

SUMMARY

A dynamic leader with thirty two years of local government management experience and extensive expertise in the following areas:

- Financial Operations and Budget
- Operations and Project Management
- Labor Relations
- Creative Problem Solving
- Organizational Change and Development
- Strategic Planning and Operations Analysis
- Contract Negotiations and Administration
- Debt Financing
- Technology Upgrades

A strategic leader and thinker with strong demonstrated organizational, operational, analytical, interpersonal and communication skills. A passionate and accountable public servant dedicated to bringing together leadership, vision, and focus to continue to make Coconut Creek the premier city to live, work and play in South Florida.

RELEVANT LOCAL GOVERNMENT EXPERIENCE

City of Coconut Creek, Florida

<i>Deputy City Manager/CFO</i>	August 2017-Present
<i>Assistant City Manager/Director of FAS</i>	August 2016- August 2017
<i>Director of Finance and Administrative Services</i>	August 2002-August 2016
<i>Deputy Director of Finance and Administrative Services</i>	August 1999-August 2002
<i>Comptroller</i>	May 1997-August 1999

Coconut Creek, Butterfly Capital of the World, is a city with a population of 59,000 covering approximately 12 square miles in northern Broward County, Florida (population 1.9 million). In 1997, I was specifically recruited for the position of Comptroller for the City of Coconut Creek by current City Manager Mary C. Blasi due to my proven track record in the City of Tamarac of outstanding financial acumen and leadership attributes.

Duties and Responsibilities:

- Assists City Manager in the daily operations, administration, and activities of the City as well as identification and resolution of long-range issues.
- Directly involved with the development and implementation of the city’s overall strategic planning process as well as business planning, project management, and performance measurement operations.

- Assists with oversight responsibility for the following functions: police, fire and EMS services, planning, zoning, building, recreation, parks, roads, stormwater drainage, water and sewer utilities, public works, finance, human resources and risk management, information technology, community relations and general services.
- As Chief Financial Officer, directs and administers the daily operations of the department including accounting, budget, treasury, debt, investments, purchasing, utility billing and city hall reception as well as long range financial forecasting and planning.
- Responsible for annual audits and preparation of City's Comprehensive Annual Financial Reports (CAFR)receiving the "Certificate of Excellence in Financial Reporting" from GFOA every year.
- Preparation and administration of the City's \$157M operating and five-year capital improvement budget.
- Investment manager of City's \$129M portfolio.
- Participates in negotiations with public and private sector entities on a variety of matters including economic development and growth, service contracts and quality of life issues.
- Responsible for the City's compliance with County, State and Federal regulations including financial, health, environmental and labor. Assists with annual State and Federal Legislative Agendas.

Achievements:

- Directed the recovery of \$9.6M through FEMA stemming from losses due to Hurricanes Irma, Wilma, Matthew, Katrina, Jeanne and Frances.
- Participated as a member of the City's management team in initiating, negotiating and implementing the City's Municipal Service Provider Agreement (1999 MSPA), Mitigation Agreement (2010), and Land Lease (2011) with the Seminole Tribe of Florida. Currently, the City collects over \$6.7 million annually under the MSPA and Mitigation provisions.
- Devised sound financial plans to secure over \$87M in debt financing for numerous desired capital investments including land purchases, undergrounding of FPL lines, construction of the PW/EOC building, renovation of City Hall, comprehensive street improvement program, and several other projects from the City's Capital Improvement Program. Refinancing of five revenue notes resulted in improved repayment terms and cost savings of \$356,000.
- Upgraded, revamped and evolved the procurement function overhauling the Purchasing Policies and Procedures Manual adjusting thresholds for efficiency, implementing a P-card card program generating annual rebates including \$260K for 2018, and implementing a citywide contract administration program to ensure contract compliance and accountability.
- Initiated, developed and implemented a program budget format tied to the City's strategic plan incorporating accountable performance measures and allowing the Commission and department directors to focus on cost of services vs line item expenditures.
- Implemented a \$1.5 million special assessment for the Wiles Road utility infrastructure improvement project and a \$900,000 special assessment for the Cullum Road utility conversion project.
- Implemented the City's participation in the Florida Retirement System (FRS) for Elected Officials, Special Risk, and Regular and Senior Management employees of the City including the difficult task

with FRS and ICMA Retirement Corp. to allow City sworn officers the ability to purchase up to 11 years of prior service credit to greatly enhance their FRS pensions by using ICMA plan funds.

