CITY OF TUALATIN
Classification Description

Job Title: Assistant Finance Director
Department: Finance
Reports To: Finance Director
FLSA Status: Exempt

SUMMARY: Under general direction, the Assistant Finance Director assists in the general operations of the finance, budget and accounting functions; supervises functional staff selected by the Finance Director and acts as Finance Director in the Finance Director’s absence.

ESSENTIAL DUTIES AND RESPONSIBILITIES include the following. Other duties may be assigned.

Manages finance operations: develops and implements division work plans, procedures and reports; evaluates program performance and effectiveness, and initiates program improvement actions.

Supervises staff to ensure City goals and objectives are met: schedules, assigns and reviews work; makes hiring decisions; conducts performance reviews; and provides for training and development.

Assists with the compilation of the citywide budget: develops and communicates administrative procedures; coordinates distribution of reports and forms; reviews and analyzes budget proposals; and makes recommendations to the Finance Director on departmental requests.

Manages and coordinates the annual audit process. Works with auditors in the preparation of the comprehensive annual financial report (CAFR).

Maintains and ensures the accuracy of journals and ledgers. Collects, compiles, tabulates and analyzes data and accounting procedures. Coordinates and updates financial plans and reports, verifying them for completeness and accuracy. Develops work plans, timelines and resource allocations for assigned projects. Monitors to ensure objectives are met.

Responds to inquiries of a research or technical nature. Prepares copies of documents upon request and distributes them as directed.

Represents the Finance Department and/or City to the public, in legal or administrative proceedings, to other organizations or entities upon request.

Makes presentations and provides comment and testimony upon request.

Performs other duties of a similar nature or level.

SUPERVISORY RESPONSIBILITIES: Supervises an Accountant, Accounting Technicians performing in the program areas including but not limited to, accounts receivable, accounts payable, payroll, utility billing, collections, and purchasing and an Office Assistant who operates the City’s main phone system, serves as City Receptionist and processes payments and issues passports. Carries out supervisory responsibilities in accordance with the organization's policies and applicable laws. Responsibilities
include interviewing, hiring, and training employees; planning, assigning, and directing work; appraising performance; rewarding and disciplining employees; addressing complaints and resolving problems.

COMPETENCIES: To perform the job successfully, an individual should demonstrate the following competencies:

Adaptability - Adapts to changes in the work environment; Manages competing demands; Able to deal with frequent change or unexpected events; Changes approach or method to best fit the situation.

Analytical - Synthesizes complex or diverse information; Collects and researches data; Uses intuition and experience to complement data; Designs work flows and procedures.

Attendance & Punctuality – Consistently at work and on time; Arrives at meetings and appointments on time.

Change Management - Develops workable implementation plans; Communicates change effectively; Builds commitment and overcomes resistance; Prepares and supports those affected by change; Monitors transition and evaluates results.

Cost Consciousness - Works within the approved budget; Conserves organizational resources; Develops and implements cost saving measures.

Crisis Management – Able to maintain calm in non-standard situations; Recognizes what is most suitable in a given situation; Exhibits decisiveness and responsibility; Knows when to consult and involve others.

Customer Service - Manages difficult or emotional customer situations; Understands and applies the principles of quality customer service; Responds promptly to customer needs and to requests for service and assistance; Solicits customer feedback to improve service.

Delegation - Delegates work assignments; Matches the responsibility to the person; Gives authority to work independently; Sets expectations and monitors delegated activities; Provides recognition for results.

Dependability - Follows instructions and responds to management direction; Takes responsibility for own actions; Keeps commitments; Completes tasks on time or notifies appropriate person with an alternate plan.

Diversity - Shows respect and sensitivity for cultural differences; Promotes and supports a harassment-free environment.

Ethics - Treats people with respect; Inspires the trust of others; Works ethically and with integrity; Upholds organizational values.

Initiative - Volunteers readily; Undertakes self-development activities; Seeks increased responsibilities; Takes independent actions and calculated risks; Looks for and takes advantage of opportunities; Asks for help when needed.

Innovation - Displays original thinking and creativity; Meets challenges with resourcefulness; Generates suggestions for improving work; Develops innovative approaches and ideas; Presents ideas and information in a manner that gets others' attention.
**Interpersonal Skills** – Focuses on cooperatively resolving conflict; Maintains confidentiality; Actively listens to others without interrupting; Conveys a positive image of the City and its services; Keeps emotions under control; Remains open to others; Ideas and tries new things.

**Judgment** - Displays willingness to make decisions; Exhibits sound and accurate judgment; Supports and explains reasoning for decisions; Includes appropriate people in decision-making process; Makes timely decisions.

