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EXECUTIVE SEARCH



Administrative Services Director/
City Treasurer
CITY OF LAGUNA WOODS, CALIFORNIA

THE COMMUNITY

Ideally located in the heart of South Orange County and only five miles from the Pacific Ocean, Laguna Woods is an active adult community of 16,500 nestled between Laguna Beach, Laguna Hills, Aliso Viejo, Irvine, and the Laguna Coast Wilderness Park. While a newer city incorporated in 1999, Laguna Woods has long been recognized for its outstanding quality of life and proximity to diverse open space; and it was recently recognized as one of the safest cities in California. The city's just over three square miles is primarily residential with 88 acres of commercial property and 324 acres of open space.

Assessed property values in Laguna Woods rose 6.46% in 2018 and the city has a stable tax base. In addition to its residential base, Laguna Woods is also home to well known businesses such as Home Depot, Olive Garden, CVS, Rite Aid, Ayres Hotel, Mother's Market, ALDI Food Market, and Stater Brothers. The business community generated \$78 million in taxable consumer sales in 2018. The City partners with the Small Business Administration's SCORE program to host monthly workshops to support its local businesses. Some of California's finest colleges and universities are located conveniently close, as are Interstates 5 and 405, State Routes 73 and 133, John Wayne/Orange County Airport, and the greater San Diego, Orange, and Los Angeles regions.

Laguna Woods has a median age just over 77 and 80% of the total land area is occupied by the Laguna Woods Village retirement community. A majority of residential units in the city – which include a mix of condominiums, apartments, cooperatives, and assisted living – are age restricted.

Laguna Woods offers a variety of recreation options for all ages. In addition to the City's open space such as its dog park, City Centre Park, and Woods End Wilderness Preserve, Laguna Woods borders the 7,000 acre Laguna Coast Wilderness Park and is located nearby the 4,500 acre Aliso Woods Canyons Wilderness Park.

Laguna Woods offers a stable political climate and due to its small size, lack of bureaucracy and flexible work environment, is an exceptional employment opportunity. To learn more about the City of Laguna Woods, please visit www.cityoflagunawoods.org.

THE ORGANIZATION

Laguna Woods is a general law city operated under the Council/Manager form of government. The five-member City Council is elected at large to four-year terms and holds monthly regular meetings in the afternoon. The City Council appoints the City Manager and City Attorney. The City Manager oversees four departments and 7.45 full time equivalent employees. The organization prides itself on its priorities to create a City that is "healthy and safe, high in quality of life, environmentally conscious, economically prosperous, fiscally responsible, and professionally and efficiently served."

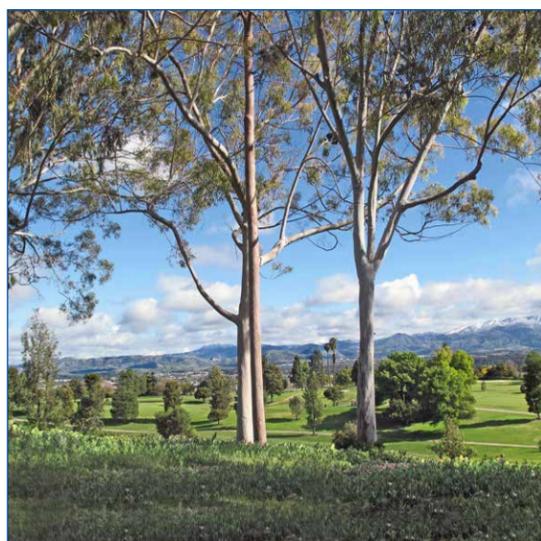
Laguna Woods is a contract city with many services provided by contract rather than by City employees. The Orange County Sheriff's Department provides police services under contract with the City and rising law enforcement costs are an important

financial concern. The City is a structural fire fund city with fire and emergency medical services provided through the Orange County Fire Authority. Library services are provided through the County of Orange.

As part of its fiscal responsibility the City maintains high standards for financial reporting and operations. It is proud of its Operating Budget Meritorious Award for 2017/18, Certificate of Achievement for Excellence in Financial Reporting for 2016/17, and its unmodified audit opinion for all recent audits. The 2017/18 All Funds Budget totaled \$8.21 million and the unassigned fund balance at the end of fiscal year 2018 was 108% of the General Fund budget. It is one of the few cities to have fully funded CalPERS retirement plans.

Laguna Woods also prides itself on its long term planning efforts; operating under a two-year budget, a five-year strategic financial plan, and an 11-year capital improvement plan, in addition to maintaining a 10-year pavement management plan.

The Administrative Services Department provides professional support to the City Manager and includes the functions of finance, accounting, purchasing, payroll, human resources, and information technology, as well as administration of insurance and workers compensation programs.



In addition to the Director, the Department includes a full-time Accountant and a full-time Accounting Clerk. The Department recently completed its transition to a new financial software system (Tyler Technologies' Incode 10) and is supporting the Planning & Environmental Services Department's transition to electronic permitting (Tyler Technologies' Energov). Important upcoming Department projects include refining forecasting models, assisting with the implementation of cyber security improvements, and maintaining the high standards for financial reporting and operations, as well as the emphasis on long term planning.

Due to its small size and lack of bureaucracy, Laguna Woods provides an opportunity for true work/life balance. The City does not, however, offer compressed work schedules due to its small staff size.

