

Council Business Meeting

September 1, 2020

Agenda Item	Confirmation of Mayoral Appointment of Melanie Purcell as Finance Director	
From	Adam Hanks Tina Gray	Interim City Administrator Human Resource Director
Contact	adam.hanks@ashland.or.us ; (541) 552-2046 Tina.gray@ashland.or.us ; (541) 552-2101	

SUMMARY

After a lengthy recruitment and selection process that was hindered by travel and meeting restrictions due to COVID-19, staff and Council have narrowed in on a highly qualified candidate to be appointed as the City’s new Finance Director. Melanie Purcell will be relocating from Texas, and will start work later this month to ensure she will be involved with all phases of the City’s biennial budget process.

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, Regular Business Meeting](#). After panel interviews on August 28 and 29, staff returned to Council on August 4, 2020, with an update on the process and a request to accept Melanie Purcell as the only finalist for consideration.

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.

The application deadline for the Finance Director was Friday, June 6, 2020. The City received 36 total applications and successfully narrowed down to three semi-finalists through multiple screening steps. Screening steps in the selection process included:

- Review of applications based on minimum job qualifications as outlined in the Job Announcement resulting in a short-list of 14 candidates.
- Written Questionnaire
- Phone Interview with Finance Staff
- Zoom interviews (held on August 28 and 29) with two panels consisting of a mix of elected officials, appointed staff, Budget Committee members, and outside finance professionals.
- The City Council was supposed to interview the top two to three finalists in Executive Session as the final step. However, there was a unanimous agreement among panelists following the Zoom interviews that Melanie was the best candidate for the job.
- Because the process had extended much longer than usual, time was of the essence to have Melanie in place for the start of the Budget Process.

- Melanie visited Ashland and met with City Councilors and staff. At the end of her visit, she accepted the position.

FISCAL IMPACTS

The 2019-2021 adopted Budget included funding for the position of Finance Director. The City opted not to replace the Finance Director to gain budget savings through the vacancy. In Fiscal Year 2020, funding was \$210,117*, and for Fiscal Year 2021 funding is \$215,936. In October 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 compensation. Since April, Bryn Morrison has also received an incremental increase for assuming the role of Interim Finance Director. As of June, the additional was \$6,157.

Of the \$215,936 budgeted for Finance Director FY 2019/20, the City has realized a savings of \$204,000. Savings will continue until Melanie begins work in late September. The budget savings for this position is realized in Central Services, along with savings by having the Assistant City Administrator serve as Interim City Administrator without backfilling.

*Note – This figure represents the total cost to the City for the position, not the total compensation to the staff person filling the position.

STAFF RECOMMENDATION

Staff recommends the Council confirm the Mayor's appointment Melanie Purcell as Finance Director.

ACTIONS, OPTIONS & POTENTIAL MOTIONS

I move approval of the appointment of Melanie Purcell as Finance Director.

REFERENCES & ATTACHMENTS

Attachment 1: Employment Contract and Resume for Melanie Purcell

Attachment 2: Recruitment Brochure for Finance Director

Attachment 3: Melanie Purcell Resume

CITY OF ASHLAND EMPLOYMENT AGREEMENT

Director of Finance

THIS EMPLOYMENT AGREEMENT (“Agreement”), is made and entered into this 1st day of September, 2020, by and between the City of Ashland (“City”) and Melanie D. Purcell (“Employee”).

