




ALLIANCE
RESOURCE CONSULTING LLC

Director of Finance
City of San José, CA

The Opportunity

A nationwide search is underway to attract a strategic, innovative, and experienced local government executive to serve as the City of San José's next Director of Finance. This is an incredible opportunity for a collaborative leader who will manage and oversee the financial condition of the City. The Department is responsible for ensuring financial affairs comply with all legal requirements and administrative regulation; protecting the financial integrity of the City; promoting financial accountability and protection from loss and fiscal responsibility; and ensuring that accounting practices and methodology produce full financial disclosure and prevent adverse audit opinions.

The City of San José

Known as the "Capital of Silicon Valley," the City of San José plays a vital economic and cultural role anchoring the world's leading region of innovation. Encompassing approximately 181 square miles at the southern tip of the San Francisco Bay, San José is Northern California's largest city and the 13th largest city in the nation. With nearly one million residents, San José is one of the most diverse large cities in the United States. San José's transformation into a global innovation center has resulted in one of the largest concentrations of technology companies and expertise in the world, including major tech headquarters like Cisco, Adobe, Zoom, Samsung, and eBay as well as start-ups and advanced manufacturing. San José has twice been named "The Most Innovative Large City in America" by the Center for Digital Government.

San José's quality of life is unsurpassed. Surrounded by the Diablo and Santa Cruz mountain ranges and enjoying an average of 300 days of sunshine a year, residents have easy access to the beaches along the California coast including Santa Cruz, Monterey, and Carmel; Yosemite and Lake Tahoe in the Sierra Nevada; local and Napa Valley wine country, and the rich cultural and recreational life of the entire Bay region. San José has received accolades for its vibrant neighborhoods, healthy lifestyle, and diverse attractions from national media including Business Week and Money magazines. For more information about the unparalleled quality of life in San José, please visit <https://www.sjeconomy.com/why-san-jose>.

In 2011, the City adopted *Envision San José 2040*, a long-term growth plan that sets forth a vision and a comprehensive road map to guide the City's anticipated growth through the year 2040. The Plan embodies the City's "more urban future," proactively directs significant anticipated growth in new homes and workplaces into transit-accessible, infill growth areas and supports evolution toward a more urban landscape and lifestyle. The San José area is powered by one of America's most highly educated and productive populations. More than 40% of the workforce has a bachelor's degree or higher, compared with 25% nationally. Forty percent of San José residents are foreign born, and 50% speak a language other than English at home. San José is proud of its rich cultural diversity and global connections, and the essential role the city plays in connecting residents and businesses to the nation and the world.

The City Government

The City of San José is a full-service Charter City and operates under a hybrid Council-Manager form of government. The City Council is comprised of 10 council members elected by district and a Mayor elected at large. The City Manager, who reports to the Council, and her executive team provide strategic leadership that supports the policy-making role of the Mayor and the City Council and motivates and challenges the organization to deliver high quality services that meet the community's needs. The City actively engages with the community through Council-appointed boards and commissions.

In addition to providing a full range of municipal services including police and fire, San José operates an international airport, municipal water system, a regional wastewater treatment facility, over 200 neighborhood and regional parks, and a library system with 24 branches. The City also oversees convention, cultural, and hospitality facilities, including the San José McEnery Convention Center, Center for the Performing Arts, California Theater, Mexican Heritage Plaza, and the SAP Center San José – home of the National Hockey League's San José Sharks.

City operations are supported by 6,994 full time equivalent positions and a total budget of approximately \$6 billion for the 2024-2025 fiscal year. San José is dedicated to maintaining the highest fiscal integrity and earning high credit ratings to consistently deliver quality services to the community. Extensive information regarding San José can be found on the City's website at www.sanjoseca.gov.

The Finance Department and Position

The Finance Department's mission is to manage, protect, and report on the City of San José's financial resources to enhance the City's financial condition for residents, businesses, and investors.

Supporting this work is a staff of 131 full-time equivalent positions with an annual operating budget of \$27.4 million for fiscal year 2024-2025. The Department is responsible for oversight of an additional \$63.2 million primarily related to debt service and Citywide expenditures. The Director is responsible for the management oversight of a \$2.5 billion investment portfolio; \$4.9 billion debt portfolio; financial reporting for \$5 billion in annual expenditures; billing, compliance monitoring and accounts receivable collections of over \$1.3 billion in annual revenue; and annually over \$200 million in products and services procured.

The Finance Director reports to and serves as a key advisor to the City Manager. The Director's Executive Management Team includes an Assistant Director, and four Deputy Directors.

