problems that arise from the general public and answers questions concerning tax rates and billings.
- Coordinates annual audit with auditing firm; provides all required documentation to firm; reviews and approves all financial statements; submits annual comprehensive financial report (ACFR) to appropriate agencies.
- Respond to requests for information from the City Manager, Deputy City Manager, Council, Boards, Commissions, staff and other outside agencies including identifying information needed and report format. Review reports prepared by staff, including determining completeness and accuracy.
- Oversight of the city's risk management function including coordination with city insurance agent, claim processing, and program policies and procedures.
- Coordinates and administers the city's insurance coverage for liability, loss recovery, property and asset damage, and other forms of loss prevention.
- Maintains all financial records of the City's contracts.
- Attends Council and other city meetings and makes public presentations as required.
- Ensure all city purchases comply with adopted contracting regulations and procedures.
- Performs special projects and provides special information as directed by City Manager. Performs other duties as required.
- Establishes and maintains positive working relations with coworkers, citizens, the public, and other agency staff.

JOB SPECIFICATIONS:

Mandatory Requirements:

- Bachelor's in Accounting, Finance, Business Administration or related field.
- Five years progressively responsible related experience including public sector accounting with two years in a supervisory or leadership role.
- Strong written and verbal communications skills.
- Quantitative analysis skills, including cost/benefit analysis and statistical analysis.
- Extensive experience with Microsoft Excel or similar spreadsheets, as well Microsoft Office applications.
- High standards of personal integrity, professionalism, and attention to detail.
- Formal training in fund accounting preferred.

Preferred Requirements:

- Possession of Certified Management Accountant designation
- Previous Oregon municipal experience.
- Completion of Master's degree in Public Administration, Finance, or related field.
- Working experience with Tyler Technologies Incode VX.

Necessary Knowledge, Skills and Abilities:

- Considerable knowledge of Generally Accepted Accounting Principles (GGAP), Government Accounting Standards, and Oregon Revised Statutes including concept, principals, and practices of municipal finance administration as they apply to budgeting, investments, and financial reporting.
- Considerable knowledge of applicable federal, state, and local laws governing revenues, expenditures, public contracting, budget law, urban renewal and other economic stimulus programs.
- Intermediate knowledge of financial information systems and spreadsheet software.
- Considerable knowledge of methods and practices of financial recordkeeping; considerable knowledge of financial terminology.
- Quantitative analysis skills, including cost/benefit analysis and statistical analysis.
- Ability to implement management theories, principals, and practices.
- Knowledge and skills in goal setting, program development and evaluation, and evaluation, and supervision of staff directly or through subordinate levels of supervision.
- The ability to effectively communicate with coworkers, management, elected officials, and the general public.
- Strong interpersonal skills, political astuteness, and awareness of and navigation around controversial and sensitive issues.

Special Requirements/Licenses:

- Possession of or required to obtain a valid driver's license within thirty (30) days of hire. Must have a safe driving record.
- Must be able to pass the department's security clearance standards, including Reference check and Criminal History check.

SUPERVISION RECEIVED:

Works under the direction of the City Manager.

SUPERVISORY RESPONSIBILITIES:

Supervises department staff which includes oversight and final authority for assigning, reviewing and evaluating work performance.

PHYSICAL DEMANDS:

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential job functions.

- Frequently required to sit and talk or listen.
- Required to walk up and down stairs or sit long periods of time and must have the hearing and speaking ability to conduct formal presentations.
- Over 50% of the work period involves the ability to reach with hands and arms, use hands to finger, handle, operate objects, tools, or controls and must have sufficient hand-eye coordination to operate common business equipment.
- Occasionally lift and/or move up to 25 pounds. Reaching, bending, stretching and handling objects as required to file.
- Specific vision abilities required for this position include close vision and ability to adjust focus.

TOOLS AND EQUIPMENT USED:

General office computer/equipment including, but not limited to, keyboard, computer software, 10-key calculator, document scanning program, copier, fax machine, calculator, and telephone.

WORK ENVIRONMENT:

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

- Work is performed mostly in an office setting in well-lighted, temperature-controlled office environment.
- The noise level in the work environment is usually quiet with frequent interruptions. Customer (internal and external) contact is high. These interactions may reach moderate noise levels.

This description covers the most significant essential and auxiliary duties performed but does not include other occasional work which may be similar, related or logical assignment to the position.

Tyler Deems
City Manager

Adopted: Unknown

Revised: 04/14/2016, 12/18/2017, 02/13/2018, 12/10/2018, 11/06/2019, 8/2020, 10/2023



JOB DESCRIPTION

This job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

Employee

Date