

Position Description

Position Title:	Strategic Advisor – Finance and Analysis	Department:	Executive
Reports to:	Senior Strategic Advisor	Employment Status:	Full-Time
FLSA Status:	Exempt	Date Created:	June 2023
Representation Status:	Unrepresented	Date Revised:	N/A

Summary

The primary purpose of this position is to serve as the lead resource developing financial and programmatic analyses for the Santa Clara County Housing Authority and its affiliates. This position will work closely with the Executive Team and play a critical role in helping shape the Agency's short- and long-term business strategies and execution. The incumbent will collaborate with others at all levels of the organization and with external stakeholders in the consideration of significant goals, concepts, initiatives, and other activities that profoundly affect the Agency, its employees, and the people that it serves. This position provides highly responsible and complex professional support to the Executive Leadership team in the areas of finance, assisted housing program management, and affordable housing development; and performs related work as required.

The essential duties and responsibilities listed below support the Santa Clara County Housing Authority's ("SCCHA") mission, strategic goals, and objectives.

Essential Duties and Responsibilities

The position duties and responsibilities listed below describe the general nature and scope of work. Other responsibilities, duties, and skills may be required and assigned, as needed.

- Oversees the financial support for multiple, operational business units through thorough financial analysis and forecasts, driving cross-functional support for business plans and resource allocation, and setting targets, tracking and ensuring performance to plans.
- Serves as an advisor and technical expert to the Senior Strategic Advisor and Executive Team to formulate strategic approaches in order to maximize funding allocation, create alternative funding sources, design new programs, and improve current program effectiveness and efficiency.
- Monitors, analyzes and evaluates all facets of Agency assisted housing programs, including the Housing Choice Voucher program; in conjunction with department leaders, monitors and evaluates the efficiency and effectiveness of service delivery methods and policies for the HCV program, including but not limited to, Housing Assistance Payments, voucher utilization, leasing projections, payment standards, subsidy standards, Two-Year/Three-Year Tools and overall financial performance; identifies opportunities for improvement, develops recommendations and implements programs and policies to meet identified needs; directs the implementation of change and develops guidance and/or training.
- Develops financial modeling, financial statement analysis, budgeting, decision- modeling, reporting and ad-hoc analysis to support strategic initiatives; assists in the continued development of budgeting, financial forecasting, operating plan and modeling tools; develops and maintains consistent tracking devices to measure performance.
- Analyzes consolidated reporting at all levels of the organization on actuals, forecasts and prior fiscal year; conducts thorough research and analysis of programmatic and financial reports to ensure data accuracy; develops, monitors and analyzes key financial and non-financial performance indicators; performs regular financial, social service, and capital needs analyses to determine operational performance of individual properties and the portfolio as a whole.

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- Leads and/or participates in the analysis, application and submission of grants and funding applications; monitors and analyzes potential funding sources; works collaboratively with other departments to complete grant or funding applications; develops reporting mechanism for required grants or funding reports.
- Supports the administration of the Agency's portfolio of residential properties including physical, financial and compliance performance of stabilized assets, asset planning, asset repositioning, property management and financing strategies, financial performance review and analysis, and the capital needs assessment program to ensure that Agency properties are fiscally sound and viable investments, are physically maintained, and are in compliance with all regulatory requirements; supports the effort of originating and negotiation of debt financing; assists with the coordination of post-acquisition activities and integration of asset into the Agency's ownership portfolio; collaborates with various Agency departments to develop strategies related to property conversion, operation, management, and disposition.
- Analyzes operational efficiencies and identifies opportunities for improved performance to maximize total return for the portfolio, models full life cycle financial analysis for several types of assets from acquisition through disposition.
- Conducts special studies of extremely controversial or sensitive problem areas, which include changes in program operations and staffing necessary to improve efficiency and effectiveness, prepares reports of finding, conducts briefings with the Executive Director and Executive Leadership team providing recommendations which often serve as the basis for new program initiatives.
- Supports the utilization and analysis of data to create opportunities and programs that support positive outcomes for residents and clients; designs and leads the implementation of infrastructure to sustain ongoing analysis and innovative program design.
- Evaluates, recommends, and develops improvements in operations, procedures, policies, or methods.
- Conducts research projects, evaluates alternatives, makes sound recommendations, and prepares effective reports including staff and Board reports.
- Selects, trains, motivates, coaches, and evaluates personnel; provides or coordinates staff training; work with employees to correct deficiencies; executes discipline and termination procedures.
- Coordinates activities with other Agency departments, investors, community partners, residents, regulatory agencies and related groups; attends public meetings and presents information on Agency programs.
- Interprets, applies, and explains federal, state, and local laws and regulations, and policies, procedures, and practices of assigned position.
- Prepares and presents clear and concise reports, correspondence, policies, procedures, and other written materials. Researches, analyzes, and evaluates new service delivery methods, procedures, and techniques to internal and external stakeholders.
- Effectively represents the Department and the Agency in meetings with governmental agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.
- Establishes and maintains a variety of filing, record-keeping, and tracking systems.
- Organizes and prioritizes a variety of projects and multiple tasks in an effective and timely manner; organizes own work, sets priorities for self and others, and meets critical timelines/deadlines.