RECITALS

- A. The City desires to employ the services of Employee as the Director of Finance of the City of Ashland; and
- B. The City desires to establish certain conditions of employment for Employee; and
- C. It is the desire of the City to (1) secure and retain the services of Employee and to provide an inducement for Employee to remain in such employment, (2) to make possible full work productivity by assuming Employee’s morale and peace of mind concerning future security, (3) to act as a deterrent against malfeasance or dishonesty for personal gain on the part of Employee; and, (4) to provide a just means for terminating Employee’s services at such time as Employee may be unable fully to discharge Employee’s duties due to disability or when City may otherwise desire to terminate Employee’s services; and
- D. Employee desires to accept employment as the Director of Finance of the City of Ashland and to begin her work on September 24, 2020; and
- E. A change in the City’s Charter will take effect on January 1, 2021. Effective on that date, the current City Administrator position will be eliminated, and the duties of that position will be assigned to a new City Manager position. Also on that date, the duties of hiring, supervising, and firing certain department heads, including the Director of Finance, will also be transferred from the Mayor and Council to the position of City Manager. Accordingly, this Agreement identifies certain employment relationships from the start of Employee’s employment as set forth in Subsection 2.C. through December 31, 2020, and subsequent replacement employment relationships thereafter.

AGREEMENT

Now therefore, the City and Employee hereby agree as follows:

Section 1. Duties.

The City hereby agrees to employ Melanie D. Purcell as the Director of Finance of the City of Ashland to perform the functions and duties specified in the City Charter, the Ashland Municipal Code, and the job description for the position, and to perform such other legally and ethically permissible and proper duties and functions as the Mayor and/or City Council, until January 1, 2021, or the City Manager thereafter, shall from time to time assign. The Director of Finance shall devote full time to the performance of her duties.

Section 2. Effective Date; Term.

- A. Nothing in this Agreement shall prevent, limit, or otherwise interfere with the right of the Mayor, with the consent of the City Council until January 1, 2021, or the right of the City Manager thereafter, in accordance with the City Charter, from terminating the services of the Director of Finance at any time, subject only to the provisions set forth in the Section 11, "Severance Pay," of this Agreement. Except as specifically provided in this Agreement, Employee shall serve at the pleasure of the City without any requirement to demonstrate cause for dismissal.
- B. Nothing in this Agreement shall prevent, limit, or otherwise interfere with the right of the Employee to resign at any time from her position with the City, subject only to the provisions of this Agreement.
- C. Employee agrees to begin her employment with the City on September 24, 2020 (the "Effective Date") and to remain in the employ of the City until September 24, 2023, and neither to accept other employment nor to become employed by any other employer until this termination date, unless the termination date is affected as otherwise provided in this Agreement. This provision shall not restrict Employee from using vacation or personal leave for teaching, consulting, or other activities provided these activities do not conflict with the regular duties of the Employee and are approved in writing by the Mayor, with the consent of the City Council until January 1, 2021, or by the City Manager thereafter.
- D. In the event written notice is not given by either party to terminate this Agreement at least ninety (90) days prior to the termination date, this Agreement shall be extended for successive three-year periods on the same terms and conditions provided herein.
- E. In the event Employee wishes to voluntarily resign her position during the term of this Agreement, Employee shall be required to give the City not less than thirty (30) days written notice of such intention, unless such notice is waived by the

Mayor, with consent of the City Council until January 1, 2021, or by the City Manager thereafter. Employee will cooperate with the City in every way with the smooth and normal transfer of her position to the newly-appointed individual.

Section 3. Salary

Beginning September 24, 2020, City agrees to pay Employee a monthly salary at Step 7 of the salary schedule (\$11,269.36 per month). Employee will advance to the next step (\$11,551.10 month) after one year of employment with successful performance as determined by the City Manager. The City agrees to annually increase the monthly salary and/or benefits in the same percentage as may be accorded other department directors.

Section 4. Performance Evaluation.

The City Manager shall review and evaluate the performance of the Employee at least once annually. Employee shall receive a written copy of the performance evaluation and be provided an adequate opportunity for the Employee to discuss the details of the evaluation.

Section 5. Hours of Work; Administrative Leave.

It is recognized that Employee must devote a great deal of time outside the normal office hours to the business of the City, and to that end Employee will be allowed to take compensatory time off as Employee shall deem appropriate during normal office hours, so long as the business of the City is not adversely affected. Work in excess of forty (40) hours per week is deemed part of the professional responsibility for which the Employee shall not be paid overtime. In recognition of the extra hours required of the Director of Finance, Employee shall receive forty (40) hours of Administrative Leave each year to be used before June 30th, or it shall be deemed forfeited. Employee will receive additional Administrative Leave if granted by the City Council in the Management Resolution adopted each year.

