



# 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

## DIRECTOR, FINANCE

Office: Finance  
Status: Exempt -- Executive  
Grade: 57E

### ORGANIZATIONAL RELATIONSHIPS

Reports to: Chief Operating Officer or other Chief Executive assigned  
Supervises: Staff as assigned

### DEFINITION

The Director, Finance (DF) serves under the general oversight of the Chief Operating Officer (COO) or other Chief Executive assigned and is responsible for overseeing, planning, organizing and directing the State Bar's financial affairs. This includes budgeting, long-term and short-range fiscal planning, financial analysis and reporting, payroll, employee benefits administration, general and special fund accounting, investment policy administration, member billing and related responsibilities consistent with accepted financial, budget and accounting standards. The DF is a member of the State Bar's Senior Executive Team and is responsible for overseeing budget and personnel in the Finance Department as well as administering the State Bar's institutional budget and financial affairs subject to the Executive Director's overall responsibility to administer the budget, personnel, facilities and related support activities in accordance with policy parameters established by the Board of Trustees.

### MAJOR DUTIES & RESPONSIBILITIES

1. The DF oversees the State Bar's Finance Department and the State Bar's institutional financial affairs.
2. The DF serves as a member of the Senior Executive Team (SET) and establishes and maintains effective working relationships with colleagues within the State Bar and professional relationships with external constituencies of the State Bar.
3. The DF oversees the planning, development and administration of all fiscal, budget and accounting functions, including: long-term and short-term budgeting, long and short-range fiscal planning and forecasting; financial analysis and reporting; investment policy administration; special and general fund accounting, payroll and employee benefit administration, accounts payable and receivable, and related responsibilities in accordance with accepted and prudent accounting and budgeting standards, subject to the general oversight of the COO.
4. The DF provides active performance management of assigned staff, and ensures that subordinate supervisors and managers are practicing effective performance

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management consistent with over-all State Bar policy, subject to the general oversight of the COO.

5. The DF oversees the development and implementation of fiscal policies and budget policies, procedures, systems and related initiatives consistent with prudent accounting standards and the operational standards of the State Bar, subject to the general oversight of the COO.
6. The DF oversees the formulation and implementation of short-term, and long-term goals and plans to improve the efficiency and efficacy of the State Bar's fiscal and budget affairs, processes and operations including policies, procedures and guidelines, to be utilized by every unit and department within the State Bar, subject to the general oversight of the COO.
7. The DF represents the State Bar on fiscal and budget matters related to the Board of Trustees and other constituencies.
8. The DF oversees and initiates as appropriate, inter-office projects, programs and activities.
9. The DF provides policy guidance and staff assistance to the Board of Trustees and other ad hoc Board Committees and taskforces as required.
10. The DF timely responds to inquiries from Board Members, the Judiciary, the Legislature, the Governor's Office, auditors and other constituencies regarding fiscal and budget matters in coordination with the COO and Executive Director.
11. The DF assumes other duties and responsibilities as assigned.

### **KNOWLEDGE & SKILLS**

1. Advanced principles of accounting, auditing, budgeting, financial controls and reporting, and financial analysis, including Government Accounting Standards and special/general fund administration, payroll and benefit administration and investment policy.
2. Advanced principles of office management, budgeting, administration, and supervision.
3. Advanced principles of problem identification, analysis and resolution.
4. Advanced principles of public relations/customer service.
5. Advanced principles of board and committee administration.
6. Principles of effective oral and written communication.
7. Principles of computerized financial data and software systems.
8. Principles of centralized information and data based record keeping systems.

### **ESSENTIAL ELEMENTS / ABILITY TO**

1. Receive and relay detailed information through verbal and written communications.
2. Communicate clearly and effectively in oral and written formats.
3. Travel by air and automobile.
4. Review and analyze complex written and financial data.
5. Speak publicly to large groups to people.
6. Perform under stress and adopt effective courses of action.
7. Effectively interact with others.
8. Effectively address conflict.

### **MINIMUM QUALIFICATIONS**

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1. Bachelor's Degree in accounting, finance, business, public administration or equivalent academic achievement.
2. Minimum ten (10) years of experience in a progressively responsible experience in institutional financial management in a non-profit or public sector or similar environment interfacing with governing boards, or equivalent.
3. Minimum five (5) years senior level management/supervisory experience administering personnel and budget requirements.
4. A Master's Degree in a related field, a Juris Doctorate, or public accountant certification may substitute for up to two (2) years of experience.

*Revised February 2016*