**At LattaHarris, LLP our mission is:**

* To provide the highest quality professional services possible by a certified public accounting firm. These services include tax, accounting, auditing, information technology, business and financial consulting
* To utilize the full extent of our abilities to help our clients achieve their goals
* To provide the optimal environment to help our personnel reach their maximum professional potential and personal fulfillment
* To continue the growth of our practice at a rate that provides continual opportunity for advancement by firm personnel and facilitates constant quality improvement
* To always be mindful of the people, efforts and relationships that have made the firm what it is today

**Position Purpose**

The Director of Operations is responsible for ensuring the efficient operation of the day-to-day activities of the firm, including strategic planning, finance, accounting and collections, office and facilities maintenance, information technology and human resources.

As a managerial role, the Director of Operations directly manages all administrative personnel.

**Position Reports To**

Managing Partner

**Position Responsibilities**

* *Strategic Planning*
* Attends all scheduled partner meetings, calls and retreats, barring vacation or illness
* Coordinates strategic planning meetings, including scheduling meetings and preparing agendas
* Implements operational objectives for our firm outlined in the strategic plan and ensures that they are met each year, gaining the input of the principals, overcoming challenges, and problem solving to keep the firm evolving into a better and more efficient firm each year
* *Human Resources*
* Maintains the job descriptions for HR personnel to ensure they are current and relevant
* Supervises the Human Resources Manager, once hired
* Ensures that the initiatives of the Human Resources Department are consistent with the goals of the firm
* Oversees the management of workloads firmwide, making recommendations for assignment or re-assignment of client engagements and administrative projects; reports to the partner group on a weekly basis regarding the same
* Coordinates staff budgets (people and hours) with firm budget
* Works with the Human Resources Manager to review and make recommendations regarding the compensation of personnel, giving due consideration to consistency throughout the firm and staying current with market compensation
* *Finance and Accounting*
* Maintains the job description(s) for the administrative personnel to ensure they are current and relevant and supervises the administrative personnel
* Prepares the firm budget for approval by the Executive Committee after input from the partners
* Oversees monthly/quarterly payroll and sales taxes and files annual taxes
* Supervises all accounting functions, including invoicing/billing, accounts payable processing, collection calls, and processing deposits
* Establishes and maintains a system of internal accounting control designed to reasonably protect the firm’s assets and insure integrity of its financial reporting system
* Oversees time and billing system and ensures timely billing of clients
* Supervises the preparation of financial reports and conducts financial analysis as requested
* *Administration*
* Organizes and directs the day-to-day operations of the firm and supervises and directs the administrative staff
* Works with the administrative team to standardize office procedures, systems and forms and implement revisions as necessary
* Oversees the research and acquisition of necessary office equipment, computers and software
* Manages associated vendor relationships
* Directs the implementation of firm policies and recommends improvements
* Supervises the secure and efficient maintenance of client and firm work files
* *Facilities*
* Maintains building lease paperwork and manages other facilities issues as needed, including recommending revisions or renovations as necessary
* Develops and maintains a facility plan for each office with due consideration to appearance, utility and cost consistency throughout the firm
	+ *Risk Management*
* Working with the Managing Partner:
	+ Ensures office security
	+ Renews the firm’s insurance policies
	+ Implements employee confidentiality and non-solicitation agreements
	+ Implements and maintains a firm-wide disaster recovery plan
	+ Implements and maintains client acceptance procedures
	+ Implements standardized engagement letters for each type of service the firm delivers and ensures they are utilized consistently throughout the firm
* Ensures compliance with the requirements for all licenses and memberships
	+ *Information Technology*
* Maintains the job description(s) for IT personnel to ensure they are current and relevant
* Manages the IT Director
* Oversees the development and implementation of an annual IT strategic plan for the firm

**Skills and Education Required**

* College degree in management, accounting or human resources
* A minimum of 10 years of managerial experience that includes the supervision of financial, administrative and human resources functions
* Working knowledge of a variety of software applications including Word, Outlook, and Excel
* Strong organizational skills and ability to work independently and prioritize activities
* Team player and positive attitude
* Willingness to work a minimum of 2,300 hours per year
* Capable and willing to travel between LattaHarris, LLP office locations as needed
* Ability to uphold and exemplify the firm values, including providing a work environment that promotes respect and teamwork
* Experience writing and implementing strategic plans and proven project management experience is preferred
* CPA certificate or MBA a plus

**Measures of Success**

In the first 24 months in the role, the Director of Operations will be deemed to have been successful when he or she has:

* Hired a Manager of Human Resources and established measures of success for the role
* Established a system of internal accounting controls
* Overseen the successful implementation new tax and practice management software programs
* Developed a strategic planning process using internal or external resources
* Presented a strategic plan to the principals