Section 6. Automobile Allowance.

Employee's duties require that Employee shall have the use of a motor vehicle at all times during employment with the City. The City shall provide an automobile allowance of \$350.00 per month for the use of said motor vehicle for travel. Employee shall be responsible for paying for insurance, operation, maintenance, and repairs of the motor vehicle.

Section 7. Health Insurance, Sick Leave, and Other Benefits.

Except as modified by this Agreement, Employee shall be entitled to receive the same retirement, health insurance, vacation, sick leave benefits, holidays, and other fringe

benefits and working conditions as they now exist or may be amended in the future, as apply to any other department director, as set forth in the City's Management Resolution in addition to any benefits enumerated specifically for the Employee in this Agreement. Additionally, the City will provide forty (40) hours of vacation time and forty (40) hours of sick leave at the Employee's first day of work.

Section 8. Dues and Subscriptions.

City agrees to budget and to pay for the professional dues and subscriptions of Employee necessary for the continuation and full participation in national, regional, state, and local associations and organizations necessary for Employee's continued professional growth and advancement, and for the good of the City.

Section 9. Professional Development

The City hereby agrees to annually budget and allocate sufficient funds to pay necessary travel expenses of the Employee when she represents the City at conferences, trainings, official business meetings, or professional organizations that serve the City's interest and/or are reasonably necessary to provide for the Employee's professional advancement. Membership on any national or state commission or committee shall be subject to the approval of the City Administrator until January 1, 2021, or the City Manager thereafter.

Section 10. Professional Liability

The City agrees that it shall defend, hold harmless, and indemnify the Employee from all demands, claims, suits, actions, errors, or other omissions in legal proceedings brought against the Employee in her individual capacity or in her official capacity, provided the incident arose while the Employee was acting within the scope of her employment. If, in the good faith opinion of the Employee, a conflict exists with regard to the defense of any such claim between the legal position of the City and the Employee, she may engage counsel, in which event, the City shall indemnify the Administrative Services/Finance Director for the cost of legal counsel.

Section 11. Severance Pay

- A. In the event Employee is dismissed during the term of this Agreement, and Employee is not being dismissed for any reason set forth in Subsections B or C of this section, the City agrees to offer Employee a severance agreement. The amount of severance pay to be offered to Employee in the severance agreement shall be equal to Employee's monthly base salary at the time of dismissal, times the number of months that Employee has been employed with the City, up to a maximum of six (6) months total.

In addition, the severance agreement offered to Employee will require the City to continue to pay the employer portion of the premiums for medical and dental insurance coverage through the end of the month the Employee's severance pay is

intended to cover or until the last day of the month in which Employee obtains employment with alternative insurance whichever occurs earlier.

As a condition of the severance agreement, the Employee will be required to release the City, its officers, representatives, insurers, and employees from claims arising from employment with the City and the separation of employment.

- B. Employee will not be eligible to receive the severance agreement described in Subsection A of this section if this Agreement is not renewed by the City, as provided in Section 2, above. Employee also will not be eligible to receive the severance agreement if Employee breaches any provision of this Agreement, or if Employee engages in any act of misconduct in the performance of duties on behalf of the City. The term “misconduct” includes misappropriation, dishonesty, breach of trust, insubordination, neglect of duty, failure to perform duties in a manner that is consistent with applicable law, failure to correct performance deficiencies identified in writing by the City Council or the City Manager after a reasonable opportunity, as determined by the City, to correct the deficiencies; committing any violation of City policies or standards that the City deems a serious violation; or engaging in other action demonstrating a disregard for the interest of the City. The term “misconduct” also includes engaging in criminal acts or other off-duty behavior that the City views as impairing the Employee’s ability to effectively perform the Employee’s duties or as jeopardizing the reputation of the City.
- C. Employee will not be eligible to receive the severance agreement described in Subsection A of this section if Employee, in accordance with applicable law, is dismissed due to a disability that prevents Employee from performing the duties of the position.