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- Uses tact, initiative, prudence, and independent judgment within general policy, procedural, and legal guidelines.
- Establishes, maintains, and fosters positive and effective working relationships with those contacted in the course of work.

QUALIFICATIONS

Education and/or Experience

Any equivalent combination of education and experience likely to provide the required core competencies may be considered. A typical combination that is qualifying may include:

A bachelor's degree from an accredited four-year college or university with major coursework in accounting, finance, business administration, or related field and a minimum of five (5) years of experience in financial analysis and reporting, including a minimum of three (3) years in a supervisory capacity. A master's degree is preferred.

Possession of a valid California Driver's License and satisfactory driving record at the time of appointment is required as a condition of initial and continued employment only if the operation of a vehicle, rather than the employee's ability to get to/from various work locations in a timely manner, is necessary to perform the essential functions of the position.

Core Competencies

This position requires the incumbent to exhibit the following behaviors, knowledge, skills and abilities:

Advancing Inclusivity and Leveraging Diversity: Works to create a culture of inclusivity where individuals of diverse cultures, demographics, interpersonal styles, abilities, motivations or backgrounds are and feel valued for their unique perspective and talent; inspires and makes the most effective use of the capabilities, insights and ideas of all individuals.

Commitment: Sets high standards of performance; pursues aggressive goals and works hard/smart to achieve them; strives for results and success; conveys a sense of urgency and brings issues to closure; persists despite obstacles and opposition.

Customer/Client Service: Meets/exceeds the expectations and requirements of internal and external customers and clients; identifies, understands, monitors, and measures the needs of both internal and external customers and clients; talks and acts with customers and clients in mind. Values and recognizes work colleagues as customers.

Effective Communication: Ensures important information is clear, concise and organized to be passed to those who need to know verbally or in writing. Demonstrates attention to, and conveys understanding of, the comments and questions of others. Actively listens and understands the audience to adapt messages appropriately. Applies knowledge of methods and techniques for the development of effective presentations, business correspondence, and information distribution based on audience needs.

Initiative: Proactively seeks solutions to resolve unexpected challenges. Actively assists others without formal/informal direction. Possesses the capacity to learn and actively seeks developmental feedback. Applies feedback for continued growth by mastering concepts needed to perform work.



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Integrity: Exhibits honesty with oneself, coworkers, and customers. Stands up for what is fair, honest, ethical, and morally right even, in the face of opposition.

Job Knowledge and Skill: Exhibits requisite knowledge, skills, and abilities to perform the position effectively including short and long-term planning, development and administration of strategic initiatives, housing programs, policies, procedures, and services, and financial systems and programs administered by the Agency (including expert-level knowledge of the Housing Choice Voucher program and affordable housing development) and public policies, Agency functions and activities. Uses appropriate judgment & decision making in accordance with level of responsibility; and researches and reports on various topics using a broad range of methods, techniques, and procedures.

Judgement & Decision Making: Exhibits sound reasoning and critical thinking skills by making decisions in line with established Agency expectations. Make decisions in compliance with the law and Agency policies and subordinate personal interests and views while representing the Agency acting in an official capacity.

Responsiveness and Accountability: Demonstrates a high level of conscientiousness; holds oneself personally responsible for one's own work; does fair share of work.

Strategic Capability and Leadership: Serves as a role model to others by keeping the agency's mission, vision and values at the forefront of decision making and action; applies administrative and leadership principles and practices to work, including strategic goal setting and program and policy development, implementation, and evaluation; supports a culture of professional employee development through mentoring and coaching; provides direction by effectively supporting and/or setting course of action for department, direct reports, and team members.

Supervising and Managing Team Success: Operates effectively within the agency and monitors, supervises and manages, people, resources and risk. Has knowledge of and ability to apply principles and practices of workforce management and employee supervision in the analysis and evaluation of projects, programs, policies, procedures, and operational needs; monitors people and program performance by providing regular feedback and reinforcement to direct reports and team members.

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; supports everyone's efforts to succeed; establishes, maintains, and fosters positive and effective working relationships with those contacted in the course of work.

Technical Skills: Exhibits requisite knowledge, skills and ability to perform duties using computers and peripheral equipment, and software skills (e.g. MS Word, Excel, PowerPoint, and Outlook). Must have the ability to learn computer software programs as required by assigned tasks.

Work Environment/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.



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Read and Acknowledged

Employee Signature

Date

Employee Name [printed]