



# CITY OF MEDFORD, OREGON

## FINANCE DIRECTOR

JOB TITLE: Finance Director	DEPARTMENT: Finance	
CLASSIFICATION: Exempt	POSITION #: 108	GRADE: E35
UPDATED: August 2015	<input checked="" type="checkbox"/> Approved by Human Resources Director <input checked="" type="checkbox"/> Approved by City Manager	

### SUMMARY:

Under general administrative direction of the City Manager, oversees citywide fiscal responsibilities, directs the control of City finances and the City Treasury. Administers and reviews fiscal, organizational, management and procedural operations of the various divisions, such as: Finance, Municipal Court and Purchasing divisions.

Develops and implements financial and accounting policies and procedures affecting all divisions and City departments. Key performance areas include financial planning, accounting operations, management and administration. This position reports to the City Manager and is classified as an "at-will" position.

### ESSENTIAL DUTIES/RESPONSIBILITIES:

These duties are a representative example; position assignments may vary depending on the business needs of the department and organization. This position:

#### FINANCIAL PLANNING:

- Assists in the preparation and presentation of the City budget. Serves as custodian of the City Treasury.
- Reviews audited financial reports and multi-year financial plans.
- Initiates, coordinates and supervises financing for all City project funds, bonds and loans, and secures liability insurance for the City.
- Serves as liaison for designated committees and as the fiscal officer for MURA (Medford Urban Renewal Agency).

#### ACCOUNTING OPERATIONS:

- Directs the accounting systems of the City, including payroll, payables, receivables, property management and internal audits.
- Oversees the collection of taxes, assessments, fees and other revenue streams.
- Ensures timely financial reporting for departments, governmental agencies and auditors.
- Schedules and assists in preparation and review of annual audit and financial statements.

#### MANAGEMENT / ADMINISTRATION:

- Provides reports and documentation to/for City departments, City officials and executive staff.
- Prepares/reviews City budget, performs budget analysis, and provides revenue projections.
- Assists departments with future financial projects; conducts cost planning and analysis.
- Serves on a variety of boards, commissions and committees, and attends meetings.



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- Directs, supervises and evaluates the work performance of assigned staff, including selection, training, disciplinary action, etc.
- Maintains communication with City officials, department heads and outside agencies.
- Scope of assigned area will depend on departmental and/or citywide operational structure and is at the discretion of the City Manager.
- Upholds the values of the organization and has strong customer service orientation.
- Must have the ability to handle job stress and interact effectively with others in the workplace.
- Must be honest and truthful in all tasks and responsibilities.
- Performs other related projects and duties as assigned.
- Demonstrates regular, reliable and punctual attendance.

#### CORE COMPETENCIES:

##### **Executive Leadership:**

Incumbents should have a solid foundation of individual contributor and supervisory/management core competencies identified by the organization, as well as the following core competencies identified as essential for executive leadership:

**Strategic Thinking** - Effective performers act with the future in mind. They plan and make decisions within the framework of the City's strategic intent. They know and understand the factors influencing strategy (e.g., core competence, customers, and the organization's current strengths and limitations). They consider future impact when weighing decisions. They constantly think in terms of continually improving City services.

**Visioning** - Effective performers are imaginative. They are able to create a vision of a preferred future for their teams. They communicate it clearly and enthusiastically in such a way that others are attracted to it. They are able to bring the vision to life for team members.

**Diplomacy** - Effective performers work well within the City's power network. They are perceptive to social cues in the environment. They recognize personal agendas. They are skilled at handling situations without arousing hostility, and are able to navigate the political waters of the City. They forge coalitions and know how to stay viable within the system.

**Business Thinking** - Effective performers see the City as a series of integrated and interlocking business processes. They understand general business concepts that govern these systems and their interfaces. They create and/or realign these systems in response to changing needs. They understand that a change in one process can have dramatic and unintended impact across the entire City. They are adept at using these interdependencies to synergistic advantage.

**Risk-Taking** - Effective performers have a history of, and propensity for, taking calculated chances to achieve goals. They find a balance between analysis and action. When they fail, they accept it, learn from it, and move on to the next challenge.



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**Financial Acumen** - Effective performers understand the financial framework of the City. They establish and monitor appropriate financial measures (e.g., balance sheet, income statement, cash flow, etc.). They interpret and use financial data to make informed business decisions.

**Presentation Skills** - Effective performers are able to organize and deliver public speeches that effectively inform or persuade audiences. They are adept at using current presentation technologies and media formats. They are able to field audience questions comfortably and confidently.

**Assertiveness** - Effective performers readily offer opinions and take action even when their position may be unpopular. They are willing to challenge others appropriately when required. They are self-confident – they trust their own judgment and are not overly dependent upon the approval of others.

**Global Mindset** - Effective performers see the City's business in a global context. They look beyond their own borders for opportunities for continuous improvement.

**Leader Identification** - Effective performers identify with the role of leader, and enjoy positions of responsibility and the exercise of authority. They understand that management is a distinct vocation, and choose to be in a leadership position.

**Government Knowledge** - Effective performers understand the general workings of the legal requirements within which the City functions. They monitor activities and trends within these requirements and maintain a current knowledge base. They use this knowledge to further the City's goals.

#### QUALIFICATIONS/EXPERIENCE:

- Significant years of leadership and management experience to perform the job effectively; and
- Graduation from an accredited college or university with a bachelor's degree, master's degree preferred, in a specific area of study as deemed necessary, ideal, or required; and/or equivalent combination of education and experience sufficient to successfully perform the essential duties of the job such as those listed above.
- Current technical/professional knowledge of complex principles, methods, standards and techniques associated with the scope of work of a recognized profession, such as:
  - Knowledge of laws, rules and regulations concerning the operation of municipal government.
- Possession of licenses and/or certifications associated with the assignment, such as:
  - Certified Public Accountant (CPA).
- May require possession of a valid driver's license by date of hire. New employees establishing resident status in the State of Oregon must obtain an Oregon driver's license within 30 days (ORS 807.020 (1)).
- Requires completion of a background investigation to the satisfaction of the City.



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PHYSICAL DEMANDS / WEIGHT DEMANDS / WORK ENVIRONMENT					
KEY	Never 0%	Seldom 1-5%	Occasionally 6-33%	Frequently 34-66%	Continuous 67-100%

Physical Demands:	0%	1 – 5%	6 – 33%	34 – 66%	67 – 100%
Sitting	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Standing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Walking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Talking	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Hearing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Seeing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Climbing	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Kneeling/Crouching	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Bending/Stooping	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Twisting	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reaching	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Moving/Transporting	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Driving	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Pushing/ Pulling:	0%	1 – 5%	6 – 33%	34 – 66%	67 – 100%
1-10 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
21-50 lbs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-75 lbs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
76 –100 lbs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
>100 lbs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Lifting:	0%	1 – 5%	6 – 33%	34 – 66%	67 – 100%
1-10 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
11-20 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
21-50 lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
51-75 lbs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
76 –100 lbs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
>100 lbs.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Carrying:	0%	1 – 5%	6 – 33%	34 – 66%	67 – 100%
1-25 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
26-50 lbs.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
50+ lbs.	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Conditions:	0%	1 – 5%	6 – 33%	34 – 66%	67 – 100%
Indoor	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Outdoor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
H/C Temp.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Loud Noise	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fumes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



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I have read and understand the job description for my position. I am able to perform all the essential functions of this position. I agree to comply with City policies and all laws, rules and regulations related to my position.

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Employee \_\_\_\_\_ Date \_\_\_\_\_

I have read and reviewed this document with this employee.

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City Manager \_\_\_\_\_ Date \_\_\_\_\_