Section 12. Amendments to Agreement.

City may, by written amendment to this Agreement, fix such other terms and conditions of employment from time to time, as it may determine relating to the performance by Employee, provided such terms and conditions are not inconsistent or in conflict with the provisions of this Agreement.

Section 13. Moving and Relocation Expenses

The City will pay expenses associated with moving Employee’s household to Ashland and will reimburse the actual costs associated with the move in an amount not to exceed \$10,000 (Ten thousand U. S. dollars). Moving expenses include packing, moving, storage costs, unpacking, and insurance charges for moving and storing Employee’s household goods. Moving expenses may also include actual lodging and meal expenses and mileage costs for moving two personal automobiles and shall be reimbursed at the current IRS allowable rate while the Employee is in transit. Moving expenses may also include actual lodging, meal expenses, and mileage (or airfare) for up to two visits to

Ashland for the Employee and family for purpose of securing a permanent residence. Finally, moving expenses may include the actual costs for Employee of securing temporary housing, prior to moving into permanent housing, for up to six (6) months.

Section 14. Severability.

If any term or provision of this Agreement is held by a court of competent jurisdiction to be illegal or in conflict with the laws of the State of Oregon, the validity of the remaining portions of the Agreement shall not be affected, and the rights and obligations of the parties shall be construed and enforced as if the Agreement did not contain the particular term or provision.

Section 15. Other Terms and Conditions of Employment

The Employee is subject to all personnel policies of the City and the City’s Management Resolution except to the extent that they are inconsistent with an express provision set forth in this Agreement.

Section 16. PERS Pick-up

Employee contributions to the Public Employees’ Retirement system (PERS) shall be “picked up” by the City. Employee shall not have the option of receiving money designated for retirement contributions and directly making the contribution to PERS. Employee’s reported salary for tax purposes shall be reduced by the amount of the PERS Pick-up.

Section 17. Complete Agreement

This Agreement constitutes the entire understanding between the City and Employee and supersedes all prior agreements, representations, and understandings between them, whether oral or in writing. No supplement, modification or amendment of this Agreement shall be binding on the City unless it is set forth in a writing and signed by the Mayor and approved by the City Council until January 1, 2021, or signed by the City Manager thereafter. Likewise, no waiver of any provision of this Agreement shall be valid unless set forth in writing and signed by the Mayor and approved by the City Council until January 1, 2021, or signed by the City Manager thereafter.

Dated this ____ day of _____, 2020

Melissa Huhtala
City Recorder

John Stromberg
Mayor

Accepted this ____ day of _____, 2020

Employee

CAREER OPPORTUNITY



CITY OF ASHLAND, OREGON

FINANCE DIRECTOR CITY OF ASHLAND, OREGON

\$103,312–\$138,613 DOE/DOQ

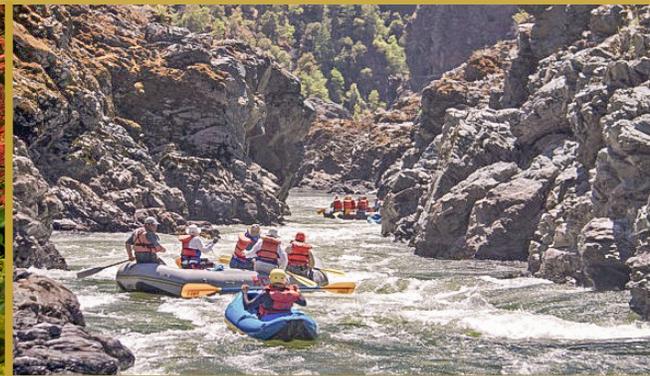
THE CITY OF ASHLAND SEEKS A FINANCE DIRECTOR who has organizational leadership, financial acumen, strategic business thinking, and effective leadership and communication skills. In this role you will be the City Administrator's strategic financial partner, lead a staff of 15 and play a leading role in supporting the great work the City of Ashland provides its citizens.





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

THE 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

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**

Melanie D. Purcell, CPFO, SCP-SHRM, CGAP

25+ years of government management experience specializing in:

- Strategic budgeting and financial management - designing collaborative and creative solutions; forecasting and planning for long-term financial resiliency
 - Operating and capital budgets from \$6 million to over \$1.3 billion
 - Redesign structures, processes, and policies for budgeting, payroll, accounts payable, accounts receivable and collections, purchasing, grants management, and financial reporting
- Supporting and directing department operations- Streamlining operations, policies, and focus; evaluating service effectiveness and customer engagement
 - Organize service provision including technology, staffing, and procedures in large and small organizations
 - Coordinate capital projects, implement new initiatives, transition services to different providers
- Human resources management, employee relations, and organizational design and development
 - In public agencies of two to over 10,000 employees including public safety, shift, field, and office
 - Restructure operations, processes, and policies for optimal service delivery
 - Design and deliver training in financial management, supervision, policies, and procedures
- Communications and engagement with employees and citizens
 - Develop and implement newsletters, committees, promotions, and feedback forums
 - Promote understanding of complex financial information through interactive online visualization, audience appropriate presentations, and clear written materials.

Direct Government Service:

Finance Director, March, 2019 – Present

Town of Pecos City, TX

\$45 million budget; 155 full-time positions (7 direct reports, 7 indirect); 13,250 resident population

Manage financial operations for fast-growing full-service city. Overhaul financial reporting, budgeting, accounts payable and receivable, utility billing, procurement, and fleet management. Develop and implement policies and procedures that reflect best practices and streamline processes. Write strategic fiscal plan, assist with crafting capital improvement plan and organization strategic plan, and solicit and implement enterprise resource planning (ERP) software. Train staff and facilitate development plans. Strengthen transparency, communication, and engagement efforts.

Administrative Services Director, January, 2016 – August, 2018

City of Sausalito, CA

\$30 million budget; 75 full-time positions (10 direct reports); 7,200 resident population

Managed finances of full-service, highly engaged community part of the San Francisco tourism destination market. Supervised Human Resources, Information Technology, and Property Management. Assisted in workers compensation, risk management, and retirement evaluations. Crafted job classifications and policies to improve services and internal controls. Managed contracts and leases, administered capital construction projects, and coordinated grant participation and reporting. Authored articles and made presentations to diverse audiences.

- Wrote detailed fiscal policies, fiscal forecast, and capital plans,
- Initiated and successfully articulated two tax initiatives in support of long-term financial resilience,
- Directed implementation of permit tracking software, and
- Facilitated comprehensive update of strategic plan including formulation of long-term fiscal and economic strategies and use of pension and OPEB trusts in 25-year funding tactics.

Director of Budget & Fiscal Planning, December 2014 – January 2016

Shelby County Schools, TN

\$1.3 billion budget; 12,500 positions (5 direct reports); 110,000 students

Managed operating and capital budget process and position control for large, urban school district. Solicited new budgeting software.

- Remodeled budget process to focus on goals, outputs, and organizational design while addressing structural shortfalls,
- Lead comprehensive review of positions, and account and organizational structures, and
- Recommended streamlined processes and appropriate budgetary controls in compliance with State law and Board policy.

Assistant Financial Services Director, May 2012- July 2013

City of Cape Coral, FL

\$277 million budget; 1280 full-time employees (8 direct and 55 indirect reports); 154,000 population

Managed daily operations of Financial Services Department. Researched extensively on pension reform, alternative revenues, and debt management options.

- Analyzed operations and options for Community Redevelopment Agency prior to takeover by City. Developed transition plan.
- Drafted comprehensive update of financial policies.

Assistant City Manager, April – November 2011

City of Norfolk, VA

\$1.3 billion budget; 3800 full-time + 6200 part-time employees (35 direct reports); 242,800 population

Supervised Budget & Grants Management, Communications, Information Technology, and Human Resources.

Served as Acting Human Resources Director and Civil Service Commission Secretary, supervising 35 staff.

- Redesigned Human Resources processes, communications, training, and employee relations units.
- Structured employee driven initiatives for engagement, recognition, safety, and wellness including dedicated and funded committees for policy and program development;
- Designed and delivered first city-wide supervisor training program to more than 800 employees;
- Facilitated priority setting with City Council and town hall meetings with neighborhoods; and
- Evaluated Enterprise Resource Planning (ERP) options for comprehensive, organization-wide solution.

Assistant Director, September 2008 – April 2011

Knoxville, TN

University of Tennessee Municipal Technical Advisory Service

\$6 million budget; 55 employees (8 direct and 47 indirect reports); 347 cities/~2500+ customers

Supervised operations for a state-wide, university-based municipal consulting practice. Provided technical assistance to local governments of all sizes with budgeting, finance, performance management, municipal operations, and strategic planning.

- Managed the Tennessee Municipal Benchmarking Program, increasing participation from 9 to 13 agencies, and conducted legislative and topic research;
- Taught courses in municipal budgeting, personal finance, performance management, budget forecasting, and financial management strategies to diverse audiences throughout the state;
- Managed graduate internship program and served as liaison with Political Science Department and Howard Baker Center; served as guest lecturer in graduate budgeting and management courses.

Budget Manager, January 2007 – September 2008

Washoe County, NV

\$887 million budget; ~2000 employees (8 direct reports); 400,000 population

Managed county-wide budget development and administration during dramatic decrease in revenues at onset of the recession. Drafted detailed revenue and expenditure projections including sales and property tax analysis. Supervised 8 budget analysts and served as Acting Finance Director during incumbent's absence. Managed account structure in SAP Enterprise Resource Planning (ERP) system.

- Managed Capital Improvement Program and assisted with special projects and financial analysis including debt financing, budget reductions, operations reorganization; and
- Facilitated department strategic analysis and programmatic cost-benefit evaluation in Juvenile Services,

Building, District Health Department, and Community Development.

- Coordinated multi-department joint contract efforts with Juvenile Services, Sheriff's Office, District Attorney's Office, and the District Health Department.

Deputy City Manager- Financial Services, March 2005 – March 2007

City of Howell, MI

\$35 million budget; 50 employees; 10,000 population

Directed city-wide financial operations. Supervised Information Technology and assisted with Human Resources, Parks & Recreation, and Community Development.

- Developed short- and long-term financial projections and strategies;
- Drafted services and operations redesign for Howell Recreation Authority; and
- Introduced centralized purchasing initiatives including purchasing card system and evaluation of encumbrance process within BS&A Financial Management software.

Director, Budget Management, March, 2002 – July, 2004

City of Flint, MI

\$330 million budget; 935 employees; 130,000 population

Revamped budget development process, established clear management controls, and restructured capital projects. Recommended management and financial tools to assist recovery in City's financial crisis; educated elected officials, employees, and public regarding City's financial conditions and changes in service delivery. Crafted ordinance and charter changes and assisted with labor negotiations and arbitration proceedings. Analyzed state legislation for local impact. Supervised planning, zoning and inspections functions and grant administration including HUD funded initiatives. Supervised up to 30 staff members.

- Developed and implemented, as part of Management Team under state appointed Emergency Financial Manager, a Deficit Elimination Plan to address \$28 million deficit, including aggressive financial controls to reduce deficit by over 70% with no substantive reduction in public services;
- Drove organizational redesign to increase services while eliminating 125+ positions.
- Reinstated code enforcement program by facilitating cooperative efforts by Building Department, Courts, City Attorney, Police and Finance to utilize new legislative options and non-traditional funding;
- Assisted in conversion of financial package from Peoplesoft Financial to BS&A.

Downtown Development Authority Director, March, 1999 – March, 2002

City of Plymouth Downtown Development Authority, MI

\$2 million budget; 2 staff; 300 businesses/50,000 population service area

Coordinated recruitment, retention, and promotion of quality businesses. Managed parking system and waste services. Administered Tax Increment Financing and Principal Shopping District.

