

EFFECTIVE DATE: January 1, 2023

REVISION DATE: October 10, 2022

POSITION TITLE: Controller

FLSA CODE: Exempt

EEO CLASSIFICATION: Executive/Senior Level Officials and Managers



JOB OBJECTIONS/PURPOSE STATEMENT

Serves in the role of a Controller providing leadership and coordination of the Association’s financial operations. Manages a broad scope of cash and accrual-basis accounting activities, including financial audits, general ledger, budgeting, financial statement preparation and analysis, accounts payable, payroll, cash management, regulatory reporting, pension, and post-retirement healthcare accounting.

ESSENTIAL FUNCTIONS

1. Oversees and manages the daily operations of the Accounting Department.
2. Establishes and implements departmental goals, objectives, policies, and operating procedures. Trains, supervises and evaluates Accounting staff. Establishes, implements, and continually updates a system of financial internal controls.
3. Directs and coordinates preparation of the annual financial budget including providing guidance and support to the OEA management team members. Monitors and analyzes monthly operating results against budget. Recommends benchmarks for measuring the financial and operating performance of the Association including divisions and departments.
4. Oversees the preparation and review of monthly financial statements in accordance with generally accepted accounting principles. Reports financial results to senior management monthly. Oversees preparation and submission of federally required documents required of labor unions and non-profit organizations.
5. Directs and coordinates numerous financial audits and provide recommendations for procedural improvements.
6. Assists the Assistant Executive Director – Business Services (Chief Financial Officer) in aligning OEA’s financial operations with its strategic direction.
7. Provides financial information and guidance to the Association including staff, management, and local Association leaders.
8. Assists the OEA Secretary-Treasurer in an overall effort to improve the use of best business practices by local associations.
9. Manages special projects and other assignments, including the use of cross-divisional work groups.

QUALIFICATIONS (PURPOSE SPECIFICATIONS)

Education, Experience and Training:

Bachelor’s degree in accounting or business administration, CPA or MBA preferred, or equivalent business experience, and seven plus (7+) years of progressively responsible financial experience.

Required Knowledge, Skills, Ability:

- **Economics and Accounting** - Knowledge of economic and accounting principles and practices, the financial markets, banking and the analysis and reporting of financial data.
- **Administration and Management** - Knowledge of business and management principles involved in strategic planning, resource allocation, cash flow modeling, leadership technique, and coordination of people and resources.
- **Critical Thinking** - Using logic and reasoning to identify the strengths and weaknesses of alternative solutions, conclusions or approaches to problems.

- **Management of Financial Resources** - Monitoring and analyzing expenditures against approved budget and strategic priorities.
- **Deductive Reasoning** - The ability to apply general rules to specific problems to produce answers that make sense.
- **Oral Comprehension** - The ability to listen to and understand information and ideas presented through spoken words and sentences.
- **Written and Oral Communication** – The ability to communicate information and ideas orally or in writing so that others understand.
- **Technology Skills** – Skill in implementing, analyzing, and using accounting software, payroll applications, customer relationship management systems, spreadsheets, databases, etc., in order to efficiently manage, extract, analyze, and present financial information.
- **Insurance** – General knowledge and understanding of insurance programs including property, liability, and cyber.

Physical Requirements:

Ability to maintain physical condition and stamina appropriate to the performance of assigned duties and responsibilities which may include sitting for extended periods of time and operating assigned office equipment, and other duties as assigned. This position is a high-level staff position whose primary duty consists of the performance of office work directly related to the management of OEA and is not a production position.

AUTHORITY AND RELATIONSHIPS

This position reports to the Assistant Executive Director – Business Services (Chief Financial Officer). Directly supervises and evaluates assigned Associate staff.