Our Mission
To safely and responsibly collect and treat wastewater, and to recover resources from process waste streams, while protecting human health and improving the environment in a way that benefits the Tri-Cities and all USD stakeholders.

THE OPPORTUNITY
The Business Services Manager/Chief Financial Officer (CFO) is the working title for this position. Reporting to the General Manager, the Business Services Manager/Chief Financial Officer (CFO) manages the Business Services Work Group, including the development and implementation of work group and team goals, objectives, and priorities for each service area; and manages the District-wide administrative functions of finance, budgeting, accounting, internal audit, investments, and financial analyses; centralized purchasing, central stores, and inventory control; safety and risk management; training and organizational performance. Although the Human Resources Manager position resides within this workgroup, this position works directly with the General Manager to strategically manage the District’s Human Resources Program. The workgroup has 17 full-time positions.

The CFO works directly with the General Manager, Board of Directors, and Executive Team to develop, implement, and manage District financing plans set forth by policy, ordinance, and Board approval.

This position manages all accounting and finance functions, including but not limited to financial reporting, short- and long-range economic forecasts and analyses, budgets, management of unfunded liabilities, revenue, cash flow, audits, investment management, contracts, and long-term debt issuance, and rate setting.

USD’S SERVICE AREA
Union Sanitary District serves the cities of Fremont, Newark, and Union City in the San Francisco Bay Area - a total population of over 350,000. The Tri-Cities are located in the San Francisco East Bay, centrally located between the metropolitan areas of Oakland/San Francisco and San Jose/Silicon Valley. Highways 680 and 880 are major freeway arteries through the area, while transit commuters are served by three existing Bay Area Rapid Transit (BART) stations in Union City and Fremont with a planned expansion to the San Jose area. The area boasts a culturally diverse population and attracts many industries, including advanced manufacturing, clean tech, and life sciences. Some of the area’s largest employers include Tesla, Logitech, Western Digital, LAM Research and Seagate. The Tri-Cities are within 30 miles of the world-renowned higher education institutions of Stanford and UC Berkeley, and residents enjoy nearby amenities such as popular city parks, the East Bay Regional Park system, and Don Edwards San Francisco Bay National Wildlife Refuge. Celebrated for its entrepreneurship and natural beauty, the Bay Area is enhanced by a rich commercial, retail, cultural, intellectual, artistic, and neighborhood atmosphere. In addition to professional ballet, symphony, opera, and theater, the Bay Area has outstanding restaurants, museums, healthcare, schools, universities, and teams from all professional sports leagues.

THE ORGANIZATION
The Union Sanitary District (USD) is an innovative independent special district formed in 1918 providing wastewater collection, treatment, and disposal services. USD has an excellent reputation in the Bay Area, and in the broader wastewater industry as being a well-run, stable organization that balances innovation and creativity with sound business practices and conservative values.

USD is governed by a five-member Board of Directors elected from the Tri-cities. USD’s service area is 60.2 square miles. USD is responsible for operating and maintaining over $657 million worth of assets, which include a 33-acre treatment plant, seven pump stations, and 819 miles of conveyance pipelines. In 2016, the District treated an average dry weather flow of approximately 24 million gallons per day (MGD) and the plant has a total average dry weather capacity of 33 MGD. The District’s 2017 operational budget is approximately $37.4 million with a total budget of $65.1 million. The 20-year capital budget plan is currently forecasted at $600 million.

The District employs 137 staff and is organized into five work groups which include Treatment and Disposal Services; Collection Services; Fabrication, Maintenance, and Construction; Technical Services; and Business Services.

USD is a team-based organization and its teams embody the District’s commitment to collaboration. Professional, technical, and field operations employees are organized into teams led by a “Coach,” or front-line manager. Team members have input into key decisions that affect their daily work lives and often have decision-making authority over these issues, e.g., equipment purchases, training budgets, and work schedules.

All of USD’s teams strive to provide excellent customer service to both internal and external customers. Employees at all levels participate on task forces and committees to address District-wide issues, resulting in increased cooperation among different disciplines and greater appreciation for each other’s expertise.