The Finance Department has four core divisions:

Accounting, including a City-wide Fiscal Recovery and Grants Management Unit: Facilitate timely and accurate payment of the City's financial obligations, provide accurate and meaningful reporting on the City's financial condition, and manage all financial services in support of emergency response and community and economic recovery activities. Distinction in financial reporting is recognized by the receipt of the Government Finance Officers' Association's Certificate of Achievement for Excellence in Financial Reporting for 34 consecutive years.

Debt & Treasury Management: Provide cost-effective financing, investment, and cash collection of the City's resources to maintain and enhance the City's financial condition.

Purchasing & Risk Management: Purchase and provide quality products and services in a cost-effective manner and ensure insurance coverage for the City's assets. Recognized with the Achievement of Excellence in Procurement Award from the National Procurement Institute (2022).

Revenue Management: Bill and collect City resources to enhance the City's financial condition.

The Finance Department works in partnership with the departments of Human Resources, Information Technology, and Public Works as the Strategic Support City Service Area to effectively develop, manage and safeguard City fiscal, physical, technological, and human resources to enable and enhance the delivery of City services and projects.

Additional information regarding the Department's core services, related programs, and budget can be found in the [Finance Department Budget Summary](#).

Executive success in the City of San José is defined by an ability to sustain work that delivers on the City's Manager's *One Team* Leadership Values and Expectations. The City of San José is seeking proven Finance Director candidates with a passion for working in a fast-paced and high-profile environment who bring their executive leadership capabilities, in addition to the following specific knowledge, skills and abilities:

- ▶ Experience in establishing and maintaining controls for assets, revenues and expenditures and providing financial, purchasing and communication services to others on a timely basis to enable them to perform their functions.
- ▶ Ability to direct accounting methodology to comply with various accounting principles described by different authorities granting agencies and joint powers agreements in which it participates.
- ▶ Ability to prepare recommendations concerning fiscal management and to take action to ensure compliance with applicable State law and other administrative regulations;
- ▶ Knowledge of the principles of accounting and auditing and centralized accounting operations and data processing applications to accounting systems;
- ▶ Knowledge of budgeting principles, centralized purchasing practices, banking practices, and methods involved in the receipt, custody and disbursement of money;
- ▶ Proven leadership and management of large programs with commensurately large budgets and funding mechanisms;

- ▶ Demonstrated ability for fiscal management and stewardship;
- ▶ Experience centering data driven goals in equity and maintaining a consistent commitment to equity and inclusion;
- ▶ Ability to direct sound fiscal operating and control policies;
- ▶ Ability to engage, build trust, and sustain a working relationship across a wide range of internal and external stakeholders and partners;
- ▶ Demonstrated ability to recruit, manage, and retain a high performing workforce, including building a positive workplace culture, implementing principles of effective and transparent communication, and ensuring internal staff development;
- ▶ Excellent oral and written communication skills which enable the unbiased, clear, concise, and data driven presentation of information and recommendations to the City Manager, Mayor and City Council, community members, and other stakeholders on complex, controversial, or sensitive issues;
- ▶ Proven ability to build trust by communicating honestly, collaborating, and delivering equitable outcomes with all levels of the organization and with all interested stakeholders in the community;
- ▶ Respect for and support of all the policies and directions set by the Mayor and City Council through the City Manager; and
- ▶ Ability to be politically astute and aware of how behaviors, policies, and practices look to others, whether by the Mayor and City Council, Senior Staff, colleagues, employees, the public, or the news media.

Education and Experience

Education: Any combination of training and experiences equivalent to a successful completion of advanced undergraduate course work in accounting, finance or a related field from an accredited college or university. Advanced degree is highly desirable.

Experience: Ten (10) years of experience in fiscal management or budgetary control or related work, five (5) of which must have been at a management and policy-making level with direction of professional accounting or fiscal management.

Compensation

The annual salary range for this position is \$192,774 to \$312,257 per year. In addition to the above-mentioned compensation, this position also receives an approximate five percent (5%) ongoing non-pensionable compensation. The final candidate's qualification and experience will determine the actual salary. For more information on employee benefits, visit the City's [Human Resources Benefits website](#).

Recruitment Process

This recruitment will be handled with strict confidentiality. References will not be contacted until mutual interest has been established. Confidential inquiries are welcomed to:

Sherrill Uyeda

Office: (562) 901-0769 x331

E-mail: suyeda@alliancerc.com

Interested candidates are encouraged to apply **online** including a cover letter and resume by **September 23, 2024** at www.allianceRC.com.

Preliminary interviews are tentatively scheduled during the week of **September 30, 2024**.

The City of San José is an equal opportunity employer. Applicants for all job openings will be considered without regard to age, race, color, religion, sex, national origin, sexual orientation, disability, veteran status, or any other consideration made unlawful under any federal, state or local laws. The City of San José is committed to offering reasonable accommodations to job applicants with disabilities.