

# Council Business Meeting

August 4, 2020

<b>Agenda Item</b>	Adoption of the Selection Criteria to be used by the City Council when interviewing Finalists for Finance Director	
<b>From</b>	Tina Gray	Human Resource Director
<b>Contact</b>	<a href="mailto:tina.gray@ashland.or.us">tina.gray@ashland.or.us</a> ; (541) 522-2101	

## **SUMMARY**

During the [June 16, 2020 Business Meeting](#), Council asked staff to continue with the recruitment for Finance Director. Due to COVID-19 restrictions, all the screening steps so far in the selection process have been electronic reserving the final vetting for the City Council.

The Council will be meeting in a closed session to interview the finalists, so staff is recommending the Council formally adopt the selection criteria that will be used during the interview and selection process to ensure transparency with the community. A survey was posted on the City's website to solicit public input. A summary of the community input on the Finance Director recruitment has been provided to the Council, and it has been incorporated into the draft selection criteria.

All the finalists who will be interviewed by the Council have met the minimum qualifications outlined in the recruitment brochure. The Council will determine which candidate most closely matches our candidate profile during the interview and selection process. Staff has supplied draft selection criteria for Council consideration.

## **POLICIES, PLANS & GOALS SUPPORTED**

N/A

## **PREVIOUS COUNCIL ACTION**

Council provided staff direction to continue with the Recruitment and Selection of a Finance Director at their [June 16, 2020 Business Meeting](#).

## **BACKGROUND AND ADDITIONAL INFORMATION**

The position of Finance Director has remained unfilled since the resignation of Mark Welch effective May 31, 2019. While serving as City Administrator, Kelly Madding took on the added role of Finance Director to try and achieve some budget savings by leaving the Finance Director vacant as long as possible. After Kelly's departure in April 2020, Council appointed Bryn Morrison as Interim Finance Director while the City searched for a new Finance Director to lead the upcoming biennial Budget Process. The application deadline for Finance Director was Friday, June 6, 2020. The City received 36 total applications and through several screening steps has narrowed down to three semi-finalists.

### **Screening steps so far include:**

- Review of applications based on minimum job qualifications as outlined in the job announcement resulting in a short-list of 14 candidates.
- Written questionnaire response
- Phone interview with finance staff
- Zoom interviews with two panels consisting of a mix of elected officials, appointed staff, Budget Committee members, and outside finance professionals.

The last step in the selection process is an interview with the City Council in Executive Session.

## **FISCAL IMPACTS**

Funding for the position of Finance Director was appropriated in the 2019-2021 Adopted Budget. The City opted not to replace the Finance Director to gain budget savings by leaving the position vacant. In Fiscal Year 2020, funding for the position was \$210,117 and for Fiscal Year 2021, funding for the position is \$215,936. October of 2019, the Council approved a five percent out-of-class pay increase for Kelly Madding while performing duties as Finance Director. The added pay amounted to \$701.17/month or \$4,908 during the seven months Kelly received the added pay. Since April, Bryn Morrison has also received an incremental increase for assuming the role of Interim Finance Director. As of June, the incremental increase has totaled \$6,157. Of the \$215,936 budgeted for Finance Director FY 2019/20, the City has realized a savings of \$204,000. As the position won't be replaced until the end of the summer, cost savings will continue until the vacancy is filled by a new Finance Director. (The budget savings for this position is all realized in Central Services, along with savings by having the Assistant City Administrator serve as Interim City Administrator without replacing the Assistant City Administrator).

## **STAFF RECOMMENDATION**

Staff is recommending that Council formally adopt the selection criteria they will be using to evaluate finalists for Finance Director. Each of the finalists meets the minimum requirements for the job, the selection criteria are designed to guide the Council in selecting the most qualified candidate who will be the best match for Ashland. Once approved, staff will develop an objective scoring matrix based on the adopted selection criteria.

## **ACTIONS, OPTIONS & POTENTIAL MOTIONS**

1. I move to adopt the selection criteria as presented by staff to be used when interviewing finalists for the position of Finance Director.
2. I move to amend the selection criteria as presented by staff...

## **REFERENCES & ATTACHMENTS**

Attachment 1: Recruitment Brochure

Attachment 2: Summary of Responses from the Community re: Finance Director Recruitment

Attachment 3: Draft Selection Criteria

CAREER OPPORTUNITY



# FINANCE DIRECTOR CITY OF ASHLAND, OREGON

\$103,312–\$138,613 DOE/DOQ

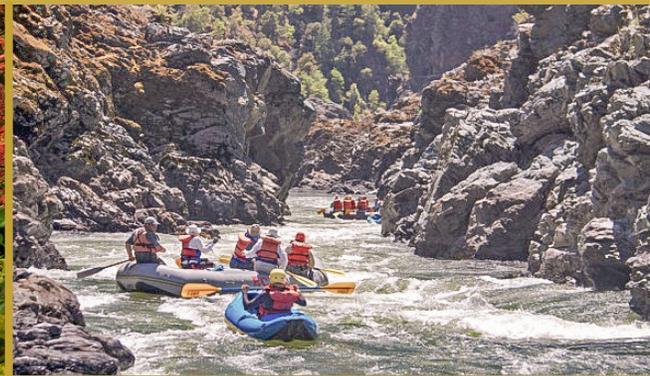
**T**HE CITY OF ASHLAND SEEKS A FINANCE DIRECTOR who has organizational leadership, financial acumen, strategic business thinking, and effective leadership and communication skills. In this role you will be the City Administrator's strategic financial partner, lead a staff of 15 and play a leading role in supporting the great work the City of Ashland provides its citizens.





