



- Executes financial dashboards and report results to management, board of directors and membership (such as monthly, quarterly and year-end closing reports and schedules);
- Works closely with leadership team to manage federal, state and private grants, and prepares timely and accurate budgets, financial reports and complies with draw down requirements;
- Establishes and maintains cost allocation process in compliance with requirements for management of federal funds, including month end journal entry process;
- Monitors all banking and investment activities and ensure adequate organizational cash flow;
- Responsible for the development and maintenance of timely and accurate systems to maintain the general ledger, journals and source documents;
- Oversees all payroll activities, including timesheets, taxes, withholdings and other deductions. This includes a semi-annual time study for all staff;
- Facilitates the budget process: working with the Executive Director and Managers of Budgets to create annual budget for review by finance committee and approval by the board of directors;
- Leads the Managers of Budget (MOB) committee, helping to connect a complex financial system with the need to manage grant/program budgets; leads technical aspect of annual Bureau of Primary Health Care grant application submission including working with program leads on budget development;
- Analyzes current fiscal technology and system(s) and explores expanded or new technology/systems that support OPCA growth, efficiency, and financial stability. Maintains efficient fiscal technology and system(s) to keep with current growth and technological advances;
- Oversees accounts payable and accounts receivable.
- Maintains compliance with OPCA's non-profit tax status and overall fiscal operations.
- Updates job knowledge by remaining aware of new regulations and best practices; participate in educational opportunities; reads professional publications; maintain professional networks; and participates in professional organizations.

#### **Human Resources & Benefits Administration**

- Works in collaboration with Investment Committee at OPCA to provide support to our two retirement plan trustees; sets up twice a year committee meetings to evaluate current status of our 401k plan and highlight any areas needing attention; administers OPCA retirement plan(s) through regular communication with staff, updates to employee accounts and ongoing work with Third Party Administrator/Investment Vehicle/Financial Advisor, to ensure accuracy of information and a quality benefit program for all OPCA employees.
- In partnership with the Human Resources Manager, annually reviews employee compensation and benefit offerings.

#### **Operations:**

- In partnership with operation and program staff members, reviews, analyzes, develops, and implements OPCA Plans, Policies and Procedures, including everything from the Employee Handbook to Standard Operating Procedures covering HR, Finance, and general operations.

- With OPCA leadership and internal operations team, contributes to the development, management, and evaluation of annual internal organizational goals to help OPCA continue to grow our internal operations, systems capacity, and overall efficiency.
- Acts as OPCA's Corporate Compliance Officer. Maintains accurate and up to date business liability and workers compensation insurance, as well as monitors and responds to OPCA risk management and compliance needs.
- Ensures operational excellence by imbedding quality improvement infrastructure and methods in all operational and finance efforts. Partners with staff to emphasize operational effectiveness, efficiency, sustainability, customer service, and staff engagement.

### **3. Essential Strategic & Leadership Responsibilities (~30% of time)**

- Applies OPCA's defined Equity Lens in all work
- Supervises three to four staff, with an emphasis on supporting team collaboration and individual mentorship and success. Hires, coaches, and counsels direct employees based on established policies and procedures.
- Serves as a member of the OPCA Executive Team and an Executive Sponsor of select OPCA committees, as identified.
- Participates in and presents at Board of Director and Board Committee meetings as appropriate, including staffing the Finance Committee of the Board.
- Develops annual initiative budget, manages resources for program area, and provides budgetary guidance for additional department initiative budgets.
- Travels to represent OPCA at relevant conferences and meetings in order to maintain knowledge of landscape, build partnerships and promote brand awareness.

### **4. Other Duties and Responsibilities (~10% of time)**

- Conducts individual administrative duties (e.g. scheduling, time sheets, internal organization communications, etc.)
- Other operational duties as needed.

### **5. Knowledge, Skills, and Abilities**

- Demonstrated proficiency, knowledge, and application of knowledge in non-profit financials and accounting.
- Demonstrated knowledge and application of knowledge in Human Resources including personnel management and relevant HR laws, regulations, and best practices.
- Experience and knowledge in change management (strategic planning, implementation, communication).
- Demonstrated competency in analyzing and interpreting organizational data to support accuracy, quality assurance, and improvement.
- Federal grant compliance and accounting experience
- Federally Qualified Health Center (FQHC) knowledge.
- Strong computer skills, including thorough knowledge of Word, Excel, Power Point, etc.
- Ability to lead and manage multiple complex projects simultaneously.
- Knowledge, skill and ability to establish and maintain effective working relationships with a diverse variety of people, personalities, lived experiences and opinions.
- Excellent communication skills, both informal and formal communications, including listening, speaking, writing and facilitation of discussions where diverse opinions exist.

- Ability to think strategically and deliver technically.
- Ability to self-direct with a high degree of organization.
- Effectively represent OPCA in a wide variety of settings.

