



**STATE OF OREGON
POSITION DESCRIPTION**

Position Revised Date:
5/22/24

Agency: Board of Accountancy

Facility: Salem

☐ New

☒ Revised

This position is:

☐ Classified

☐ Unclassified

☐ Executive Service

☒ Mgmt Svc – Supervisory

☐ Mgmt Svc – Managerial

☐ Mgmt Svc - Confidential

SECTION 1. POSITION INFORMATION

a. Classification Title: Business & Ops Supervisor 2

b. Classification No: 7086

c. Effective Date: 07/01/2024

d. Position No: 0000003

e. Working Title: Deputy Director

f. Agency No: 12000

g. Section Title: _____

h. Budget Auth No: 73458

i. Employee Name: _____

j. Repr. Code: MMS

k. Work Location (City – County): Salem - Marion

l. Supervisor Name: Martin Pittioni, Executive Director

m. Position: ☒ Permanent

☐ Seasonal

☐ Limited Duration

☐ Academic Year

☒ Full-Time

☐ Part-Time

☐ Intermittent

☐ Job Share

n. FLSA: ☒ Exempt
☐ Non-Exempt

If Exempt: ☒ Executive
☐ Professional
☐ Administrative

o. Eligible for Overtime: ☐ Yes
☒ No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

The Board of Accountancy (Board) is responsible for the licensing and regulation of about 9,500 certified public accountants (CPAs), public accountants (PAs), municipal auditors and about 1,000 public accounting firms. The Board is established and operates by authority of ORS 673.010 to 673.475, ORS 297.670 to 297.740 and OAR chapter 801. Funding of the agency is 100% Other Funds primarily from licensing fees to support 7.0 FTE with a biennial budget authorization of about \$3 million.

The Board's mission is to protect Oregon consumers by ensuring only qualified licensees practice public accountancy in accordance with established professional standards and promulgated rules. The Board of Accountancy protects the public by issuing licenses to individuals who have demonstrated achievement of professional competencies and by assuring that all licensees maintain professional competence. The Board also protects the public by investigating complaint allegations against licensees and enforcing disciplinary sanctions when appropriate.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

The primary purpose of this position is to carry out and lead all aspects of the business operations of the Board of Accountancy (Board), and to assume all of the Executive Director position duties in the absence of the Executive Director. This position is integral to achieving the Board's goal to free up the Executive Director position to focus on community outreach, tending to the external relationships with the Board's stakeholders and function as an engaged, pro-active regulator.

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

| % of Time | N/R/NC | E/NE | DUTIES |
|------------------|---------------|-------------|---|
| 50 | | E | <p>Business Operations</p> <p>This position carries primary responsibility for carrying out the business operations of the Board. In that capacity this position liaises with the Department of Administrative Services (DAS) other state agencies and boards of accountancy, and the National Association of State Boards of Accountancy (NASBA) on administrative, business, policy and other matters and special projects.</p> <p>Serve as the Deputy Director and first in the line of succession to the Executive Director (Director). During the Director's absence or vacancy, assumes duties assigned to the Director including designated signature and appointing authority.</p> <p>Act as the primary advisor to the Director, directs the Board's licensing team, and coordinates licensing operations with the Board's compliance team. Operationalize all of Governor's priorities and directives within the Board office including but not limited to the Continuity of Operations Plan, Succession Plan, 360 Review Implementation, and adherence to recruitment deadlines.</p> <p>Formulate, determine, evaluate and authorize activities of the Board in accordance with the strategic and DEI plans and align policy, program priorities and utilization of resources with Board goals.</p> <p>Evaluate, propose and implement Board-approved policies by considering all relevant factors, assessing the impact on service to the public, licensees, applicants for licensure and the profession's work force pipeline. and determine the resources necessary to implement the policies as efficiently and effectively as possible.</p> <p>Assist the Director with resolution of major policy issues through analysis, negotiation with external constituents, implementation of policies and/or procedures, and allocation of resources to resolve issues.</p> |

| | | | |
|----|--|---|--|
| | | | <p>Provide supervision, leadership and direction to the licensing team. Coach and support staff and provide Director with regular feedback on individual and program performance. Complete quarterly check ins for subordinate staff, provide staff with notices of inadequate performance, take disciplinary actions as necessary, provide individual development plan coaching.</p> <p>Set standards and direct communication and training of staff to reinforce agency service delivery standards.</p> <p>Administer and report Key Performance Measures (KPMs) for the Board, including proposing new, or modifications to KPMs and establish and evaluate internal key performance indicators.</p> <p>Act as Board communications lead including through agency's web site and social media outlets. Represent the Board in communication of policy and directives of the Board to licensees, local and national industry, and the public.</p> |
| 35 | | E | <p><u>BUDGET AND FINANCIAL OPERATIONS AND ADMINISTRATION</u></p> <p>This position is responsible for the proper establishment of internal controls including the preparation and execution of the Board's biennial budget and other financial administration. Assist the Director with preparation and presentation of the Board's biennial and interim budget information to the Governor, Department of Administrative Services-CFO, Legislative Fiscal Office and Legislature.</p> <p>Continually evaluate Board priorities and operational execution for impact, risk, and effectiveness Change scope of operations, and develop and implement policy changes as needed to meet the Board's mission and Board-approved strategic plan.</p> <p>Sponsor and oversee high impact and high-cost Board technology investments, including upgrading or replacing Licensing management software.</p> <p>Execute the Board's procurement activities and develop procedures for contract management. Execute Board contracts and inter-Agency agreements.</p> <p>Oversee Board committee operations, vacancy recruitment and continual updates and adherence to committee manual and policies.</p> <p>Oversee the Board's compliance with public accounting firm peer review oversight as established by ORS 673.455/457 and Division 50 of the Board's rules. Oversee Peer Review Oversight Committee operations.</p> |
| 10 | | E | <p><u>LEGISLATIVE, RULE AND STATUTORY RESPONSIBILITIES</u></p> |

| | | | |
|------|--|---|---|
| | | | <p>Assist Director with interpreting, developing, and the implementation of legislation, rules and policies as directed by the Board and ensure agency operations are in compliance with its regulatory framework.</p> <p>Assist Director as assigned with legislative and rules communication ensuring a highly transparent and collaborative process accessible to external partners, staff and the general public. Manage and direct the Board's Laws and Rules Committee. Act as the Agency's primary Rule Coordinator and represent the Agency as assigned externally.</p> |
| 5 | | E | Perform other duties as assigned by the Real Estate Commissioner or by the Governor. |
| 100% | | | |

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Frequent heavy workload and/or deadline pressures; must maintain confidentiality of information/documentation; changing statutes, policies, rules and employee contracts; decreasing staffing levels. Frequent long work hours due to rules and legislative work and assigned special projects, etc. Occasional overnight and weekend travel to attend/speak at licensee functions, attend national NASBA conferences and other meetings which benefit licensees, the public, and staff. May work with hostile customers.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

Dept. of Administrative Services Dept. policies and rules regarding personnel, budgeting, purchasing, data processing, accounting, property control, etc.; Secretary of State audit and archivist statutes and rules; Board of Accountancy policy, procedure and desk reference manuals; Board of Accountancy licensing statutes and rules (ORS 673.010 to 673.475, ORS 297.670 to 297.740 and OAR chapter 801).

b. How are these guidelines used?

Guidelines are used daily to provide accurate information and in providing proper decisions to Agency staff as well as licensees and the public to achieve protection for Oregon consumers of public accounting services. Knowledge of these guidelines is essential to managing the Board of Accountancy while managing Agency risk exposure and protecting the public consumer.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

| Who Contacted | How | Purpose | How Often? |
|--|---|--|---------------------------------|
| Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter". | | | |
| General public, other state agencies, federal agencies, vendors, professional organizations | Telephone, in person, via email, videoconference and in writing | Answer inquiries on Agency policies and procedures and the requirements of statutes and rules administered by the Agency | On a continuous and daily basis |
| Oregon State Legislature: Legislators & Staff, Legislative Fiscal Office | " | " | " |
| Oregon Governor's Office | " | " | " |
| Board members of the Board of Accountancy | " | " | " |
| Department of Administrative Services – EIS, CHRO, CFO, RISK, other various divisions | " | " | " |
| Oregon Department of Justice | " | " | " |
| NASBA staff | " | " | " |
| Licensees | " | " | " |
| Attorneys | " | " | " |
| Board Staff | " | " | " |
| Other Government Agencies (Fed. & State) | " | " | " |
| Associations including OASCPA, AICPA, OAIA | " | " | " |
| Local, Regional and National Public Accounting Firm | " | " | " |
| Accounting Educators and higher education representatives | " | " | " |
| Vendors | " | " | " |

Contacts vary in frequency.

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

The Deputy Director acts as the primary agency administrator for the benefit of Oregon consumers and is required to exercise independent judgment and make numerous discretionary decisions on a day-to-day basis. Decision making errors can result in loss of agency credibility, misappropriation of agency resources, legal action against the agency and the State of Oregon, incorrect licensing of regulated parties and poor working relationships within and outside of the state.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

| Classification Title | Position Number | How | How Often | Purpose of Review |
|--|-----------------|--------------------------|-----------|--|
| Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter". | | | | |
| Executive Director | | In person and in writing | Ongoing | General supervision and work is monitored by results, feedback from licensees, Agency staff, the public and other Agency contacts. |

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

- a. How many employees are directly supervised by this position? 4
- How many employees are supervised through a subordinate supervisor? 0
- b. Which of the following activities does this position do?
- | | |
|---|--|
| <input checked="" type="checkbox"/> Plan work | <input checked="" type="checkbox"/> Coordinates schedules |
| <input checked="" type="checkbox"/> Assigns work | <input checked="" type="checkbox"/> Hires and discharges |
| <input checked="" type="checkbox"/> Approves work | <input checked="" type="checkbox"/> Recommends hiring |
| <input checked="" type="checkbox"/> Responds to grievances | <input checked="" type="checkbox"/> Gives input for performance evaluations |
| <input checked="" type="checkbox"/> Disciplines and rewards | <input checked="" type="checkbox"/> Prepares & signs performance evaluations |

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

Requires extensive knowledge of the principles and practices of management, including planning, organizing, directing, motivating, controlling and decision making, specialized knowledge of information systems concepts, techniques, and practices; skill in planning, organizing and controlling the use of human, equipment and budgetary resources to achieve Agency goals and objectives, skills and knowledge in state budgeting, human resources, labor relations, business services and other statewide systems, policies and procedures; ability to administer a day to day regulations and enforcement process statewide; knowledge of state laws governing programs administered by the Board of Accountancy and ability to interpret and apply such laws and administrative rules; and other requirements prescribed by the Executive Director.

Requires exceptional ability to communicate both orally and in writing.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

| Operating Area | Biennial Amount (\$00000.00) | Fund Type |
|----------------|------------------------------|-----------|
|----------------|------------------------------|-----------|

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

| | | |
|------------|-------------|-------|
| Agencywide | \$3 million | Other |
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |

SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature

Date

Supervisor Signature

Date

Amber DANIELS

Appointing Authority Signature

6/13/2024

Date