# CITY OF ASHLAND A GREAT PLACE TO WORK, LIVE & PLAY

**T**HE CITY OF ASHLAND is located in Southern Oregon, which is known for the Oregon Shakespeare Festival, Southern Oregon University, sustainable practices, Lithia Park, a wonderful climate and a host of outdoor activities including rafting, skiing, boating, fishing, camping, and more. The City of Ashland offers magnificent landscapes, rich culture, world-class theaters and an excellent public school system. For the fourth year, Ashland High School was awarded *US News & World Report's* Silver Medal as one of the best high schools in America. The "Heart of Ashland" is its world-class parks and recreation system which includes 93-acre Lithia Park, designed by John McLaren of Golden Gate Park fame. The park attracts more than one million visitors a year.



# ASHLAND CITY ADMINISTRATION



**INCORPORATED IN 1874**, the City of Ashland operates under its own charter and applicable state laws. Ashland's population is slightly more than 20,000. The City provides a full range of municipal services, including police and fire protection, ambulance services, parks and recreation facilities/activities, streets, airport, planning and building, senior programs and general administrative services. The City also provides water, wastewater, electric and telecommunications utility services. The City has approximately 260 employees, a diverse revenue base, and a biennial budget of \$253 million ([CLICK HERE TO REVIEW THE 2019-21 BIENNIUM BUDGET](#)).

Currently, Ashland operates under a Council-Administrator form of government. This may change as a measure is before the electorate in May 2020 to change the form of government to that of Council-Manager. The City government is led by a mayor who is directly elected to a four-year term and a six-member City Council whose members are elected at-large to four-year, overlapping terms. Other elected officials are the City Recorder, Municipal Judge and the five-member Parks & Recreation Commission. Much of the City's business evolves through over 20 advisory boards and commissions that enhance public support and political stability. The Mayor, with confirmation by the City Council, appoints the City Administrator and all the department heads, whose appointments are recommended by the City Administrator.

## THE JOB

**THE FINANCE DIRECTOR** will lead a staff of 15, oversee the Finance Department budget of \$16 million, and support the great work the City of Ashland provides its citizens in other departments. In addition to overseeing the Finance, Accounting and Customer Service Divisions in the department, this position may manage special projects, policy and programs, and other divisions and departments as assigned. This position is at-will and is part of the executive team. The incumbent will assist the City Administrator with overseeing the City's central services, strategic plans, and coordinate the financial framework all city departments. The City of Ashland has a Citizens' Budget Committee with which the Finance Director will work closely. This Committee is comprised of 14 members including the City Council, Mayor and seven appointed citizen members.

The City of Ashland has a highly engaged citizenry that is interested in City finances. The Finance Director will serve as the primary conduit for financial information moving from the organization into the public sphere.

### UPCOMING PROJECTS, CHALLENGES & OPPORTUNITIES:

- ⇒ Develop a long-term financial stabilization plan
- ⇒ Facilitate and analyze major public improvement project financing
- ⇒ Expand on existing financial technology solutions
- ⇒ Incorporate the City's Climate Energy Action Plan into the financial and operational culture of the organization
- ⇒ Update and modernize the City's purchasing and procurement program
- ⇒ Evaluate financial policies and update City codes

# THE IDEAL CANDIDATE .....

**THE CITY OF ASHLAND SEEKS** a Finance Director who has organizational leadership, financial acumen, strategic business thinking, and effective leadership and communication skills. Our ideal candidate enjoys working closely and collaboratively with staff and department heads, excels at budget development and forecasting, appreciates the culture of the community and has solid debt servicing, bond market and investment experience.

## THE IDEAL CANDIDATE WILL BE ABLE TO:

### FINANCIAL ACUMEN

- ⇒ Provide fiscal oversight and accountability of a \$253 million budget.
- ⇒ Serve as the primary resource for the City's financial planning and management.
- ⇒ Analyze and develop long-term financing for the City's operational and capital needs.
- ⇒ Provide financial analysis for the City Administrator, executive team, and Budget Committee.
- ⇒ Oversee budget development, revenue forecasting, grants and loans.
- ⇒ Provide recommendations on issues that impact financial, auditing and investment operations.
- ⇒ Monitor and assess changes in laws and regulations impacting accounting and treasury practices.
- ⇒ Have knowledge of government accounting financial principles and practices (**GASB**).
- ⇒ Oversee utility billing and tax collection.
- ⇒ Operate with a strong ethical framework and uphold public trust.

### LEADERSHIP & COMMUNICATION

- ⇒ Inspire a transparent, inclusive and empowering culture.
- ⇒ Lead with confidence and assurance, work well with the community, and perform well under pressure.
- ⇒ Support and oversee the work of others and supply staff opportunities for professional growth.
- ⇒ Foster interdepartmental teamwork and collaboration.
- ⇒ Successfully negotiate internal and external communication with strong and divergent personalities.
- ⇒ Engage and motivate staff.
- ⇒ Oversee staff and organizational performance.
- ⇒ Demonstrate excellent communication and people skills at all levels of an organization.
- ⇒ Enjoy public communications and present well in public hearings and presentations.
- ⇒ Manage employee relations effectively.





