

FINANCE MANAGER

DEFINITION

Under administrative direction, plans, organizes, manages, and reviews the work of staff performing professional and technical support duties related to all programs and activities of an assigned Finance Unit of the Santa Clara County Housing Author (Agency) including accounting, financial management and reporting, audits, and budget management; ensures all financial and budget operations, procedures, and internal controls are in compliance with Agency policies, Generally Accepted Accounting Principles (GAAP), Financial Accounting Standards Board (FASB) and Governmental Accounting Standards Board (GASB) standards, and Department of Housing and Urban Development (HUD) guidelines; coordinates assigned activities with other Agency departments, outside agencies, and the public; provides highly responsible and complex professional assistance to the Controller in areas of expertise; performs related work as required.

SUPERVISION RECEIVED AND EXERCISED

Receives administrative direction from the Controller. Exercises direct and general supervision over assigned accounting and finance staff.

CLASS CHARACTERISTICS

This is a mid-management classification that manages assigned finance programs and activities in the Finance Department. The incumbent organizes and oversees day-to-day finance programs. Responsibilities include performing diverse, specialized, and complex work involving significant accountability and decision-making responsibility. The incumbent is responsible for providing professional-level support to the Controller in a variety of areas. Successful performance of the work requires an extensive professional background as well as skill in coordinating divisional work with that of other departments, divisions, and outside agencies. This class is distinguished from the Controller in that the latter has overall responsibility for all financial services programs and for developing, implementing, and interpreting public policy.

EXAMPLES OF TYPICAL JOB FUNCTIONS (Illustrative Only)

Management reserves the rights to add, modify, change, or rescind the work assignments of different positions and to make reasonable accommodations so that qualified employees can perform the essential functions of the job.

- Plans, manages, and participates in the design, development, and administration of finance programs, including accounting, financial management and reporting, audits, and budget management.
- Participates in the development and implementation of goals, objectives, policies, and priorities for the Unit; recommends within policy, appropriate service and staffing levels; recommends and administers financial policies and procedures.
- Develops and standardizes procedures and methods to improve and continuously monitor the efficiency and effectiveness of assigned programs, service delivery methods, and procedures; assesses and monitors workload, administrative, and support systems, and internal reporting relationships; identifies opportunities for improvement and recommends to the Controller.
- Participates in the selection of, trains, motivates, and evaluates assigned finance personnel; works with employees to correct deficiencies; recommends and implements discipline as needed.
- Manages, plans, directs, and coordinates the preparation and monitoring of the Agency and affiliate entity budgets; maintains effective communication with other departments and the Executive management team, recommends application of appropriate budgetary procedures and principles, reviews various budget reports and data for accuracy and consistency, and makes recommendations for adjustments.
- Oversees and provides guidance on all financial aspects of the pre-development, rehabilitation, and construction process and activities for the Agency and affiliate entities including approving financial transactions, setting up financial relationship structures and accounts, and overseeing audits and tax return processes.
- Assists and supports the Controller and Chief Financial Officer/Director of Finance in consistently applying cost effective and appropriate accounting and reporting procedures and internal controls; researches, interprets, and applies current GAAP, FASB and GASB standards, and HUD regulations.
- Manages and facilitates the Agency and affiliate audits and prepares and reviews financial reports and annual financial statements.

- Manages and performs analytical review of all financial reports including Agency wide monthly and annual variance, tax credit properties, housing program, HUD, and investment, budget, and cash reports, for accuracy, validity, reliability, alignment with program objectives, and in compliance with policies, standards, and regulations.
- Prepares reports and pro-forma projections; reviews housing program leasing and financial data; prepares reports on suggestive action plans based on various partnership and other financial agreements; analyzes a variety of complex scenarios that relate to property and program financing agreements.
- Manages general ledger and chart of account structures and activity.
- Conducts special research assignments, gathers and analyzes data, and prepares reports for consideration by management.
- Works directly with staff from other sections to resolve technical accounting and reporting issues and problems.
- Establishes and maintains contact and working relationships with all Agency departments, affiliate entities, local, state, and federal agencies for acquisition of necessary information, and/or for the implementation of cooperative programs and activities.
- Provides assistance to the Executive management team and provides staff support to assigned boards and commissions; attends and participates in professional group meetings and participates on a variety of boards, commissions, and committees; stays abreast of new trends and innovations in the field of finance and prepares and presents staff reports and other necessary correspondence.
- Responds to difficult and sensitive public inquiries and complaints and assists with resolutions and alternative recommendations.
- Performs other duties as assigned.

QUALIFICATIONS

Education and Experience:

A bachelor's degree from an accredited four-year college or university with major coursework in accounting, finance, business administration, or a closely related field; and seven (7) years of increasingly responsible professional accounting experience, including three (3) years of supervisory experience. Master's degree preferred.

Licenses and Certifications:

Certified Public Accountant licensure preferred.

Knowledge of:

- Administrative principles and practices, including goal setting, program development, implementation, and evaluation.
- Principles and practices of employee supervision, including work planning, assignment, review and evaluation, discipline, and the training of staff in work procedures.
- Organization and management practices as applied to the analysis and evaluation of projects, programs, policies, procedures, and operational needs.
- Principles and practices of comprehensive financial program development, implementation, and management.
- Accounting, auditing, financial analysis, and budget principles and procedures and their application to a variety of accounting transactions and problems.
- Financial statements and elements (such as, but not limited to assets, liabilities, equity, income, and expenses).
- Applicable federal, state, and local laws and Agency resolutions, policies, and procedures relevant to assigned area of responsibility.
- Methods and techniques for the development of presentations, contract negotiations, business correspondence, and information distribution; research and reporting methods, techniques, and procedures.
- Modern office practices, methods, and computer equipment and applications related to the work.
- English usage, spelling, vocabulary, grammar, and punctuation.
- Techniques for effectively representing the Agency in contacts with governmental agencies, community groups, and various business, professional, educational, regulatory, and legislative organizations.
- Techniques for providing a high level of customer service by effectively dealing with the public, vendors, contractors, and Agency staff.

Ability to:

- Assist in developing and implementing goals, objectives, policies, procedures, work standards, and internal controls for the department and assigned program areas.
- Plan, organize, assign, review, and evaluate the work of staff; train staff in work procedures.
- Effectively administer a variety of financial programs and administrative activities.
- Interpret, apply, and explain federal, state, and local laws and regulations, and policies, procedures, and practices of financial administration.
- Evaluate and develop improvements in operations, procedures, policies, or methods.
- Prepare clear and concise reports, correspondence, policies, procedures, and other written materials.
- Research, analyze, and evaluate new service delivery methods, procedures, and techniques.
- Analyze, interpret, summarize, and present technical information and data in an effective manner.
- Conduct complex research projects, evaluate alternatives, make sound recommendations, and prepare effective technical staff reports.
- Effectively represent the department and the Agency in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Establish and maintain a variety of filing, record-keeping, and tracking systems.
- Organize and prioritize a variety of projects and multiple tasks in an effective and timely manner; organize own work, set priorities, and meet critical time deadlines.
- Operate modern office equipment including computer equipment and specialized software applications programs.
- Use English effectively to communicate in person, over the telephone, and in writing.
- Use tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establish, maintain, and foster positive and effective working relationships with those contacted in the course of work.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment, including a computer; to operate a motor vehicle and to visit various Agency and meeting sites; vision to read printed materials and a computer screen; and hearing and speech to communicate in person, before groups, and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 25 pounds.

ENVIRONMENTAL ELEMENTS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances, duties of this class may be performed in an environment with exposure to various odors/fragrances. Employees may interact with upset staff and/or public and private representatives in interpreting and enforcing departmental policies and procedures.