#### 6. Minimum Qualifications and Experience

- Expert business knowledge with comprehensive understanding of the organization and functional area(s). Generally requires a Master's degree and/or 12+ years' experience; seven years management responsibility. Extensive knowledge of the field with advanced leadership skills.
- Fluency in written and spoken English required.
- Must be bondable

#### 7. Preferred Qualifications and Experience

- Experience with change management and operational innovation, implementation, and maintenance.
- Professional financial degree; CPA.
- Experience with MIP accounting software, DrillPoint report writing, pivot tables in Excel.
- Professional HR degree, certification or training.
- Understands or gains understanding of the public health approach to community health.

#### 8. Specific Job Attributes

- **Job Complexity:** As an expert in the field, uses professional concepts in developing resolution to critical issues and broad design matters. Conducts highly complex and important work critical to the organization. Develops guidelines, processes, and procedures for multiple functional areas through directors/managers on their team. Responsible for resource allocation, including budget and personnel. Makes strategic decisions based on company goals and objectives.
- **Impact:** Responsible for work critical to the organization and its members. Failure to achieve goals will have critical impact on the success of the organization and possibly its members.
- **Degree of Work Direction & Project Management:** This level acts as the second-level executive to the top executive within a major functional area. Works largely without supervision. Exercises latitude in determining objectives and approaches to critical assignments. Makes decisions based on company and functional objectives and allocated resources.
- **Responsibilities as a Team Member:** Works closely with the Board of Directors and company leadership in the implementation and evaluation of organizational goals and strategic plans.
- **Internal & External Contacts & Communication:** Creates formal networks with key decision makers and will serve as external spokesperson for the organization and the Executive Director in their absence. Recognized as an influential leader.
- **Leadership & Supervision of Others:** Manages the work efforts of senior leaders and others. Responsible for hiring, firing, performance appraisals, and pay reviews. Makes decisions based on company and strategic objectives and allocated resources.
- **Innovation & Quality Improvement:** Leads improvement in functional area(s). Influences and aligns CHC leaders, partners and other key stakeholders behind implementing

innovative programs to improve health center and/or OPCA value. Builds partnerships to support innovation and improvement.

- **Responsibility for Administrative Work:** Responsible for project management of individual work, including monitoring and responding to deadlines, scheduling internal and external meetings, preparing agendas and tracking action items to advance projects, distributing relevant communications, and managing personal administrative needs, such as travel planning and expense reimbursement reports. May seek administrative support for team and program needs from program specialists and coordinators, based on needs and priorities of the organization and availability of team resources.
- **Budgetary & Fiscal Responsibility:** Responsible for developing and managing initiative budget. Responsible for following financial policies and procedures for any organizational expenditures, purchases or reimbursements. Participates in strategic needs assessment and planning for organization budget management and projection.

#### 9. Travel Required

- In and out-of-state travel may be required for this position. If using a vehicle for work related travel, must possess valid Oregon driver license, provide proof of insurance and annual Motor Vehicle Record if using own vehicle, or be insurable if renting. Must be able to drive a motor vehicle safely and use a seat belt when in operation. Mileage and travel expenses are reimbursed per OPCA policy.

#### 10. Work Environment

- OPCA is a team-oriented organization; a tight-knit group of professionals committed to both the mission and to enjoying their jobs. Respectful interpersonal relationships, a fun team dynamic, and a passion for advancing the cause of community health clinics are equally critical components of the work environment.
- As a subject matter expert, employees are expected to partner as needed for communications & marketing needs to develop messages, objectives and/or communications tools to reach OPCA's members and other target audiences.
- Duties may be performed in both an office setting and out in Community Health Clinics.

#### 11. Physical Demands

- The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions. While performing the duties of this job, the employee is regularly required to sit behind and use a computer, talk, hear, and be able to operate general office equipment. This individual is also required to stand, walk, and reach during events.

**Statement of OPCA Practices:** OPCA is committed to continuous internal quality improvement practices. We work in a fast moving, ever changing environment in which management and staff strive to create constantly improving quality. OPCA is a smoke free, drug free workplace. We are an equal opportunity employer. We do not discriminate on the basis of race, religion, color, gender, age, sexual orientation, national origin or disability. OPCA expects employees to be culturally competent, with the ability to interact positively with people who do not look like, talk like, think like, believe like, act like, and live like they do.

**General Statement:** Oregon Primary Care Association (OPCA) is a private, 501(c)(3)-membership organization of Oregon’s “safety-net” primary care providers. Our mission is to lead the transformation of primary care to achieve health equity for all. Our membership primarily includes the federally qualified Community Health Centers (CHCs) and Look-Alikes as well as Rural Health Clinics, Indian Health Centers, and community clinics with similar missions and governance.

**REQUIRED SIGNATURES**

I acknowledge that I have reviewed the above job description and understand my job responsibilities and requirements.

Employee \_\_\_\_\_ Date \_\_\_\_\_

Supervisor \_\_\_\_\_ Date \_\_\_\_\_

***\*Job description changes must go through the HR Manager for review and the Finance & Operations Senior Director for approval.***