



THE STATE BAR OF CALIFORNIA

OFFICE OF HUMAN RESOURCES

845 SOUTH FIGUEROA STREET, LOS ANGELES, CA 90017-2515 (213) 765-1100 • 180 HOWARD STREET, SAN FRANCISCO, CA 94105-1639 (415) 538-2351

FINANCE MANAGER

Office: Finance
Status: Exempt - Executive
Grade: 54

ORGANIZATIONAL RELATIONSHIPS

Reports to: Chief Financial Officer, or Designee
Supervises: Staff as Assigned

DEFINITION

Finance Manager (FM) serves under the direction of the Chief Financial Officer (CFO) or designee and is directly responsible for managing and administering the State Bar's finance operations as assigned which include budgeting, fiscal planning, financial analysis, financial reporting, general and special fund accounting, accounts payable and receivable, collections, payroll and employee benefits, member billing, capital asset, treasury management, internal controls, audits and other related activities consistent with accepted prudent financial and accounting standards and other relevant governing authorities.

MAJOR DUTIES & RESPONSIBILITIES

1. Serves under the direction of the CFO and establishes and maintains effective working relationships with colleagues within the State Bar, and professional relationships with external constituencies of the State Bar.
2. Manages and administers the State Bar's finance operations as assigned which include: budgeting, fiscal planning, financial analysis, financial reporting, general and special fund accounting, accounts payable and receivable, payroll and employee benefits, member billing, capital asset, collections, treasury management, internal controls, audits and other related activities in accordance with accepted financial and accounting standards.
3. Supervises staff including hiring, coaching, training, monitoring, and evaluating job performance consistent with overall State Bar policy.
4. Assists in developing, implementing and monitoring fiscal policies, procedures, strategic plans, systems and related initiatives including budgets, forecasts and financial projections and reports consistent with prudent accounting standards and the operational standards and policies of the State Bar.
5. Assists in formulating and implementing short-term and long-term goals, business projects and plans to improve the efficiency and efficacy of the State Bar's fiscal affairs, processes and operations including budget instructions, policy development, procedures and guidelines to be used by every unit and cost center within the State Bar.

6. Oversees and leads the month-end and year-end close process, coordinates the annual audit budgeting and planning processes, administers and reviews all financial budgets; monitors progress and changes and keep senior management team abreast of the organization's financial status.
7. Oversees all annual report filings, including payroll tax reports, financial and budget reports and other legislative report filings.
8. Coordinates and assists in initiating as appropriate, inter-office projects, system upgrades, and other related programs and activities.
9. Assists in providing fiscal policy guidance and staff assistance to internal and external customers updates and implements all necessary business policies and accounting practices; improves the Department's overall policy and procedure manual.
10. Provides support for one or more State Bar Committees as assigned.
11. Presents fiscal and budget information and results to State Bar staff, Board Committees and other stakeholders.
12. Assumes other duties and responsibilities as assigned.

KNOWLEDGE & SKILLS

1. Principles of accounting, Government Accounting Standards, auditing, budgeting, internal controls, financial reporting, accounts payable, accounts receivable, financial analysis, special/general fund accounting, payroll, capital asset and treasury management.
2. Knowledge and experience in strategic planning, operations, policy development and implementation.
3. Institutional management, office management, budgeting, administration, and supervision.
4. Problem identification, analysis and solving skills to support and enable sound decision making.
5. Principles of centralized information and data base management and record keeping systems.
6. Effective written and oral skills, including public speaking.
7. Public relations/customer service, board and committee administration, organizational behavior, conflict resolution and effective personnel management in an union environment.
8. Team building and leadership.
9. Multi-tasking and ability to set priorities.

ESSENTIAL ELEMENTS / ABILITY TO

1. Communicate clearly and effectively in person, by telephone, by computer and in writing.
2. Possess visual capability and digital dexterity to operate a computer and other standard office equipment.
3. Travel by air and automobile.
4. Make fine visual distinctions upon proofreading written documents and viewing information on a computer screen.
5. Speak publicly to large groups of people.
6. Perform under stress and adopt effective courses of action.
7. Effectively interact with others.
8. Effectively address conflict.

MINIMUM QUALIFICATIONS

1. Bachelor's Degree in finance, accounting, or equivalent academic achievement.
2. Demonstrated verifiable reputation for integrity.
3. Excellent problem solving, communication and leadership skills.
4. Minimum four (4) years progressively responsible experience in institutional financial management in a non-profit, public sector or similar environment or equivalent.
5. Minimum two (2) years management/supervisory experience administering personnel and budget requirements.
6. Master's Degree in a relevant field or CPA with auditing experience preferred.

Revised June 2016