



## City of Lake Oswego, Oregon

### Job Description

#### ASSISTANT FINANCE DIRECTOR

**FLSA Status: Exempt**

**Union Representation: Non-represented**

**Salary Grade: 576**

**Job Code: 5064**

#### Class 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

*The list of duties is a representative sample of the work appropriate to this class and does not include all the duties that may be assigned to a particular position. The incumbent may perform a combination of some or all of the following duties:*

1. Assists in managing finance operations: develops and implements division work plans, procedures and reports; evaluates program performance and effectiveness, and initiates program improvement actions. Authorizes payments to contractors and consultants.
2. 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.
3. Assists with the coordinates 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.
4. Assists with the coordination of the Comprehensive Annual Financial Report (CAFR). Along with the Finance Director, meets with external auditors and the audit committee.
5. Coordinates and updates financial plans and reports, including bond issues and bond refunding; verifies for completeness and accuracy.
6. Develops work plans, timelines and resource allocations for assigned projects. Monitors to ensure objectives are met.
7. Provides technical advice and assistance to City departments.
8. Develops proposals for generating revenues and reducing costs.
9. Represents the Finance Department and/or City to the public, in legal or administrative proceedings, to other organizations or entities upon request.
10. Makes presentations and provides comment and testimony upon request.
11. Performs other duties of a similar nature or level.

#### Minimum Qualifications

**Knowledge of:**

- Generally Accepted Accounting Principles (GAAP).
- Governmental accounting principles.
- Laws and regulations governing municipal budgeting in Oregon.
- Automated accounting systems and procedures.
- Research techniques and methods, and application to budget analyses and projections.
- Management and supervisory practices and principles.
- Personal computers and related software applications.

**Skills and Abilities to:**

- Supervise and coordinate the work of others.
- Demonstrate leadership behavior.
- Analyze and evaluate fiscal operations; define fiscal problems; develop appropriate recommendations to resolve fiscal problems.
- Develop revenue and expense projects and long-term financial forecasts.
- Prepare clear and accurate administrative and financial reports.
- Interpret and explain policies and procedures effectively.
- Establish and maintain effective working relationships with employees and members of the public.
- Make effective oral presentations.
- Develop and implement written policies and procedures.
- Collect, interpret and evaluate data effectively and objectively.
- Provide good customer service.
- Comply with safety requirements of the position and actively promote safe work practices.
- Communicate effectively with coworkers, management, elected officials and the general public, and display excellent interpersonal skills and awareness of controversial and/or sensitive issues.

**Education, Training and Experience:**

A typical way of obtaining the knowledge, skills and abilities outlined above is with a Bachelor's degree in Accounting, Finance, Business Management, Public Administration or related field and five years related experience; or, an equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above. Certified Public Accountant preferred.

**Licensing and Other Requirements:**

Positions in this classification require the ability to possess and maintain a valid driver's license and ability to meet the City's driving standards.

**Physical and Mental Demands**

Frequent repetitive motions including, but are not limited to, hand, wrist and finger movements; daily walking, reaching, standing, talking, hearing and seeing. Sedentary Work: Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently or constantly to lift, carry, push, pull or otherwise move objects, including the human body. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

Persons with disabilities may be able to perform the essential duties of this class with reasonable accommodation. Reasonable accommodation will be evaluated on an individual basis and depend, in part, on the specific requirements for the job, the limitations related to disability and the ability of the hiring department to accommodate the limitation.

---

**Department Director**

**Date**

---

**Human Resources Director**

**Date**

---

**Employee**

**Date**

*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.*