## BUSINESS ACUMEN & TECHNOLOGY

- ⇒ Understand political challenges and use business savvy to navigate appropriately.
- ⇒ Be a big picture, organizational and administrative problem-solver.
- ⇒ Use interpersonal skills to build trust and develop relationships.
- ⇒ Embrace change, and successfully manage priorities.
- ⇒ Keep up with new business technology to provide best practice recommendations.
- ⇒ Ensure the organization's technology, accounting, database systems and programs are functional and relevant.
- ⇒ Possess the ability to combine experience, knowledge, perspective, and awareness to make sound decisions.
- ⇒ Collaborate and make knowledge sharing a priority.
- ⇒ Plan in a creative and innovative way, while incorporating the functionality provided through the City's existing financial technology tools such as OpenGov, Munis and other related technology solutions.

## BACKGROUND & EDUCATION

- ⇒ Bachelor's degree in public and/or business administration, finance, accounting, or related field.
  - ⇒ Progressively responsible experience in upper-level management.
  - ⇒ Public sector accounting/financial management experience.
  - ⇒ Combination of experience and training demonstrating the knowledge, skills and abilities needed to perform the duties of the position.
  - ⇒ Possession of or ability to obtain a valid Oregon driver's license.
  - ⇒ Master's degree in public/business administration or related field, working knowledge of Oregon budget law, and financial management experience in a municipal government that is similar to or larger than the city of Ashland is desirable.
- 

# SALARY & BENEFITS

**SALARY: \$103,312–\$138,613 DOE/DOQ** and an attractive benefits package including: Medical, dental and vision benefits, an automobile allowance, a generous retirement plan through the State of Oregon, a deferred compensation program, an HRA VEBA account, life insurance, paid leave and other competitive benefits.



# HOW TO APPLY

Apply by **JUNE 5** for first consideration at:  
**[wbcpinc.com/job-board](http://wbcpinc.com/job-board)**

Mark your calendar for these Important Dates: **June 29 & 30**  
(Interviews tentative due to COVID-19)

**Questions?** Contact Tina Gray at: **541.552.2101** or **[Tina.Gray@ashland.or.us](mailto:Tina.Gray@ashland.or.us)**



# Finance Director Recruitment

July 21, 2020, 8:41 AM

## Contents

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iii.	Individual responses	5

## Summary Of Responses

<b>As of July 21, 2020, 8:41 AM, this forum had:</b>	<b>Topic Start</b>
Attendees: 93	July 6, 2020, 8:47 AM
Responses: 47	
Hours of Public Comment: 2.4	

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### QUESTION 1

**Please rank in order of preference the following preferred skills and qualifications for the new Finance Director. Click each option for more details.**

1. Long-Term Financial Planning Experience
2. Effective Management
3. Strategic Business Practices
4. Debt Servicing, Bond Market, and Investment Experience

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### QUESTION 2

**Are there any skills and qualifications not listed above or in the recruitment brochure (link in the introduction) that you would like to see considered for the interviews?**

Answered	34
Skipped	13

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### QUESTION 3

**Please rank in order of preference the following preferred attributes that you would like to see the new Finance Director possess. Click each option for more details.**

1. Strong Ethical Thinking
2. Community and Public Engagement
3. Social Equity
4. Technological Savvy
5. Environmental Focused
6. Political Perception

## Finance Director Recruitment

Finance Director Recruitment

### QUESTION 4

**Are there any attributes not listed above or in the recruitment brochure (link in the introduction) that you would like to see considered for the interviews?**

Answered	27
Skipped	20

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## Survey Questions

### QUESTION 1

**Please rank in order of preference the following preferred skills and qualifications for the new Finance Director. Click each option for more details.**

- Effective Management
- Debt Servicing, Bond Market, and Investment Experience
- Long-Term Financial Planning Experience
- Strategic Business Practices

### QUESTION 2

**Are there any skills and qualifications not listed above or in the recruitment brochure (link in the introduction) that you would like to see considered for the interviews?**

### QUESTION 3

**Please rank in order of preference the following preferred attributes that you would like to see the new Finance Director possess. Click each option for more details.**

- Community and Public Engagement
- Environmental Focused
- Political Perception
- Social Equity
- Strong Ethical Thinking
- Technological Savvy

### QUESTION 4

**Are there any attributes not listed above or in the recruitment brochure (link in the introduction) that you would like to see considered for the interviews?**

## Individual Responses

**Name not available**

July 6, 2020, 9:08 AM

**Question 1**

- 1. Long-Term Financial Planning Experience
- 2. Strategic Business Practices

**Question 2**

No response

**Question 3**

- 1. Strong Ethical Thinking

**Question 4**

This hiring decision should be postponed until next year and left to the new city manager. Let the new city manager choose his or her team.

- 1. Long-Term Financial Planning Experience
- 2. Debt Servicing, Bond Market, and Investment Experience
- 3. Strategic Business Practices
- 4. Effective Management

**Question 2**

No - but the explanations for "Debt Servicing" and "Long-Term Financial Planning" are the same, so that's not very helpful. I'm also not sure what "strategic business practices" means - it would have been helpful to have a more in-depth explanation of all of these items.