**Leadership** - Exhibits confidence in self and others; Inspires and motivates others to perform well; Effectively influences actions and opinions of others; Accepts feedback from others; Gives appropriate recognition to others

**Managing People** - Includes staff in planning, decision making, facilitating and process improvement; Takes responsibility for subordinates' activities; Makes self available to staff; Provides regular performance feedback; Develops subordinates' skills and encourages growth; Solicits and applies customer feedback (internal & external); Fosters quality focus in others; Improves processes and services; Continually works to improve supervisory skills.

**Motivation** - Sets and achieves challenging goals; Demonstrates persistence and overcomes obstacles; Measures self against standard of excellence; Takes calculated risks to accomplish goals.

**Oral Communication** - Speaks clearly and persuasively; Listens and gets clarification; Responds well to questions; Participates in meetings; Demonstrates group presentation skills.

**Organizational Support** - Follows policies and procedures; Completes administrative tasks correctly and on time; Supports organization's goals and values; Benefits organization through outside activities; Supports affirmative action and respects diversity.

**Planning & Organizing** – Prioritizes and plans work activities; Uses time resources efficiently; Plans for additional resources; Sets goals and objectives; Organizes or schedules other people and their tasks; Develops realistic action plans.

**Problem Solving** - Identifies and resolves problems in a timely manner; Gathers and analyzes information skillfully; Develops alternative solutions; Uses reason even when dealing with emotional topics; Works well in group problem solving situations.

**Professionalism** - Approaches others in a tactful manner; Reacts well under pressure; Treats others with respect and consideration regardless of status or position; Inspires respect and trust; Accepts responsibility for own actions; Follows through on commitments.

**Project Management** – Develops project plans; Coordinates projects; Communicates changes and progress; Completes projects on time and budget; Manages project activities.

**Quality Management** - Looks for ways to improve and promote quality; Demonstrates accuracy and thoroughness; Applies feedback to improve performance; Monitors own work to ensure quality.

**Safety and Security** - Observes, and ensures others observe, safety and security procedures; Determines appropriate action beyond guidelines; Reports potentially unsafe conditions; Uses, and ensures other staff use, equipment and materials properly.
**Strategic Thinking** - Develops strategies to achieve organizational goals; Understands organization’s strengths and weaknesses; Identifies external threats and opportunities; Adapts strategy to changing conditions.

**Teamwork** – Balances team and individual responsibilities; Exhibits objectivity and openness to others’ views; Gives and welcomes feedback; Contributes to building a positive team spirit; Puts success of team above own interests; Able to build morale and group commitments to goals and objectives; Supports everyone’s efforts to succeed.

**Technical Skills** - Assesses own strengths and weaknesses; Pursues training and development opportunities; Strives to continuously build knowledge and skills; Shares expertise with others.

**Written Communication** - Writes clearly and informatively; Edits work for spelling and grammar; Varies writing style to meet needs; Presents numerical data effectively; Able to read and interpret written information.

**QUALIFICATIONS:** To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. The requirements listed below are representative of the knowledge, skill, and/or ability required. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

**Knowledge:** Advanced knowledge of the principles and practices of modernized governmental accounting and of the laws regulating public finance and fiscal operations. Considerable knowledge of the principles and practices of municipal budgeting. Knowledge of investment management and economic theory.

**Mathematical Skills & Abilities:** Ability to work with mathematical concepts such as probability and statistical inference quickly and accurately. Ability to apply concepts such as fractions, percentages, ratios, and proportions to practical situations. Ability to analyze accounting and auditing problems and to develop effective controls. Ability to maintain moderately complex financial records and prepare clear and concise reports.

**Language Skills:** Ability to read, analyze, and interpret general business periodicals, professional journals, technical procedures, or governmental regulations. Ability to write reports, business correspondence, and procedure manuals. Ability to effectively present information and respond to questions from groups of managers, clients, customers, and the general public.

**Certificates, Licenses, Registrations:** Possession of, or the ability to secure possession of, a valid Oregon driver's license.

**EDUCATION and/or EXPERIENCE**
Bachelor's degree in Accounting, Business Administration or a closely related field, and four or more years of progressively responsible experience performing advanced accounting duties, preferably for a public agency. Recent and extensive experience with a mainframe based financial system. Two years of supervisory experience, or an equivalent combination of experience and education sufficient to successfully perform the essential duties of the job as those listed above.

**PHYSICAL DEMANDS and WORK ENVIRONMENT:** The physical demands and work environment 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 functions.
While performing the duties of this job, the employee is regularly required to sit; use hands to finger, handle, or feel; and talk or hear. The employee frequently is required to reach with hands and arms. The employee is occasionally required to stand; walk; and stoop, kneel, crouch, or crawl. The employee must regularly lift and/or move up to 10 pounds, infrequently lift and/or move up to 25 pounds. Specific vision abilities required by this job include close vision, color vision, depth perception, and ability to adjust focus.

Duties of this position will be performed in an indoor environment with a moderate noise level. While performing the duties of this position an employee may be subject to frequent interruptions and deal with upset individuals.