CFO Onboarding & Development

December 11, 2019

City Charter Granted by State of California in 1850 (City & County)

Fourth largest city in California, 13th in the U.S.

Geography: ~49 square miles

Economic & Cultural Center of San Francisco Bay Area

Population of 883,305 (U.S. Census 2018 Estimated)

Assessed value of property in the City was $281B in 2019

Largest departments are: Public Health, Airport, Municipal Transportation, Public Utilities Commission, Homelessness & Supportive Housing, Human Services Agency, Police Department, Fire Department, Public Works

Over 35K employees including 6,900 DPH, 5,500 MTA, 3,200 Police, 1,700 Fire and 1,700 PUC. Controller Office, 250+ funded positions

FY 2019-20 Budget = $12.3 Billion
Office of the Controller Overview

Who We Are:
The Controller's Office works to ensure the City's financial integrity and to promote efficient, effective, and accountable government. We strive to be a model for good government and to make the City a better place to live and work.

What We Do:
The Controller serves as the chief accounting officer and auditor for the City and County of San Francisco. The Controller’s Office is responsible for governance and conduct of key aspects of the City’s financial operations, including operating the City’s financial, procurement, HR & payroll systems, maintaining the City’s internal control environment, processing citywide payroll, managing the City’s bonds and debt portfolio, and processing and monitoring the City’s budget. The department produces regular reports and audits on the City’s financial and economic condition and the operations and performance of City government.

City & County of SF – A Place to Grow & Develop

50+ Departments, covering City & County services
- Largest, Public Health, $2.4B, 6,886 FTEs
- Smallest, Board of Appeals, $1.2M, 5 FTEs

Established Policies, Procedures & Networks

Innovative, Inclusive Culture

Advancement Opportunities
CFO Onboarding & Development
- One-on-One Sessions over first 6-12 Months
- CFO Connections – Our Network Building, Advisor Program

Calendars & Tools
- Year-at-a-Glance Financials, Procurement, Learning
- Recurring Daily, Weekly, Monthly, Quarterly To Do’s
- Business Intelligence Reporting
  - One-Click Sightline
  - 40+ Financial, Procurement, People & Pay Dashboards

CFO Lunch Programs & Networking – Bi-monthly

Quarterly Advisory Boards, including SF Reports & Analytics for...
- SF Financials
- SF Procurement
- SF People & Pay
- SF Learning

City & County of SF – CFO Onboarding Sessions
1) Budget Cycle, the SF Budget System
2) Accounting Policies, Procedures, the SF Financials System
3) Purchasing, the SF Procurement System
4) HR, Timekeeping, Payroll, the SF People & Pay System
5) Learning Management, the SF Learning System
6) Business Intelligence & SF Reports & Analytics Dashboards
7) Compliance Audits
8) Performance Audits
9) Cybersecurity & Data Security Requirements
10) Emergency Response & Recover
11) Capital Planning
12) Capital Finance, Bond Funding
13) Technology Planning & Procurements
Accountant Intern Program
Established to help All Departments with a talent pipeline for Accounting jobs.
Run by the Controller’s Office with a Citywide Steering Committee, DHR support.
Endorsed by the Union.

Program Structure
15-25 New Interns hired each year.
Trained over 18 months in a paid internship with mentoring.
Two 9-month rotations, generally at two different departments.

Intern Mentors and Supervisors
Interns assigned a Mentor and Supervisor(s) to guide and train them.
May be multiple Supervisors during a rotation, depending on topic/department.
Covers comprehensive, quality training in core governmental accounting.

Training Workshops
Workshops to build their technical competencies and develop understanding.
Covers Purchasing and Accounting procedures, processes, and policies.

Minimum Qualifications
B.A. with 18 semester units or 24 quarter units of coursework in Accounting.
Succession Preparedness, Retention & Resilience
- Support Developmental Growth Opportunities
  - Special Projects, Stretch Assignments
  - Cross Training, Skill Building within Work Teams
- Mindful of Key Person, Single Subject Matter Expert Risks
- Support Alternate Work Schedule & Telework Programs

Inclusion, Diversity, Equity & Belonging, with new initiatives including:
- De-identification of Applicant Pools - No Names, No Schools…
- Inclusion, Equity & Implicit Bias Training for Hiring Managers
- Gender Inclusion Policy, Non-Binary Option & Chosen Name
- New Office of Racial Equity at our Human Rights Commission
- New Departmental Racial Equity Leaders
- New Departmental Racial Equity Action Plan Reporting
- New Annual Reporting – All EEs, Applicant Pools & New Hires

Thank you.

Questions?

More info?

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