**Question 3**

- 1. Community and Public Engagement
- 2. Political Perception
- 3. Strong Ethical Thinking
- 4. Social Equity
- 5. Environmental Focused
- 6. Technological Savvy

**Question 4**

We need someone who can be creative about ways to save money - to do things more cheaply, perhaps by leveraging the extensive volunteer forces in this town. We need someone who won't say "yes" to all spending proposals but will analyze data and talk to other cities who have done or proposed a similar project. We need someone who can say "no", and someone who really values public input, not just giving lip service to it.

inside Ashland

July 6, 2020, 7:44 PM

**Question 1**

- 1. Long-Term Financial Planning Experience

**Question 2**

Turn around experient

**Question 3**

- 1. Strong Ethical Thinking

**Question 4**

Payroll expense control - reduce overhead of senior manager positions. Maintain line staff and first responders

**Name not available**

inside Ashland

July 7, 2020, 5:19 AM

**Question 1**

- 1. Long-Term Financial Planning Experience
- 2. Effective Management
- 3. Debt Servicing, Bond Market, and Investment Experience
- 4. Strategic Business Practices

**Question 2**

Works well with others.

**Question 3**

**Name not available**

July 7, 2020, 12:02 AM

**Question 1**

## Finance Director Recruitment

### Finance Director Recruitment

1. Strong Ethical Thinking
2. Community and Public Engagement
3. Technological Savvy
4. Social Equity

#### Question 4

No response

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#### Name not shown

inside Ashland

July 7, 2020, 5:53 AM

#### Question 1

1. Effective Management
2. Long-Term Financial Planning Experience
3. Debt Servicing, Bond Market, and Investment Experience
4. Strategic Business Practices

#### Question 2

Understands and invest in matters of equity, diversity and inclusion.

#### Question 3

1. Strong Ethical Thinking
2. Social Equity
3. Environmental Focused
4. Community and Public Engagement
5. Technological Savvy
6. Political Perception

#### Question 4

No response

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#### Name not available

July 7, 2020, 6:20 AM

#### Question 1

1. Debt Servicing, Bond Market, and Investment Experience
2. Effective Management
3. Long-Term Financial Planning Experience
4. Strategic Business Practices

#### Question 2

No response

#### Question 3

1. Strong Ethical Thinking
2. Environmental Focused
3. Community and Public Engagement
4. Technological Savvy
5. Political Perception
6. Social Equity

#### Question 4

No response

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inside Ashland

July 7, 2020, 6:39 AM

#### Question 1

1. Long-Term Financial Planning Experience

#### Question 2

experience with leaner management team=more efficient use of taxpayer money.

#### Question 3

1. Community and Public Engagement

#### Question 4

honest communication with the citizenry about all financial issues, and the decisions needed to make, for the future of our Ashland.

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inside Ashland

July 7, 2020, 7:11 AM

#### Question 1

1. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

## Finance Director Recruitment

Finance Director Recruitment

No response

### Question 3

1. Technological Savvy

### Question 4

No response

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### Name not available

July 7, 2020, 7:33 AM

### Question 1

1. Effective Management
2. Strategic Business Practices
3. Long-Term Financial Planning Experience
4. Debt Servicing, Bond Market, and Investment Experience

### Question 2

None

### Question 3

1. Strong Ethical Thinking
2. Political Perception
3. Community and Public Engagement
4. Social Equity
5. Technological Savvy

### Question 4

A thick skin will help.

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### Name not shown

inside Ashland

July 7, 2020, 7:42 AM

### Question 1

1. Long-Term Financial Planning Experience
2. Effective Management
3. Debt Servicing, Bond Market, and Investment Experience
4. Strategic Business Practices

### Question 2

NA

### Question 3

1. Community and Public Engagement
2. Strong Ethical Thinking
3. Technological Savvy
4. Social Equity
5. Political Perception
6. Environmental Focused

### Question 4

None

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inside Ashland

July 7, 2020, 7:44 AM

### Question 1

1. Strategic Business Practices
2. Long-Term Financial Planning Experience
3. Effective Management

### Question 2

Extensive experience in contracting for municipal services and various other alternatives to having permanent stall positions.

### Question 3

1. Political Perception
2. Social Equity
3. Environmental Focused
4. Community and Public Engagement
5. Strong Ethical Thinking

### Question 4

Public works project management experience.

---

inside Ashland

July 7, 2020, 7:47 AM

### Question 1

## Finance Director Recruitment

### Finance Director Recruitment

1. Long-Term Financial Planning Experience
2. Strategic Business Practices
3. Effective Management
4. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

People skills, listening skills, flexibility and adaptability in the face of unforeseen developments.

#### Question 3

1. Environmental Focused
2. Social Equity
3. Political Perception
4. Technological Savvy
5. Strong Ethical Thinking
6. Community and Public Engagement

#### Question 4

No

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### Name not available

July 7, 2020, 7:49 AM

#### Question 1

1. Strategic Business Practices
2. Effective Management
3. Long-Term Financial Planning Experience
4. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

Anti racist understanding/work, work with homeless populations, equity work

#### Question 3

1. Social Equity
2. Environmental Focused
3. Strong Ethical Thinking
4. Community and Public Engagement
5. Political Perception
6. Technological Savvy

#### Question 4

See above

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### Name not available

July 7, 2020, 8:01 AM

#### Question 1

1. Effective Management
2. Long-Term Financial Planning Experience

#### Question 2

Make sure they have financial and business education and not related to anyone currently working for the City of Ashland.

#### Question 3

1. Strong Ethical Thinking
2. Technological Savvy
3. Community and Public Engagement
4. Environmental Focused

#### Question 4

Political preference and social equity has nothing to do with the qualities of a financial manager, its business not voting.

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### Name not available

July 7, 2020, 8:22 AM

#### Question 1

1. Long-Term Financial Planning Experience
2. Debt Servicing, Bond Market, and Investment Experience
3. Effective Management
4. Strategic Business Practices

#### Question 2

No response

#### Question 3

1. Strong Ethical Thinking
2. Community and Public Engagement
3. Social Equity
4. Political Perception
5. Technological Savvy

## Finance Director Recruitment

### Finance Director Recruitment

6. Environmental Focused

#### Question 4

No response

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#### Name not shown

inside Ashland

July 7, 2020, 8:30 AM

#### Question 1

1. Long-Term Financial Planning Experience
2. Debt Servicing, Bond Market, and Investment Experience
3. Effective Management
4. Strategic Business Practices

#### Question 2

Honesty, integrity, excellent communication skills.

#### Question 3

1. Strong Ethical Thinking
2. Community and Public Engagement
3. Social Equity

#### Question 4

No response

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#### Name not available

July 7, 2020, 8:39 AM

#### Question 1

1. Long-Term Financial Planning Experience
2. Effective Management
3. Strategic Business Practices
4. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

No response

#### Question 3

1. Technological Savvy

2. Community and Public Engagement

3. Strong Ethical Thinking

4. Environmental Focused

5. Social Equity

6. Political Perception

#### Question 4

I don't understand the term Political Perception above.

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#### Name not shown

inside Ashland

July 7, 2020, 8:49 AM

#### Question 1

1. Long-Term Financial Planning Experience
2. Debt Servicing, Bond Market, and Investment Experience
3. Strategic Business Practices
4. Effective Management

#### Question 2

No response

#### Question 3

1. Technological Savvy
2. Political Perception
3. Strong Ethical Thinking
4. Social Equity
5. Community and Public Engagement
6. Environmental Focused

#### Question 4

No response

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#### Name not available

July 7, 2020, 8:51 AM

#### Question 1

1. Effective Management
2. Long-Term Financial Planning Experience
3. Strategic Business Practices
4. Debt Servicing, Bond Market, and Investment Experience

## Finance Director Recruitment

### Finance Director Recruitment

#### Question 2

No response

#### Question 3

1. Strong Ethical Thinking
2. Social Equity
3. Environmental Focused
4. Community and Public Engagement
5. Political Perception
6. Technological Savvy

#### Question 4

No response

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### Name not available

July 7, 2020, 8:52 AM

#### Question 1

1. Long-Term Financial Planning Experience
2. Strategic Business Practices

#### Question 2

No response

#### Question 3

1. Technological Savvy
2. Political Perception
3. Community and Public Engagement

#### Question 4

No response

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inside Ashland

July 7, 2020, 9:15 AM

#### Question 1

1. Strategic Business Practices
2. Effective Management
3. Long-Term Financial Planning Experience

4. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

The ability to educate the community, in simple language, in the current and future financial state of the City. We need someone who can communicate clearly and often on the strategic plan for our town's financial future. This means using examples that the public can understand and teaching our community how to use OpenGov and comprehend our budget.

#### Question 3

1. Community and Public Engagement
2. Strong Ethical Thinking
3. Technological Savvy
4. Social Equity
5. Environmental Focused
6. Political Perception

#### Question 4

This person needs to be "balanced" in terms of their financial side and their people connection side. We need someone who people can clearly trust and respect. They need to be a very clear communicator. They need to be creative, strategic, hard-working, down to earth, and kind. A sense of humor too! We need a financial leader who is dedicated to helping Ashland and not afraid to face the public's concerns.

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### Name not available

July 7, 2020, 9:25 AM

#### Question 1

1. Long-Term Financial Planning Experience
2. Effective Management
3. Debt Servicing, Bond Market, and Investment Experience
4. Strategic Business Practices

#### Question 2

Yes, must be able to make unpopular decisions that will result in the financial sustainability of the city. This needs to be the primary goal of the finance director.

#### Question 3

1. Strong Ethical Thinking
2. Community and Public Engagement

## Finance Director Recruitment

### Finance Director Recruitment

3. Social Equity
4. Environmental Focused
5. Technological Savvy
6. Political Perception

#### Question 4

No response

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#### Name not available

July 7, 2020, 9:34 AM

#### Question 1

1. Strategic Business Practices

#### Question 2

Communications with interested citizens

#### Question 3

1. Strong Ethical Thinking

#### Question 4

No response

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#### Name not shown

inside Ashland

July 7, 2020, 9:47 AM

#### Question 1

1. Effective Management

#### Question 2

Prior expertise to be able to integrate the city's CEAP plan into every financial aspect of how the city operates into the future. Create new systems, new paradigm for sustainability as it relates to climate and finances. An openness to develop innovative ways with a new economy and ability to integrate the current pandemic, future pandemics, earthquakes and smokey realities we need to learn how to be prepared for. We need a numbers person who is willing and able to think and act outside the box.

#### Question 3

1. Strong Ethical Thinking

#### Question 4

All of the above are critical attributes. It was difficult to pick one.

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#### Name not shown

inside Ashland

July 7, 2020, 9:58 AM

#### Question 1

1. Effective Management

#### Question 2

Crisis management of a budget.

High people skill quotient.

Experience in municipal budgeting for a town the size of Ashland.

Excellent listening skills.

Education: MBA and CPA at least and evidence of consistent continuing education.

#### Question 3

1. Community and Public Engagement

#### Question 4

Can he or she say "no" to staff who want to spend more than revenue justifies?

Evidence that he or she can communicate even negative information to elected officials and stand by it.

Can he or she "speak truth to power" like telling elected officials that they need to lay off staff?

Evidence of being able to engage and listen to volunteers like those on the Citizen Budget Committee.

Willingness to educate the public to controversial budgeting.

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inside Ashland

July 7, 2020, 2:21 PM

#### Question 1

1. Strategic Business Practices
2. Long-Term Financial Planning Experience
3. Debt Servicing, Bond Market, and Investment Experience
4. Effective Management

#### Question 2

## Finance Director Recruitment

### Finance Director Recruitment

We believe the Number 1 qualification would be the ability to make limited funds stretch farther and to prioritize expenditures in a shrinking economy.

#### Question 3

1. Community and Public Engagement
2. Strong Ethical Thinking
3. Technological Savvy
4. Environmental Focused
5. Political Perception
6. Social Equity

#### Question 4

We'd want to know if the candidate would tolerate "hiding" or "recharacterizing" funds or their sources so as to mislead the public on what funds were being used for what purposes. This is based on our perception that past administrations have "creatively reallocated" or "re-characterized" expenditures or their sources to obscure the true cost of services being approved by the City Council. In short, we'd like to see more candor and transparency in the budgetary process and public financing.

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#### Name not shown

inside Ashland

July 7, 2020, 2:25 PM

#### Question 1

1. Long-Term Financial Planning Experience
2. Effective Management
3. Strategic Business Practices
4. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

Ability to confront difficult situations and propose (and advocate for) difficult solutions. E.G. administrative layoffs required to compensate for reduced revenue.

#### Question 3

1. Strong Ethical Thinking
2. Social Equity
3. Environmental Focused
4. Community and Public Engagement
5. Political Perception
6. Technological Savvy

#### Question 4

No response

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#### Name not available

July 7, 2020, 2:30 PM

#### Question 1

1. Effective Management
2. Debt Servicing, Bond Market, and Investment Experience
3. Strategic Business Practices
4. Long-Term Financial Planning Experience

#### Question 2

A redneck ultra conservative republican (just kidding) This person should be non-partisan and a open minded listener.

#### Question 3

1. Community and Public Engagement
2. Strong Ethical Thinking
3. Political Perception
4. Technological Savvy
5. Environmental Focused
6. Social Equity

#### Question 4

None I can think of at this moment.

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#### Name not available

July 7, 2020, 6:11 PM

#### Question 1

1. Strategic Business Practices
2. Effective Management

#### Question 2

Please get someone that is not afraid or timid to cut salaries and remove personnel from the budget. Cut cut cut. And more cuts please

#### Question 3

1. Strong Ethical Thinking

## Finance Director Recruitment

### Finance Director Recruitment

#### Question 4

No response

#### Name not available

inside Ashland

July 7, 2020, 6:45 PM

#### Question 1

1. Long-Term Financial Planning Experience
2. Strategic Business Practices
3. Debt Servicing, Bond Market, and Investment Experience
4. Effective Management

#### Question 2

Ashland has a top-heavy administrative structure. To make matters worse, it's common to outsource big project planning/decisions to external entities for big bucks. Please hire someone who has the skills to do this job, so we don't have to (once again) pay an external consultant to give us advice that our own staff is somehow unqualified to do.

#### Question 3

1. Strong Ethical Thinking
2. Technological Savvy
3. Political Perception
4. Environmental Focused
5. Social Equity
6. Community and Public Engagement

#### Question 4

Intelligence. Excellent communication skills.

#### Name not available

outside Ashland

July 7, 2020, 7:49 PM

#### Question 1

1. Long-Term Financial Planning Experience
2. Strategic Business Practices
3. Debt Servicing, Bond Market, and Investment Experience
4. Effective Management

#### Question 2

A focus on serving the desires of the citizens. It is our money being used.

A clear look at the tendency to fund improvements or maintenance through seemingly arbitrary tax increases without citizen buy-in.

#### Question 3

1. Community and Public Engagement
2. Environmental Focused
3. Strong Ethical Thinking
4. Social Equity
5. Political Perception
6. Technological Savvy

#### Question 4

A dedication to not spending beyond our means.

#### Name not available

July 7, 2020, 10:10 PM

#### Question 1

1. Effective Management
2. Long-Term Financial Planning Experience
3. Debt Servicing, Bond Market, and Investment Experience
4. Strategic Business Practices

#### Question 2

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#### Question 3

1. Strong Ethical Thinking
2. Social Equity
3. Environmental Focused
4. Community and Public Engagement
5. Technological Savvy
6. Political Perception

#### Question 4

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#### Name not available

July 8, 2020, 8:55 AM

## Finance Director Recruitment

### Finance Director Recruitment

#### Question 1

1. Long-Term Financial Planning Experience
2. Effective Management
3. Strategic Business Practices
4. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

No response

#### Question 3

1. Strong Ethical Thinking
2. Technological Savvy
3. Social Equity
4. Community and Public Engagement
5. Environmental Focused
6. Political Perception

#### Question 4

No response

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### Name not available

July 8, 2020, 2:50 PM

#### Question 1

1. Effective Management
2. Long-Term Financial Planning Experience
3. Strategic Business Practices
4. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

No response

#### Question 3

1. Strong Ethical Thinking
2. Social Equity
3. Technological Savvy
4. Political Perception
5. Community and Public Engagement
6. Environmental Focused

#### Question 4

No response

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### Name not available

July 8, 2020, 2:57 PM

#### Question 1

1. Debt Servicing, Bond Market, and Investment Experience
2. Long-Term Financial Planning Experience
3. Strategic Business Practices
4. Effective Management

#### Question 2

Some one with real world Private sector experience (someone who comes from a fiscally responsible corporation) instead of hiring the same old government bureaucrat good ol' employee club member.

#### Question 3

1. Strong Ethical Thinking
2. Technological Savvy
3. Community and Public Engagement

#### Question 4

Clear and transparent communication with bottom line facts.

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inside Ashland

July 8, 2020, 3:43 PM

#### Question 1

1. Strategic Business Practices
2. Debt Servicing, Bond Market, and Investment Experience
3. Effective Management
4. Long-Term Financial Planning Experience

#### Question 2

Ability to listen to the myriad of opinions and ideas that citizens of Ashland put forth and to be able to educate the citizenry as to how government budgeting and finances work.

#### Question 3

1. Community and Public Engagement

## Finance Director Recruitment

### Finance Director Recruitment

2. Environmental Focused
3. Social Equity
4. Technological Savvy
5. Strong Ethical Thinking
6. Political Perception

#### Question 4

Since the recruitment brochure came out before CoVid19 hit, perhaps a question as to whether or not the candidate has contemplated the long term fiscal implications of the pandemic combined with climate change, and political protests. (Ie, how to develop resilience).

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inside Ashland  
July 8, 2020, 8:33 PM

#### Question 1

1. Strategic Business Practices
2. Long-Term Financial Planning Experience
3. Debt Servicing, Bond Market, and Investment Experience
4. Effective Management

#### Question 2

As the retired City Recorder/Treasurer I would recommend that the next finance director have extensive experience in Oregon Budget Law and have credentials from the Oregon Finance Officers Association.

Every state is different in regards to budget laws. If the city hires from any other state there will be a huge learning curve.

Hiring someone that has NO Oregon governmental finance/budget experience is not in the best interest of the city.

Oregon state budget law is unique and we must have someone who is experienced.

The city needs to get candidates who have the education and experience.

I support those that have worked themselves up through the trenches, but ONLY, if they have been provided and attended the available educational opportunities.

OMFOA (Oregon Municipal Finance Officers Association) offers continuous educational classes on a yearly basis, which then awards a Certificate for master of Finance Officers. This certificate takes no less than four years to achieve.

There is a lot that needs to be considered for our next Finance Director considering the salary that is provided for this position.

#### Question 3

1. Strong Ethical Thinking
2. Community and Public Engagement
3. Political Perception
4. Technological Savvy
5. Social Equity
6. Environmental Focused

#### Question 4

State of Oregon experience and education.

#### Name not shown

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inside Ashland  
July 8, 2020, 8:47 PM

#### Question 1

1. Long-Term Financial Planning Experience
2. Strategic Business Practices
3. Effective Management

#### Question 2

Skill at managing and eliminating deficit positions.

#### Question 3

1. Community and Public Engagement

#### Question 4

Courage to push back against the irresponsible financial management and policies of the City Counsel

#### Name not available

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inside Ashland  
July 9, 2020, 7:36 AM

#### Question 1

1. Strategic Business Practices
2. Long-Term Financial Planning Experience

## Finance Director Recruitment

### Finance Director Recruitment

3. Effective Management
4. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

No response

#### Question 3

1. Community and Public Engagement
2. Strong Ethical Thinking
3. Social Equity
4. Technological Savvy
5. Environmental Focused
6. Political Perception

#### Question 4

No response

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### Name not available

inside Ashland

July 9, 2020, 12:34 PM

#### Question 1

1. Long-Term Financial Planning Experience
2. Effective Management
3. Debt Servicing, Bond Market, and Investment Experience
4. Strategic Business Practices

#### Question 2

COSO Certification

#### Question 3

1. Strong Ethical Thinking
2. Community and Public Engagement
3. Social Equity
4. Environmental Focused
5. Political Perception
6. Technological Savvy

#### Question 4

No response

### Name not shown

inside Ashland

July 9, 2020, 2:04 PM

#### Question 1

1. Effective Management
2. Long-Term Financial Planning Experience
3. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

Demonstrated successful experience recruiting and empowering people of color for staff positions; demonstrated success in expanding the voices brought to the decision making table, especially to include underrepresented members of the community.