- Created Capital Improvement Fund and long-term plan to address infrastructure needs; and
- Expanded downtown concert series to estimated 1000+ weekly attendance; and
- Expanded quarterly promotion publication from 15,000 to over 25,000 units.

Village Manager, April, 1998 – March, 1999

Village of Lake Orion, MI

\$8 million budget; 35 staff; 3200 population

- Served as Chief Administrative Officer and Downtown Development Authority Director.
- Implemented first network computer system; and
- Facilitated largest residential development in over 20 years.

Assistant City Manager, August, 1996 – July, 1997

City of Scottsbluff, NE

\$50 million budget; 120 full-time employees; 10,000 population

Supervised Water, Building & Zoning, and Parks & Recreation and other departments as needed. Served as Human Resources Director and Civil Service Secretary and as Public Information Officer. Negotiated labor

contracts and developed Wellness Program.

- Established regional recycling program through absorption of non-profit enterprise;
- Contracted operations of Waste Water Treatment Plant within 90 days for reduced cost and EPA compliance;
- Developed Citizen Connection strategy to improve communication and involvement of residents; and
- Rewrote Personnel Manual, Annual Budget, and Capital Improvement Plan.

Assistant to the City Administrator, May, 1993 - August, 1996

City of Ann Arbor, MI

\$250 million budget; 900 employees; 125,000 population

Performed budget, economic, and financial analysis including impact of state and federal legislation. Served Downtown Development Authority in absence of Executive Director. Negotiated and analyzed labor contracts.

Management Consultant/ In Transition

- City of Saginaw City Council Budget Workshop (07/2006)
- Interim Assistant Dept. Director for Finance - Milwaukee County Depart. on Aging (8/2004-3/2005)
 - Drafted strategic reorganization of MCDA Fiscal and Care Management Organization divisions and updated Solvency Plan to address deficits and compliance with state contract requirements.
 - Assisted county-wide financial analysis and review of Human Resources Information Systems proposals.
- Finance Director - City of Hillsdale, MI (2/1998-4/1998): Spearheaded first successful GFOA Budget Presentation Award submission.

Other Roles:

Budget Presentation Reviewer, April 1996- Present

Government Finance Officers Assoc. (GFOA)

Review budget documents from governments in the United States and Canada for compliance with GFOA Budget Presentation Awards standards including as a Policy Document, Financial Plan, Operations Guide, and Communications Document. Compensated for additional reviews since 7/2004.

Government Finance Specialist, July 2013 – April 2015

OpenGov, Inc., Redwood City, CA

Crafted Chart of Account and General Ledger structure analyses. Consulted with governments regarding effective use of GASB and GAAP standards in diverse accounting and ERP systems. Provided instructions and guidance regarding budget visualization system and public budgeting techniques. Translated General Ledger data into file uploads for budget visualization software. Developed and implemented comprehensive internal and external training programs.

Adjunct Lecturer

Human Capital Management, PA725; Spring, Summer 2014; San Francisco State University, San Francisco, CA
Politics of Public Budgeting, PLSC 352; Spring 2006; Eastern Michigan University, Ypsilanti, MI

Community and Event Volunteer, Seguin Animal Services (09/2018-Present), SJRC Texas Jingle Bell Run (12/2018), Comal Cops for Kids Turkey Trot (11/2018), Dipsea Kids Runners Jingle Bell Run (12/2016, 12/2017), Sausalito Jazz & Blues By the Bay (Summer 2017), Karns High School WinterGuard (Fall/Winter 2010), Knoxville Recreation Softball (2009-2010), Powell Middle School PTA Treasurer (2009-2010), North Valleys Softball Coach (2007-2008), Howell Recreation Soccer Coach (Fall 2005), Howell MelonFest (5/2006), Great American Bake Sale (11/2006), Howell Voyager Elementary School PTA (2005-2006), Howell Holiday Bazaar (12/2005, 12/2006), South Lake View Elementary School Holiday Bazaar (12/2004), St. Paul Lutheran School Holiday Bazaar (12/2002, 12/2003), St. Paul Lutheran School PTA (2002-2004)

