



PHOTO: STEPHEN CASSIDY

# Assistant Finance Director





## THE COMMUNITY

One of the most diverse cities in the nation and located at the center of the dynamic San Francisco Bay Area, San Leandro is a safe, vibrant community of 91,000 residents with well-maintained neighborhoods, excellent public libraries, twenty-three public parks, quality local schools, and a wide range of shopping, dining, and entertainment options.

The City of San Leandro was incorporated in 1872 and is one of the oldest communities in the Bay Area. The City occupies 15 square miles and is situated between the cities of Oakland and Hayward. The western border of the City consists of over eight miles of pristine shoreline and amenities on the San Francisco Bay while a regional park and nature areas fall on the eastern border. San Leandro offers its residents the quiet charm and character of a community that has been established for more than 150 years and its businesses enjoy multiple advantages including close proximity to the Oakland International Airport, the Port of Oakland, two major freeways, two BART stations, and access to a large and well-educated work force.

Once an agricultural community, the City has been successful in attracting significant industrial, manufacturing and retail development. Through a public-private partnership known as Lit San Leandro, a fiber optic network encircles San Leandro's industrial and commercial core offering businesses virtually unlimited internet connectivity. The City has a diverse and strong economy, and continues to expand on its sound business base with the ongoing development of such projects as a multi-family housing development, a new regional hospital, and the continuing revitalization of downtown San Leandro.

For more information on this incredibly beautiful City, please browse [here](#).

## THE CITY GOVERNMENT

San Leandro is a Charter city with a Mayor/Council-Manager form of government. The City Council includes a Mayor and six Council members. The Mayor is nominated and elected at-large and Council members are nominated by geographical districts and elected at-large, each serving the entire community. The Mayor and Council members may serve a maximum of two consecutive four-year terms.

The City Council appoints the City Manager and City Attorney. With a total budget of \$218 M (\$143 M is General Fund) for FY2023-24 and approximately 470 FTE employees, the City provides a full range

of municipal services, which include City Manager, Community Development, Finance, Information Technology, Human Resources, Library, Police, Public Works, Human Services, and Recreation and Parks.

## THE FINANCE DEPARTMENT

The Finance Department is responsible for safeguarding the City's financial assets and for administering the financial activities of the City and its corporate bodies, including the Economic Development Agency, Public Financing Authority, and Parking Authority. The Department's primary objective is to uphold the highest accounting and ethical standards, ensuring that the City's financial activities are conducted in accordance with recommended industry practices and standards. The department is organized into three divisions: Administration, Budget and Compliance, and Accounting Operations. These divisions provide quality customer service and provide accurate, timely and complete financial information. The Department consists of 18 FTE's. Further, the Department has had a major influence in the City by being extremely team-oriented and collaborative and by embracing new technologies and management techniques. The team is entirely dedicated to public service and to getting the City's work done, efficiently and effectively.

To learn more about the Finance Department, browse [here](#).

## THE POSITION

Under administrative direction, the Assistant Finance Director assists in planning, organizing, managing, and providing direction and oversight for major functions and activities of the Finance Department, including financial planning, investment management, cash management, City-wide budget, accounting, fiscal planning, revenue collection, and debt management; assists with formulating departmental policies, goals, and directives; assists in coordinating assigned activities with other City departments, officials, outside agencies, and the public; fosters cooperative working relationships among City departments and with intergovernmental, regulatory agencies, and various public and private groups; provides highly responsible and complex professional assistance to the Finance Director in areas of expertise; and performs related duties as assigned.

### Distinguishing Characteristics

The Assistant Finance Director role is an assistant department director classification that oversees, directs, and manages the day-to-day operations of the Finance Department, including short- and long-term planning as well as development and administration of departmental policies, procedures, and services. This class provides assistance to the Finance Director in a variety of administrative, coordinative, analytical, and liaison capacities and serves as the department director in that individual's absence. Successful performance of the work requires knowledge of public policy, City functions and activities, including the role of the City Council, and the ability to develop, oversee, and implement projects and programs in a variety of areas. The incumbent is accountable for working with the Finance Director to accomplish departmental planning and operational goals and objectives, and to further the City's goals and objectives within general policy guidelines.

## Essential Duties

The typical job functions of the classification may include, but are not limited to, the functions below and are subject to changes in operational necessity.

- Assumes day-to-day responsibility for the Finance Department including the Administration, Budget and Compliance, and Accounting Divisions.
- Assumes full management responsibility for major Finance Department programs, services, and activities, including financial planning, investment management, cash management, City-wide budget, accounting, auditing functions and audit recommendation implementation, compliance, fiscal planning, revenue collection, and debt management including loan document preparation. Further, assists with planning, directing, and coordinating the department's work plan.
- Manages and participates in the development and implementation of goals, objectives, policies, procedures, and work standards for assigned functions and programs.
- Identifies opportunities for improvement and reviews with management staff; directs the implementation of improvements of policies, procedures, and financial management systems. Stays abreast of new trends and innovations.
- Selects, trains, motivates, and directs department personnel.
- Monitors legal, regulatory, technology, and societal changes, as well as court decisions that may affect the work of the department and City.
- Assists with developing and preparing the City's overall financial planning and management strategy for review by the Finance Director, City Manager and City Council to ensure the short- and long-term financial stability of the City; assists with the City's Annual Comprehensive Financial Report (ACFR) process.
- Represents the department to other City departments, elected officials, and outside agencies.
- Participates in and makes presentations to the City Council and a wide variety of committees, boards, and commissions; serves as chair for the Deferred Compensation Advisory Committee and Trustee for the City's Deferred Compensation Plan.
- Prepares, reviews, and presents a variety of reports and updates as assigned by the Director of Finance and the City Manager.
- Responds to public inquiries and complaints and assists with resolutions and alternative recommendations.
- Performs other related duties as assigned.

