

**CLASS SPECIFICATION**  
**CONTROLLER**

**PAY GRADE: 61**  
**CLASS CODE: 30003026**  
**EFFECTIVE: December 13, 2018**

**CLASSIFICATION SUMMARY**

Reports to the Director of the Bureau of Revenue and Financial Services (BRFS). Under minimal direction, responsible for managing and directing all activities of the Accounting Division within the BRFS. Classification is exempt from Civil Service.

Responsibilities include: managing staff responsible for performing professional accounting operations; coordinating and managing the preparation of the City's Comprehensive Annual Financial Report (CAFR); directing the development and monitoring the performance of the annual Division budget; collaborating with management of other Bureaus/Offices on accounting and financial practices, transactions, and technology system issues.

**DISTINGUISHING CHARACTERISTICS**

Controller is a single-incumbent, management-level classification within the Bureau of Revenue and Financial Services.

Controller is distinguished from the City Treasurer in that the former is responsible for Citywide accounting and fiscal activity and the latter is responsible for managing centralized treasury and is required by City Charter to be bonded.

**ESSENTIAL FUNCTIONS**

The incumbent may perform a combination of some or all of the following duties, and performs related duties as assigned.

General Duties:

1. Prepare for and respond to internal and external audits.
2. Manage and participate in the preparation of the City's CAFR.
3. Provide subject-matter expertise for establishing and revising accounting policies, complying with City Council directives, and ensuring financial sustainability of City functions; participate in Citywide and Bureau/Office management meetings and committees; participate in Ad Hoc committees; lead meetings with Division staff, accounting team leads, Accounting Advisory Committee, and special purpose committees.
4. Plan, direct, and evaluate the work of staff, including hiring, conducting annual evaluations, and training; develop annual training program for staff, including continuing education for licensing requirements.
5. Provide oversight related to performance requirements and personal development targets for staff; provide instruction for performance improvement and development; promote a positive employee relations environment; evaluate performance and complete annual performance

reviews; ensure that employees are provided with guidance and opportunity to correct deficiencies; ensure appropriate discipline procedures are implemented.

6. Provide leadership to attract, develop, and retain diverse, highly competent, service-oriented staff that support the City's and Bureau/Office's mission, objectives, and service expectations; create and promote an equitable workplace that demonstrates an environment respectful of living and working in a multicultural society.
7. Resolve accounting issues with Bureaus/Offices and provide oversight for the implementation of new accounting standards and regulations.
8. Update and participate in the development of Accounting Administrative Rules (AAR); present draft AAR's to City Council for approval.
9. Work with subordinate supervisors and staff to implement and monitor work plans to achieve performance measures and meet Division goals.
10. Direct budget development and administration, including forecasting resources needed for staffing, equipment, materials, and supplies; manage unit payroll and operating budgets; monitor budget to actual revenues and expenditures and suggest mid-year or other adjustments; direct and oversee cost/benefit and resource requirement analyses of the Division budget.

### **SUPERVISION RECEIVED AND EXERCISED**

The work of this classification is performed under minimal direction by the Director of the Bureau of Revenue and Financial Services.

Directly supervises employees. Indirectly supervises staff assigned to subordinate supervisors.

### **KNOWLEDGE/SKILLS/ABILITIES REQUIRED**

1. Thorough knowledge of principles and practices of governmental accounting, including applicable accounting standards and procedures such as Government Accounting Standards Board Generally Accepted Accounting Principles, Federal Energy Regulatory Commission, Federal Accounting Standards Board and American Institute of Certified Public Accountants Auditing Standards.
2. Thorough knowledge of Oregon's Local Budget Law, City Code, ordinances, fiscal policies, procedures, administrative rules, compliance guidelines, and procedures applicable to accounting, procurement, and contracting; state and federal securities and tax laws and regulations; relevant federal, state, and local laws, statutes, regulations, ordinances, and court decisions, and the ability to analyze, interpret, explain, and apply them.
3. Thorough knowledge of internal control standards and audit practices and procedures.
4. Thorough knowledge of the principles and practices of leadership, operational and strategic planning, business communication, public administration, program evaluation, and budget preparation and administration.
5. Thorough knowledge of principles of management, supervision, training, and performance evaluation.
6. Ability to communicate effectively, both verbally and in writing; present information, proposals, and recommendations clearly and persuasively in public settings; prepare clear, concise, and comprehensive reports and correspondence involving technical, budgetary, and financial data; communicate complex analytical topics to non-financial audiences.
7. Ability to apply analytic and problem-solving skills to independently develop sound decisions, conclusions, and recommendations.
8. Ability to establish and maintain effective working relationships with Bureau/Office staff, representatives of other governmental agencies, the public, and others encountered in the course of work.

9. Ability to collaborate with communities of color and people traditionally underrepresented in local decision-making; facilitate inclusive participation in programs and activities; communicate cross-culturally.
10. Ability to manage a multicultural workforce, promote an equitable workplace environment, and apply equitable program practices to diverse and complex City services.
11. Ability to utilize City-specific technology and general office software.

### **MINIMUM QUALIFICATIONS REQUIRED**

Any combination of education and experience that is equivalent to the following minimum qualifications is acceptable.

**Education/Training:** Bachelor's degree from an accredited college or university with major course work in finance, accounting, business administration, or related field;

AND

**Experience:** Ten (10) years of increasingly responsible experience managing programs, activities, and personnel within areas related to accounting, including three (3) years in a supervisory role.

### **Special Requirements and/or Qualifications:**

A Certified Public Accountant certification from the Oregon State Board of Accountancy.

### **Preferred Qualifications:**

Management experience working for a public agency.

Bargaining Unit: Non-represented

FLSA Status: Exempt

HISTORY

Revision Dates: