



City of Lake Oswego, Oregon

Job Description

FINANCE DIRECTOR

FLSA Status: Exempt

Union Representation: Non-represented

Salary Grade: 460

Job Code: 5065

Class Summary

Under general direction, provides leadership, management, direction, planning and goal setting for the City's Finance Department to ensure delivery of quality municipal services. The Director is responsible for strategic and financial planning for all financial issues facing the City and the Lake Oswego Redevelopment Agency. Also conducts special projects as assigned by the Assistant City Manager and City Manager.

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. Supervises Finance Department staff, including prioritizing and developing work plans, evaluating performance, monitoring progress on reports and projects, interpreting policies and procedures, making hiring and termination recommendations, making pay rate change recommendations, and providing training and development for staff.
2. Advises the Assistant City Manager, City Manager, City Council, Boards, and Commissions on financial matters, including providing recommendations as needed.
3. Responds to requests for information from the Assistant City Manager, City Manager, Council, Boards, Commissions, and other outside agencies, including identifying information needed and report format. Reviews reports prepared by staff, including determining completeness and accuracy.
4. Responsible for ensuring the timely completion and accuracy of the City's Annual Budget and Comprehensive Annual Financial Report, including preparation of financial forecasts, issuance of debt, preparation of rate analysis for the City's utility systems, and financing of capital improvements.
5. Responsible for oversight of the Lake Oswego Redevelopment Agency's Annual Budget and Report on Audited Financial Statements, including preparation of financial forecasts, issuance of debt and financing of capital improvements.
6. Responsible for development and implementation of the City's financial policies and City's Strategic Financial Plan.
7. Ensures that the City's Budget, accounting systems and reports are in compliance with all appropriate legal and regulatory requirements, and Generally Accepted Accounting Principles for municipal agencies.

8. Ensures that all City purchases comply with adopted contracting regulations and procedures
9. Develops and pursues opportunities to create efficiencies within the agency while continuing to improve the organization's performance
10. Performs other duties of a similar nature or level.

Minimum Qualifications

Knowledge of:

- Management theories and principles.
- Concepts, principles and practices of municipal fiscal administration including budgeting, investments and financial reporting.
- Financial projection techniques.
- Finance modeling techniques.
- Debt financing theories and principles.
- Local, state and federal laws governing revenues and expenditures.
- Generally Accepted Accounting Principles (GAAP).
- Governmental accounting principles.
- Laws and regulations governing municipal budgeting in Oregon.
- Personal computers and related software applications.

Skills and Abilities to:

- Apply management theories and principles.
- Plan, develop and implement fiscal management practices and systems.
- Manage investment programs.
- Manage debt financing.
- Prepare informational analyses and performing problem solving to assess large amounts of information and formulate decisions.
- Make presentations.
- Communication, interpersonal skills as applied to interaction with co-workers, supervisor, the general public, etc. sufficient to exchange or convey information and to receive work direction.
- 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 Finance, Business Management, Public Administration or related field and ten 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.

Must be able to pass a pre-employment credit check and be able to be bonded in accordance to City 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.