Visit the Union Sanitary District website:
www.unionsanitary.com
In addition to the aforementioned experience and requirements, the District’s leadership has identified the following additional qualities as important criteria to be utilized in the selection process:

- Be skilled in addressing strategic, management, and organizational issues.
- Manage effectively in a team-based organization that values customer service, employee involvement, and continuous improvement.
- Be both a technical expert and an outstanding manager of people and other resources.
- Bring the values of honesty, stewardship, customer service, fiscal prudence, transparency, and a strong work ethic.
- Have a history of and demonstrated ability to make decisions on matters such as personnel issues, project alternatives, and budget expenditures.
- Practice clear, honest two-way communication and promote openness, mutual respect, and collaborative working relationships.
- Be committed to working in partnership with unions and promoting a collaborative labor-management relationship.
- Be an effective mentor and coach, and motivate and empower staff to achieve established goals.
- Communicate effectively with the Board of Directors, other governmental agencies, and the public.
- Possess excellent verbal, presentation, and written communication skills.
- Demonstrate commitment to the training and development of staff.
- Encourage initiative, creative problem-solving, innovation, and out-of-the-box thinking; exhibit adaptability when implementing change; share information to create improvements.
- Act as a trusted and confidential advisor to the General Manager.

THE IDEAL CANDIDATE

Ideal candidates will be well-rounded public finance professional with in-depth knowledge and experience in local government accounting and budgeting. Experience in special district finance is considered a plus. Exceptional verbal and written communication skills are essential for success in this role. Ideal candidates will be team-oriented managers who seek ways to mentor and grow their professional staff. While technical expertise is expected, the new CFO will possess exceptional interpersonal skills with the proven ability to effectively engage the District's numerous internal customers across departments. To be a good fit in this organization, department directors must be highly collaborative with other directors and within his/her own management team.

Education and Experience

- Must possess a Bachelor’s degree in finance, accounting, public or business administration, or a closely related field. A Master’s degree is desirable.
- Certification as a Certified Public Accountant (CPA) is highly desirable.
- Seven years’ increasingly responsible experience in public financing and accounting and a minimum of one of the functional areas managed by this position; exposure to two other functional areas is desired. Three years’ experience must have been in a supervisory or management capacity.

KEY RESPONSIBILITIES

The Chief Financial Officer will:

- Ensure compliance with regulatory and governmental accounting and financial reporting standards, including IRS, SCO, GASB, GAAP, PERS, ICMA and other legal requirements and principles of sound financial operations, good stewardship of public funds, and strategic objectives.
- Oversee preparation of O&M and CIP budgets and forecasting of cash flows for operating budget and capital expenditures and revenues; identify impacts on the District’s rate structure; oversee establishment of financial controls and review of expenditures; present budget recommendations to the Board of Directors for approval.
- Serve as District Treasurer; manage the District’s investments and portfolio, maximizing income and safety through daily and long-range investment policies; administer bond programs and secure tax-exempt and other financing; establish internal control systems and procedures to ensure audit compliance; annually review investment policies and recommend revisions as appropriate.
- Provide mentoring, guidance and oversight to the professional development of talented and motivated workgroup team members.
- Oversee general liability, property damage, vehicular physical damage, catastrophic insurance, loss recovery, and crime insurance programs.
- Manage the purchasing function and recommend changes to the District’s purchasing policy.
COMPENSATION & BENEFITS

The annual salary range is $175,945.67 to $230,928.70. Actual starting salary will depend on qualifications and experience.

The District offers a comprehensive and competitive benefits package including:

- CalPERS retirement 2.5% at 55 formula. (If new to CalPERS or not from an agency with reciprocity with CalPERS, the formula is 2% at 62 by pension reform law.)
- Medical, dental and vision insurance substantially paid for by the District for the employee and family.
- Deferred compensation matching up to $4,200 per year.
- Administrative leave of 64 hours per year, and vacation starting at two weeks per year.
- Retiree medical benefits up to $600 per month depending on years of service.
- Work schedule options are a standard 40-hour schedule or a 9/80 schedule.

APPLICATION AND SELECTION PROCESS

The recruitment is Open Until Filled. First review of applications received will be in mid-December with planned interviews in early January 2018.

To be considered, please submit your cover letter, résumé, and list of six professional references (who will not be contacted in the early stages of the recruitment). Your résumé should reflect size (staff/budget) and scope of recent responsibilities, as well as years and months of beginning/ending dates of positions held.

Please email resume and cover letter to: hr@unionsanitary.ca.gov

Résumés will be screened in relation to the criteria outlined in this brochure. The District will select a small number of candidates whose experience is deemed to most closely match the ideal candidate profile to compete as finalists. Interviews with finalists are expected to occur in early January 2018 with possible appointment in mid-February 2018 following thorough reference and background checks. For additional information about this position please contact Gene Boucher at geneb@unionsanitary.ca.gov.