**Senior Finance Officer (Business Analyst)**

**Location:** Happy Valley, Oregon, USA

**Position Status:** Full-time, Exempt, Regular

#### **About Sunrise Water Authority**

**Our Mission & Vision:** Provide a safe, reliable supply of water from a sustainable, efficient, customer focused organization founded on excellence.

#### **The Finance Department**

Sunrise Water Authority's Finance Department oversees the organization's finance, accounting, treasury, payroll, and procurement functions. The Finance Department develops and administers SWA policies, procedures, and internal controls that govern the financial & procurement functions of the organization. Sunrise operates in compliance with all applicable legal frameworks.

#### **The Position**

The Senior Finance Officer (Business Analyst) (SFO) serves as a senior member of the finance team and provides an enhanced level of expertise in the areas of financial processes, management, and business analytics to enable the effective delivery of the Finance Department goals and objectives. The SFO will contribute to (and lead as assigned) critical phases in the life cycle of policy and process development/implementation, focusing on specific components that require increased technical expertise. The position will partner in/lead the identification, development, and application of a suite of financial management reports and other business analytics to build efficiencies and organizational transparency. The role is expected to mentor, train, and guide team members to increase the effectiveness of the finance department within Sunrise.

#### **Essential Responsibilities**

CORE FUNCTION ACTIVITIES

* Play a critical role in the development and maintenance of Sunrise’s business analytic tools. The position will coordinate and lead processes to identify, develop, update, modify, maintain, and customize business analytic data and reporting functionality. The following are a few examples of business analytic workstreams:
  + Financial reporting tools (i.e., Payroll and Benefit reporting, Cashflow Management, Budget versus Actual reports, other financial monitoring reports, etc.)
  + Data analysis and reporting of utility billing and meter consumption information.
  + Key performance indicator & organizational metrics dashboard
* Share financial review responsibilities with the Finance Director to ensure finance workflow and processes are accurate and completed with the proper segregation of duties.
* In close coordination with HR and under the direction of the Finance Director, manage the finance department responsibilities associated with payroll processes to ensure efficient and effective implementation. Includes but is not limited to recurring payroll processing & ad hoc payroll issuances, tax calculations withholding, filing & remittance, PERs calculations, reconciliations, filing & remittance, other benefit and withholding calculations, reconciliations, and remittances (as necessary). List non-exhaustive.
  + Manage the relationship with the contracted payroll service provider as a representative of Sunrise.
* Participate and lead (as directed) month and year end processes, reconciliations, financial adjustments, etc.
* Enhance Sunrise's ability to realize process improvements by identifying and refining financial and procurement workflows. Work closely with relevant stakeholders to enhance efficiency, address complex challenges, and implement solutions for process gaps. Collaborate with the Finance Director to establish and maintain best practices in accounting, budgeting, costing, and reporting, ensuring sustainable and efficient operations throughout financial and procurement cycles.
* Research and provide financial & procurement technical guidance to queries related to process procedure.
* In partnership with the Finance Director, administer Sunrise’s financial system of record to ensure quality of information and optimal effectiveness.
  + Advise on and support linkages with other ERP, IT platforms, & reporting mechanisms (as appropriate). Examples include software management for procurement, human capital management, payroll, time & attendance, service/workorder processes, asset inventory management, etc.
* Assist with coverage when finance team members are traveling or on leave.

POLICY REVIEW & RECOMMENDATION

* Participate as a finance representation in organizational initiatives (as assigned)
* Develop/Support systems for documenting, storing, and sharing policies, standard operating procedures (SOPs), and financial & other business practices.

AUDIT ASSISTANCE

* In coordination with the Finance Director:
  + Partner on the preparation and support of the Annual Comprehensive Financial Report and corresponding audit including preparing assigned audit reconciliations, schedules, and gathering/compiling other information as needed.
  + Partner in the development and implementation of audit action plans (both internal and external) including providing requested information & responses to audit queries and management letters.
* Support financial & compliance audits/reviews conducted by internal and/or external parties as requested and directed by the Finance Director.

STRATEGY AND PLANNING

* Develop guidance, tools, templates, and processes for financial & procurement management as agreed with Finance Director.
* Build expertise to expand business analytic reporting (Tableau, Power BI, etc.).

TRAINING & DEVELOPMENT

* In collaboration with the Finance Director and other SWA Leadership (as requested), develop training webinars, SOPs, and/or modules relevant to advance team member understanding of key processes, etc. (in particular, the areas of expertise described within this position description)
* Remain aware of and up to date on new laws and regulations affecting areas of responsibility.

Other duties as assigned or requested.

#### **Supervisory Responsibility**

This position has no direct supervisory responsibility.

#### **Accountability**

**Reports Directly To:** Finance Director

**Works Directly With:** All Departments and Teams within Sunrise (Administration, Customer Service, Technical, Finance, & Operations).

#### **Accountability to Customers and Stakeholders**

Sunrise Water Authority team members are expected to support all efforts toward accountability, specifically to our utility customers, community partners, regulatory bodies, and other stakeholders.

#### **Minimum Qualification & Transferable Skills**

* Minimum of 5 years’ experience working in finance, compliance, or similar capacity with progressive professional growth. Experience in public finance a plus.
* BA/S or equivalent in accounting or relevant field. Professional certifications a plus
* Demonstrated experience and skill with creating templates and tools in Excel, as well as written guidance and training materials.
* Effective communication skills, both with members inside and outside the department and internal and external to the agency; ability to clearly communicate ideas both verbally and in writing.
* Strong interest and capability to envision new or improved systems and workflows.
* Demonstrated mentoring & training skills to advance other team members’ understanding of finance & procurement processes.
* Proven ability to successfully communicate project purposes, goals and objectives and initiate and maintain positive relationships with staff and external partners.
* Knowledge of rules and regulations governing the financial compliance/regulatory management of public resources is preferred.
* Experience with MS Office and accounting (general ledger) software is required.
* Demonstrated experience and understanding of generally accepted accounting principles, financial reporting, accounting systems, and financial administration is required.

#### **Success Factors**

The successful Senior Finance Officer will have a strong understanding of government finance and accounting in the public sector. The ability to thrive in a fast-paced, multi-tasking environment while maintaining the respect of staff and colleagues is essential for this position. The most successful Sunrise Water Authority staff members have a strong commitment to teamwork and

accountability, and make effective communication a priority in all situations. Sunrise Water Authority is a highly collaborative organization that encourages strong self-initiative as well as team spirit. To succeed in this environment, the candidate should be highly organized and innovative. They should also demonstrate proud workmanship, effective communication, and collaborations skills.

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#### **Environmental Conditions**

The position functions primarily in an office environment. Position requires extensive use of a computer workstation and associated peripherals and continuous communication with others that requires hearing, listening and talking, either in-person or over telephone, VoIP, or other communication platform. Position must attend some evening meetings, but most work occurs during the organization’s regular business hours.

This position may also require physical ability to lift up to 25 lbs occasionally; sitting in a normal seated position for extended periods of time; occasionally stooping, bending, kneeling, lifting, pushing and carrying items; continuously being mobile, frequent walking.

#### **Ongoing Learning**

In support of the belief that learning organizations are more effective, efficient, and relevant to the communities we serve, we empower all team members to dedicate time to learning activities that further their professional growth and development.

#### **Equal Employment Opportunity**

Sunrise Water Authority is an equal opportunity employer that does not tolerate discrimination on any basis.

#### **Signatures**

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Employee Date

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Supervisor Date