For the complete list of duties, essential knowledge and abilities, browse [here](#).



## IDEAL CANDIDATE

The ideal candidate has strong municipal or other public sector finance and finance management experience. An advanced degree is highly desirable. They are a change-agent that knows how to bring together team members, motivate them, help them develop and encourage them to advance professionally. This individual has the breadth of budget, accounting, audit and general finance experience to lead all three divisions of the Finance Department and support the Finance Director in the day-to-day running of the Department, as well as to help on special assignments directed to the Department by the City Manager. In addition, the following key attributes and characteristics are ideal.

### Key attributes and characteristics

- The goal is to give the Incumbent experience in leading all aspects of the Department without pigeonholing into any one function.
- Depending on fitness for the role, the Incumbent may be offered to directly lead either the accounting or budgeting divisions.
- Of key importance is the ability to and demonstrated experience in being a change-agent in terms of policies, procedures and technology. The Department has made great strides under its new leadership in modernizing the Department. The Incumbent will continue that progress into the future.
- The Incumbent will be a strong advocate for the professional development and further accreditation/education of their staff, continuing the Department's strong progress in these areas.
- The Incumbent will engender trust in a department that has a mix of long-serving and relatively new employees to create a dynamic team atmosphere.
- Experience and/or ability to assist the City with its new ERP software implementation.
- Be fully open to staff suggestions as to timing of and how to complete projects, as well as provide appropriate feedback on Departmental plans where appropriate.
- Be the kind of leader that provides support to their team.
- This person intimately understands the dynamics of public sector finance and compliance requirements.





## QUALIFICATIONS

### Experience and Education Guidelines

*Any combination equivalent to experience and education that would most likely provide the required knowledge and abilities would be qualifying. A typical way to obtain the knowledge and abilities would be:*

**Education:** Equivalent to a bachelor's degree from an accredited college or university with major coursework in finance, accounting, business administration, public administration, or a related field.

**Experience:** Five (5) years of increasingly responsible experience in municipal finance, accounting, or a related field, including three (3) years in a management capacity.

### Licenses, Certificates and Other Requirements

Possession and continued maintenance of a valid class "C" California driver's license if operating a motor vehicle is necessary to perform the essential functions of the position. Licensure as a Certified Public Accountant is strongly preferred but not required.

## COMPENSATION AND BENEFITS

**The annual salary is \$183,600 - \$223,176.** Placement within this range is dependent upon the education, experience, and qualifications of the successful candidate. *This role is currently scheduled for a 3.5% increase on July 1, 2024 (not reflected in the above range).*

In addition, the City offers the following excellent benefits:

- **Flexible schedule and Telework option** – allows for a 9/80 work schedule and work from home for up to two days per week.
- **Retirement** – CalPERS Defined Benefit Pension: 2% @ 55 for Classic employees; 2% @ 62 for new members (PEPRA employees). Classic members pay the full 7% employee contribution and new PEPRA members pay the full employee contribution which is currently 6.75%.
- **Social Security** – City participates in Social Security with a 6.2% contribution from the employee and employer.
- **Deferred Compensation** – City will match employee contribution up to 2% of base salary.

- **Medical Plan** – CalPERS Health with a choice of health insurance plans and monthly City contribution up to \$2,458.39. Generous in-lieu payment to employees who show proof of group health insurance coverage.
- **Dental Plan** – up to \$147.38 monthly City contribution.
- **Life Insurance** – \$50,000 City-paid policy with option to purchase additional coverage.
- **Long-term Disability Insurance** – 66.67% of monthly base earnings up to \$6,000/mo.
- **Retiree Medical & Dental** – available after vesting period.
- **Paid Leave and Holidays** – Vacation Leave accrues at a rate commensurate with total years of public sector experience in the field. Sick Leave accrues at 12 days per year with accrual cap of 2,400 hours (300 days). There are 14 paid holidays per year, plus one floating holiday.
- **Administrative Leave** – 80 hours per year. Pro-rated if hired after July. No carryover.
- **Optional Benefits** – Dependent Care and Medical Spending Accounts, vision care, short-term disability insurance, and others. Employee Assistance Program available.

This role is covered by the San Leandro Management Organization (SLMO). Browse [here](#) for more information and to review the applicable MOU.

## APPLICATION PROCESS

**The final filing date is Friday, March 8, 2024.** To be considered, please submit a resume, cover letter and five work related references (who will not be contacted in the early stages of the recruitment) to: <https://koffassociates.com/san-leandro-asst-finance-dir/>. Resumes should reflect years and months of positions held as well as size of past organization(s).

For additional information please contact:



Pete Smith, Senior Recruiter  
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Resumes will be screened based on the criteria outlined in this brochure. Candidates with the most relevant qualifications will be given preliminary interviews by the consultant. Koff & Associates will report the results to the City. The City will then select candidates to participate in panel interviews. Extensive reference and background checks will be completed on the selected candidate.

The City of San Leandro is an Equal Opportunity Employer (EOE) and as such does not discriminate on the basis of age, race, color, sex, gender, religion, ancestry, physical or mental disability, or marital status, sexual orientation, or national origin in its employment actions, decisions, policies and practices. If you require special accommodations, please contact Human Resources at (510) 577-3396 to discuss your needs.