#### Question 3

1. Strong Ethical Thinking
2. Social Equity
3. Community and Public Engagement
4. Technological Savvy
5. Environmental Focused
6. Political Perception

#### Question 4

No response

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inside Ashland

July 9, 2020, 10:00 PM

#### Question 1

1. Long-Term Financial Planning Experience
2. Effective Management
3. Debt Servicing, Bond Market, and Investment Experience
4. Strategic Business Practices

#### Question 2

Experience or insight in effective ways to navigate unexpected financial crisis such as COVID-19.

#### Question 3

1. Strong Ethical Thinking

## Finance Director Recruitment

### Finance Director Recruitment

2. Social Equity
3. Environmental Focused
4. Community and Public Engagement
5. Technological Savvy
6. Political Perception

#### Question 4

A possible interview question.

"On May 16, 2017 the City Council and Mayor proclaimed the City of Ashland a City of Peace and joined the International Cities of Peace (<https://www.ashlandcpc.org/city-of-peace-proclamation>). Ashland has also supported the Ashland Culture of Peace Commission, is a member of the International Mayors for Peace, is home of Peace House, has installed the World Peace Flame Monument, and has a centuries old legacy of being a gathering place of peace for Native Americans.

As the Finance Director and a city thought leader, what creative actions will you take to support and advance Ashland as an evolving City of Peace?"

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inside Ashland  
July 10, 2020, 12:51 PM

#### Question 1

1. Long-Term Financial Planning Experience
2. Effective Management
3. Debt Servicing, Bond Market, and Investment Experience
4. Strategic Business Practices

#### Question 2

Someone that has experience cutting expenses in a municipal setting. Someone that has experience being under fire from many small constituencies.

#### Question 3

1. Political Perception
2. Strong Ethical Thinking
3. Community and Public Engagement
4. Technological Savvy
5. Environmental Focused
6. Social Equity

#### Question 4

Communication skills, written and verbal.  
Leadership skills  
Change agent

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#### Name not available

inside Ashland  
July 12, 2020, 6:00 PM

#### Question 1

1. Long-Term Financial Planning Experience
2. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

You haven't given a place to put this.... so I'll put it here.  
This person should be hired next year AFTER the City Manager is hired.  
.... and... by the City Manager. This is their employee.... right ??

#### Question 3

1. Strong Ethical Thinking

#### Question 4

Cost reduction: Specific departmental goals with target / measurement to target / impact to budget with phase-in.

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#### Name not available

July 13, 2020, 11:28 AM

#### Question 1

1. Strategic Business Practices
2. Long-Term Financial Planning Experience
3. Effective Management
4. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

No response

#### Question 3

1. Strong Ethical Thinking
2. Community and Public Engagement
3. Social Equity
4. Environmental Focused

## Finance Director Recruitment

### Finance Director Recruitment

5. Political Perception
6. Technological Savvy

#### Question 4

No response

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#### Name not available

July 13, 2020, 9:10 PM

#### Question 1

1. Long-Term Financial Planning Experience
2. Effective Management
3. Strategic Business Practices
4. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

No response

#### Question 3

1. Community and Public Engagement
2. Social Equity
3. Strong Ethical Thinking
4. Technological Savvy
5. Environmental Focused
6. Political Perception

#### Question 4

No response

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#### Name not available

July 18, 2020, 2:58 PM

#### Question 1

1. Strategic Business Practices
2. Long-Term Financial Planning Experience
3. Effective Management
4. Debt Servicing, Bond Market, and Investment Experience

#### Question 2

No

#### Question 3

1. Strong Ethical Thinking
2. Political Perception
3. Social Equity
4. Community and Public Engagement
5. Environmental Focused
6. Technological Savvy

#### Question 4

No

## **Selection Criteria for Finance Director:**

### **Ideal candidate – OVERALL**

- We are looking for an experienced professional with organizational leadership, financial acumen, strategic business thinking, and effective leadership and communication skills.
- Someone who enjoys working closely with staff, and is great with budget development, forecasting and ideally has solid investment experience.

**Financial:** The Finance Director will provide fiscal oversight and accountability of a \$253 million budget; serve as the primary resource for the City's financial planning and management; perform long-term financing for the City's operational and capital needs; provide financial analysis and oversee budget development, revenue forecasting, grants and loans; assist in overseeing the health benefits self-insurance program and provide recommendations on issues that impact financial, auditing and investment operations.

**Leadership and Communications:** provide support and professional growth for staff; promote interdepartmental teamwork and collaboration; engage and motivate staff; inspire a transparent, inclusive and empowering culture; lead with confidence and assurance; work well with elected officials, and perform well under pressure; demonstrate excellent communication; and present well in public and uphold public trust.

**Business Acumen and Technology:** provide improve business processes and develop approaches to doing business better; understand political challenges and use business savvy to navigate appropriately; be a big picture, organizational and administrative problem solver; use superior interpersonal skills to build trust and develop relationships; champion change, successfully manage priorities; and keep up with new business technology to provide best practice recommendations.

### **Ensure Alignment with Community Priorities:**

- Long-Term Financial Planning Experience
- Effective Management
- Strategic Business Practices
- Debt Servicing, Bond Market and Investment Experience
- Strong Ethical Thinking
- Community and Public Engagement
- Social Equity
- Technological Savvy
- Environmental Focus
- Political Perception