- Initiated and received the City's first Annual Distinguished Budget Presentation Award for FY2001 on first submittal from the Government Finance Officers Association of America. City has received the award each year since and has received special recognition for our performance measures and capital improvement program.
- Implemented a fee schedule for annual fire assessments, monthly stormwater user fees, and police and fire impact fees. Proposed and implemented a tiered rate billing system for water rates to promote water conservation.
- Privatized for increased quality of service and cost savings, the City's vehicle and equipment maintenance, utility meter reading, utility bill production and mailing, school crossing guard and the janitorial functions. Realized annual cost savings of over \$500,000.
- Directed the implementation of a new complex financial reporting model required by GASB Statement #34. Implemented all required accounting standards through GASB Statements #89 with no audit findings or recommendations.
- Placed the franchised waste hauler service fees for single family residences on the annual tax bill due to collection issues. City realized over \$48,000 annual increase in franchise fee revenue and \$24,000 in annual administrative fee revenue from franchisee.
- Participated in the creation, identification and implementation of branding and marketing ideas to promote Coconut Creek as "Butterfly Capital of the World" including initiating: an annual Butterfly Festival sponsored by local businesses and completely free to residents, an annual Butterfly Run, an employee suggestion contest that resulted in our butterfly logo, "Fluffy," and numerous other graphic depictions and events focused on relaying our trademark.
- Forecasted real estate bubble and subsequent market collapse successfully proposing prudent budgets utilizing attrition to reduce payroll and other cost saving measures. When the collapse occurred and property tax revenue was significantly reduced, layoffs were avoided, only minor modifications in operations were required and necessary capital improvement projects continued creating jobs and value for the community.
- Led the procurement and implementation of a new integrated financial software system in the City including conversion and training to replace a 17 year old computer software system.

City of Tamarac, FL

<i>Controller</i>	1993-1997
<i>Interim Purchasing Officer</i>	1996
<i>Chief Accountant</i>	1990-1993
<i>Accountant</i>	1987-1990

Tamarac is a city in Broward County with a population of 65,000 covering approximately 12 square miles. Through progressively responsible positions, I oversaw all aspects of governmental accounting and was responsible for implementing efficient and effective programs in the areas of treasury management, debt management, budget, payroll administration, investments, financial reporting, financial policies and procedures.

Achievements:

- Directed and coordinated day to day operations of the finance department implementing evolving technology into operations.
- Served as full member of the City's team during contract negotiations for the Federation of Public Employees Collective Bargaining Agreement
- Principal contributor to the utility system consolidation team which combined two separate water and sewer utility systems into a single system.
- Lead member of several committees affecting city operations including Facility Utilization, New Technology, and Pension and Benefits.
- Lead agent in the development and implementation of a technology upgrade for water and sewer utility billing and remittance operation.
- Directly responsible for city's annual audit and Comprehensive Annual Financial Report receiving the "Certificate of Excellence in Financial Reporting" from GFOA for each year that I served.
- Initiated, developed and administered city's first auction of surplus equipment in several years.
- Decentralized city warehouse function reducing labor costs and delivery times.
- Streamlined purchasing requisition process eliminating unnecessary administrative procedures.
- Automated processes between the finance and human resources departments for employee benefit payments resulting improved accuracy and time savings.
- Successfully coordinated city's documentation of losses from Hurricane Andrew receiving over \$150,000 in reimbursement.
- Received the City's first Annual Distinguished Budget Presentation Award for FY1996 on first submittal from the Government Finance Officers Association (GFOA).

Greater Fort Lauderdale Chamber of Commerce, FL

Accounting Assistant

1987

Responsibilities included accounts payable, accounts receivable, purchasing, cash flow reports, bank reconciliations and journal entries.

Achievements:

- Initiated, developed and implemented an automated cash register system for front lobby operations.

EDUCATION

Nova Southeastern University – Davie, FL

April 1995

- Master of Business Administration

Fort Lauderdale College – Ft. Lauderdale, FL

May 1988

- Bachelor of Science in Accounting
- Summa Cum Laude

University of Virginia – Charlottesville, VA

August 2014

- Weldon Cooper Center for Public Service
- ICMA Senior Executive Institute

CERTIFICATIONS and PROFESSIONAL AFFILIATIONS

GFOA – Certified Public Finance Officer (2001)

FGFOA– Certified Government Finance Officer (1996)

Association of Public Treasurers of the US and Canada – Certified Public Funds Investment Manager (2010)

ICMA – Credentialed Manager (In progress)

Member – International City/County Management Association (ICMA), National and State Government Finance Officers Association (GFOA) (FGFOA), Urban Land Institute (ULI), Coconut Creek Chamber Council, Florida League of Cities

Honors – GFOA Popular Annual Financial Report (PAFR) award reviewer, Former City of Tamarac Pension Board trustee, Former alternate trustee of the Southeast Risk Management Association (SERMA), Former Town of Davie Budget Review Committee board member, Who's Who Among Students in American Universities & Colleges (1988)