Certifications:

Certified Public Finance Officer (CPFO)- Government Finance Officers Association, #354 (2007)

Senior Certified Professional (SHRM-SCP)- Society of Human Resources Management (2017)

Certified Government Auditing Professional (CGAP)- Institute of Internal Auditors (2018)

Education:

Master of Public Policy

University of Michigan

Bachelor of Arts - Major: Economics, minor: Mathematics

San Francisco State University

Professional Associations Service:

GFOA- Committee on Benefits and Retirement Administration (2004-2010, 2016-Present), CPFO Council (2017-Present), CPFO Task Force (2018-Present), Budget Review (1996-Present), PAFR Reviewer (2008-Present)

Member: Government Finance Officers Association (GFOA) 07/1995-Present
Society of Human Resources Management (SHRM) 02/2016-Present
Institute of Internal Auditors (IIA) 08/2016-Present
Government Finance Officers of Texas (GFOAT) 08/2018-Present

Publications/ Research:

- Government Finance Review, “Personnel Budgeting” (10/2017), “The Value of Regularly Reviewing the Chart of Accounts” (06/2014), “Fiscal Constraints & Workforce Management” (08/2012), “Human Resources as a Budget Building Block” (04/2012), “More than Just Cuts” (11/2009); “Best Practices: Healthcare Cost Containment Strategies” (04/2009); Co-author- “Fiscal First Aid” (10/2008)
- GFOA Women’s Network Conference Newsletter, “Personal Fiscal Health” (06/2009); Association of Budgeting and Financial Management, “Severe Storm Watch throughout Michigan: Financial Emergency Predictors” (10/2006); Association of Public Policy and Management, co-author “Federal Medicaid Waiver Programs and their Impact on Local Governments: Observations from Milwaukee County’s Family Care Program” (11/2005); MI Municipal Review, AZ Gov’t. Finance Officers Assoc., “Budgets that Build Public Trust” (2003)

Presentations:

- GFOA Training Seminars, “Best Practices in Budgeting – Budget Monitoring/Performance Measures” (03/2019), “Communicating the Budget” (02/2018, 12/2018, 03/2019), “Pension & Benefit Management” (10/2018), “Capital Budgeting; Communicating the Budget” (08/2018), “Program Budgeting” (02/2018), Personnel Budgeting” (01/2018), “Fees and Charges” (01/2018)
- GFOA Webinar, “Financial Transparency” (04/2019), “Innovations in Retrenchment” (01/2011); “Politics and Leadership in Fiscal Distress” (11/2010); “Fiscal First Aid” (06/2009)
- CA League of Cities Municipal Finance Institute, “Long-term Planning and Forecasting” (12/2017); FGFOA Academy of Governmental Sciences, “Financial Forecasting” (11/14)
- GFOA Annual Conferences, “Bad Boss, Bad Environment” (05/2018), “Personnel Budgeting” (05/2017), “Are Your DC Fees Reasonable?” (06/2013), “Changing Compensation Strategies” (6/2011), “Pension and Benefit Plan Consultants: What Can They Do for You?” (6/2008)
- National Council on Teacher Retirement Annual Conference, “Elected Officials Panel- Impact of Pension Issues on Governments” (10/2011); City County Communication Management Association (3CMA) Annual Conference, “Measuring Communications Success” (09/2011); Association of Government Accountants, E. TN Chapter, “Municipal Benchmarking and Performance Management” (09/2010); TN Assoc. Municipal Clerks & Recorders, “Budget Forecasting” (04/2010); TN Government Finance Officers Assoc., “Healthcare Cost Containment Strategies” (02/2010); GFOA Women’s Network meeting, “Gender and Generations” (01/2010); American Society for Public Administration, “Fiscal First Aid” (12/2009); Michigan Municipal League, “Elected Officials Guide to Municipal Finance” (07/2004); “Communicating through the Budget” (11/2002)