



Operations & Finance Senior Director

Position Description

Position:	Operations & Finance Senior Director	Date:	11.02.18
Reports To:	Executive Director	FLSA Status:	Exempt
Supervision:	Senior Accountant, HR Generalist, Office Coordinator & Scheduler	Pay Type:	Salary
Hours:	1.0 FTE		

Approved By: Joan Watson-Patko, Executive Director

_____ Date _____

1. Primary Purpose

The Operations and Finance Senior Director works closely with the Executive Director to lead, manage, maintain, and improve upon internal system functionalities including internal organizational development goals, human resources, compliance, budgeting, financial strategy, office-wide information technology (IT), and overall office management. This positions works closely with the entire OPCA staff to create an effective and efficient organization with an organizational culture that is aligned with OPCA values.

2. Essential Duties and Responsibilities (~60% of time)

Operations: Manages, implements, and improves OPCA’s operational support efforts in order to ensure operational excellence:

- In partnership with the HR Generalist and various staff members, this position 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.
- Works in tandem with the Office Coordinator and Scheduler to ensure OPCA’s day-to day office and administrative function, as well as larger scale projects such as office moves, are running smoothly and efficiently. Partners with OPCA staff and members of the Executive Team to plan for monthly all staff meetings.
- Acts as OPCA’s Corporate Compliance Officer and manages the committee. 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.

- Managers multiple vendor contracts and relationships. Regularly reviews the value and cost of business with each vendor, determining if we need to find a new vendor or eliminate the use of a vendor as a whole.
- Ensures operational excellence by imbedding quality improvement infrastructure and methods in all operational efforts. Partners with staff to emphasize operational effectiveness, efficiency, sustainability, customer service, and staff engagement.

HR

- In partnership with the Human Resources Generalist, leads the general management of key internal HR processes, including but not limited to: compensation and benefits; payroll accuracy; workers compensation; staff engagement; supervisor coaching and employee corrective action; and policies and procedures, ensuring alignment with OPCA mission, values, and philosophy.
- In partnership with HR Generalist, leads quarterly Manager of People Meetings to support and enhance information sharing among supervisors with direct reports.

Finance

- In partnership with OPCA leadership and Senior Accountant, oversee and direct spending strategy within fiscal year as well as provide support for ongoing fundraising strategy through relevant and timely projections
- Works with the Senior Accountant and Executive Director to direct the overall organizational budgeting process for consistency and accuracy; facilitates updates to budgeting system with an eye toward ease of use for managers and general staff, ensuring the system is robust yet streamlined for accuracy and efficiency; works with Senior Accountant to provide accurate and timely financial information to Managers of Budgets and Executive Team to allow for open communication regarding changes, adjustments and spend down needs;
- Co-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 Senior Accountant and program leads on budget development.
- 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 highlights 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.

IT

- Manages the overall office IT plan and strategy, making recommendations to leadership to ensure that OPCA's staff may be highly effective at their jobs; works collaboratively with leadership + staff to ensure an efficiently functioning, forward thinking technological work environment; oversees IT systems that enable OPCA to function and communicate both internally and externally on a daily basis by working with both internal staff and IT technical experts/contractors to meet organizational needs; plans future improvements.

- Works in partnership with outsourced IT vendor to manage IT needs of organization from "as needed" troubleshooting more complex items such as network maintenance, ensuring IT meets industry standards; works with OPCA staff, vendors, and contractors when considering the purchase of computer hardware, virtual meeting technology, etc.; provides technical support and training for staff using the network.
- Works collaboratively with OPCA employees and contractors to ensure OPCA's website is technically up-to-date, assisting with full implementation as needed. Provides the technical knowledge and oversees implementation once the messaging has been finalized.

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

- Supervises three to four staff, with an emphasis on supporting team collaboration and individual mentorship and success.
- 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.
- Travel 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 competency, knowledge, and application of knowledge in Human Resources including personnel management and relevant HR laws, regulations and best practices.
- Demonstrated proficiency, knowledge, and application of knowledge in non-profit financials.
- General network IT knowledge with strong computer skills, including thorough knowledge of Word, Excel, Power Point, etc.
- Experience and knowledge in change management (strategic planning, implementation, communication).
- Demonstrated competency in analyzing and interpreting organizational data to support quality assurance and improvement.
- Ability to make timely decisions and moves work forward.
- Ability to lead and manage multiple complex projects simultaneously.
- Knowledge, skill, and experience working with diverse populations and partner organizations.
- Ability to work with people who think, act, look, and/or live in a manner different from one's self.
- Knowledge, skill and ability to establish and maintain effective working relationships with a wide variety of personalities and organizations.

- Excellent written/oral 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.

7. Preferred Qualifications and Experience

- Experience with change management and operational innovation, implementation, and maintenance.
- Professional HR degree, certification or training
- Professional Financial 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. Participate 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 _____

****Changes must go through HR Generalist for standardization and Operations & Finance Director for review.***