

### Position Description

<b>Position Title:</b>	Chief Financial Officer	<b>Department:</b>	Finance
<b>Reports to:</b>	Deputy Executive Director	<b>Employment Status:</b>	Full-Time
<b>FLSA Status:</b>	Exempt	<b>Date Created:</b>	July 2017
<b>Representation Status:</b>	Unrepresented	<b>Date Revised:</b>	June 2024

### Summary

The primary purpose of this position is to execute the long-term financial and economic vision for the Agency under the direction of the Executive Director and the Board of Commissioners. The Chief Financial Officer (CFO) oversees all programs and activities of the Finance Department including planning, directing, auditing, reporting on all financial plans, policies, and affairs of the Santa Clara County Housing Authority (SCCHA) and affiliated organizations, and provides highly complex, strategic, and executive management support to the Executive Director and Deputy Executive Director. The CFO has overall responsibility for all accounting, budgeting, financial management/analysis, auditing, financial reporting, ensuring all functions are performed in accordance with the applicable federal, state, and local laws and regulations. This position serves as a trusted advisor and steward of public funds and oversees the complex and varied financial programs, projects, and activities of the Agency requiring advanced knowledge of public policy, various departmental functions and activities, and the ability to develop, oversee, and implement specialized projects and programs through subordinate senior management staff.

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.*

- Provides leadership, strategic support and expert financial planning and analysis to ensure the integrity of the Agency's financial statements and accurate assessment of the Agency's financial position, enabling the executive management team to select service options and models that meet its mission, purpose, and objectives while maintaining the Agency's role as an excellent steward of public funds.
- Works to implement the strategic vision, including fostering and cultivating stakeholder relationships at the city, regional, state, and national levels. Assists in identifying new funding opportunities, drafting prospective programmatic budgets, and determining the cost-effectiveness of potential service delivery.
- Directs all Finance Department services and activities, including accounting operations (accounts payable, accounts receivable, general ledger maintenance, payroll) financial

### **Position Description**

planning and analysis, budget preparation, financial monitoring, and reporting. Recommends and implements policies, procedures, and internal controls to ensure efficient and effective financial operations.

- Develops the department's strategic plan and manages the creation and implementation of goals, objectives, policies, procedures, and work standards. Assigns department staff as needed to optimize the efficiency and effectiveness of the department's overall performance.
- Oversees the Finance Department through subordinate senior management staff including assigning, planning, and reviewing work, evaluating work performance and completing performance evaluations, coordinating activities, maintaining standards, allocating personnel, selecting new employees, training, providing technical advice, acting on employee problems, and recommending and implementing discipline and merit raises. Ensures supervisors under his/her purview have the tools necessary to manage daily operations.
- Oversees and maintains a system of accounts, records, and reports, including cash flow requirements and analyses, that reflects the financial status of the Federal and State programs managed by SCCHA and of properties that SCCHA owns, operates, and manages; recommends changes to SCCHA financial policies and procedures as needed.
- Develops and ensures that accounting and financial policies, procedures and internal controls are maintained in accordance with Generally Accepted Accounting Principles (GAAP), Federal, State and HUD regulations.
- Prepares financial reports and other information for the Executive Director or Deputy Executive Director. Prepares monthly financial reporting to all SCCHA entities and affiliates; submits reports to Executive Director for Board reporting. Prepares annual operating budgets for the Executive Director, senior staff and Board of Commissioners. Prepares and submits monthly/quarterly reporting to developers and investors.
- Supports real estate development and acquisition strategies. Understands and navigates partnership structures, mortgage documents, development agreements, partnership agreements, and purchase and sale agreements. Conducts financial due diligence measures by working with various stakeholders such as the Real Estate department, third parties, investors, lenders, and partners.
- Conducts fiscal analysis of assets in portfolio to maximize financial performance and works closely with other Agency departments on annual revenue analysis, capital accounts analysis, tax credit exit strategies, and refinance opportunities.
- Interprets, applies, and explains federal, state, and local laws and regulations, and policies, procedures, and practices of assigned position.
- Evaluates, recommends, and develops improvements in operations, procedures, policies, or methods.
- Effectively represents the Department and the Agency in meetings with governmental

### **Position Description**

agencies, community groups, and various businesses, professional, and regulatory organizations, and in meetings with individuals.

- 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.
- 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 in Accounting, Finance, Business Administration or related field from an accredited four-year college or university and a minimum of ten (10) years of extensive experience in budgeting, financial analysis and reporting, purchasing, and financial accounting, with a minimum seven (7) years in a senior managerial capacity, and three (3) years in an executive level position. Must possess a minimum of two (2) years of experience in HUD public housing and Section 8 housing accounting. Master's degree 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.

### **Position Description**

*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.

*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 political, economic, and strategic acumen to support agency goal and mission alignment and attainment; knowledge of HUD regulations and public housing administration; pertinent Federal, State, and local laws, codes and regulations; the local and regional housing market; skills to read, interpret, and analyze HUD regulations, PHA policies, and guidelines to make sound decisions; knowledge of 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, procedures, goals, objectives, operational entities, requirements, and activities as they apply to the assigned position. 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.

### **Position Description**

**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**

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances; however, 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. 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, virtually 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.



**Position Description**

**Read and Acknowledged**

---

**Employee Signature**

---

**Date**

---

**Employee Name [printed]**