THE POSITION

The Administrative Services Director/City Treasurer position requires a high level of both technical and managerial skills applied in a public agency finance setting. A typical way of attaining the necessary skills includes a Bachelor's Degree with major coursework in finance, accounting, business administration, or similar subject and five years of increasingly responsible full-time work experience in relevant operations and activities. Possession of a Master's degree, prior supervisory experience in a municipal finance or accounting position, and certification as a California Municipal Treasurer and/or Certified Public Accountant is highly desirable.

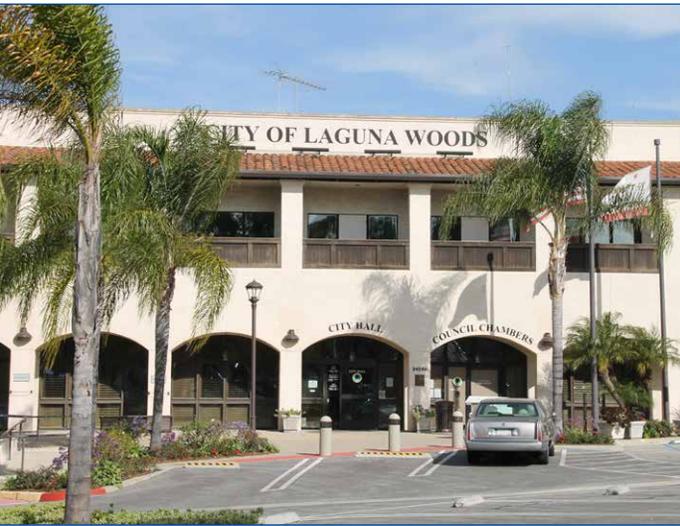
ESSENTIAL DUTIES OF THE POSITION INCLUDE:

- Plan, organize, direct, coordinate, manage and oversee the operations and activities of the Administrative Services Department in accordance with the established goals and policies of the City.
- Serve as the City Treasurer, including undertaking investment transactions.
- Prepare comprehensive annual financial reports. Coordinate and report on audit processes.
- Establish and maintain an effective system of internal controls and checks and balances.
- Develop, recommend, and implement the operating and capital budgets and manage the budget process.
- Ensure compliance and accuracy in accordance with all laws and standards that apply to assigned duties. Ensure the functions of the Department are performed in a safe, efficient manner and manage risks. Maintain knowledge of laws, potential legislation, best practices and trends; incorporating as appropriate.
- Supervise, develop and evaluate the performance of staff and recommend hiring, promotions, and salary changes. Establish clear objectives and goals, and attract and retain excellent staff members. Implement discipline and termination when necessary.
- Perform duties to support or relieve subordinate employees or to meet Department demands, including technical accounting functions.
- Perform human resources functions including classification, compensation, recruitment, testing, screening, negotiation, file management, investigations, benefit programs, and occupational health and safety programs.
- Coordinate with information technology providers to ensure operation and security.
- Administer insurance and workers compensation programs. Negotiate, develop, and administer contractual agreements.
- Serve as staff liaison and support one or more City committees.
- Prepare and present oral and written reports. Communicate effectively both orally and in writing with a variety of audiences, including the public.
- Ensure the City Council and City Manager are well informed.
- Represent the Department in legislative advocacy and with other government agencies and contractors.
- Serve as the Chief Financial Officer of the Laguna Woods Civic Support Fund, a non-profit public benefit corporation and blended component unit of the City.
- Serve as a member of the citywide executive team.
- Ensure excellent customer service.

To be successful, the new Administrative Services Director/City Treasurer should exemplify the following:

- A high energy, hardworking financial professional willing to go the extra mile.
- A working director who is also a high functioning accounting technician able to support and relieve subordinate employees.





- Ability to plan, organize, administer, coordinate and direct the activities of a local government administrative function, and to take ownership for results.
- Outcomes oriented with high performance expectations for themselves and others, including an ability to keep deadlines and commitments.
- An inclusive, strategic, and humble leader who can effectively supervise and motivate employees, hold employees accountable and quickly earn the confidence, respect and cooperation of others.
- Lack of ego, but with decisiveness and confidence in their abilities.
- Self-reliant and understanding of the City Council's and City Manager's expectations.
- An apolitical leader who can exercise a high degree of tact, judgment, and discretion and maintain the highest standards of ethics and integrity, earning trust and respect.
- An effective communicator and partner who can establish and build smooth and effective working relationships both within the City organization and

with a wide range of public officials, contractors, members of the public, and other agencies while being an effective advocate for the City.

- An individual committed to ongoing professional development with an extensive knowledge of laws, regulations, operations, municipal management, best practices, and legal procedures including safety and risk management practices.
- Energized by this exciting opportunity.
- Must possess a valid Class C California Driver's License and must qualify for and maintain insurability under the City's Vehicle Policy.

THE COMPENSATION

The annual salary range for this position is \$110,982-\$155,374 and appointment will be made commensurate with experience and education. In addition, the City offers the following benefits:

RETIREMENT – Classic members with less than 6 months separation: CalPERS 2% at 55, 7% employee contribution. New Members: CalPERS 2% at 62, employee contribution rates set by CalPERS. In addition, the City participates in Social Security, with a total 7.65% mandatory employee contribution for Social Security and Medicare.

MEDICAL, DENTAL AND VISION INSURANCE – The City provides \$1,000 per month (less a mandatory contribution to the employee assistance program) that can be applied toward medical, dental, or vision insurance, as well as to a health savings account.

LEAVES – The City offers Paid Time Off of 160 hours per year with accumulation up to 480 hours. Additionally, the City offers nine regular holidays, two floating holidays, and paid time off for December 24- January 1.

DEFERRED COMPENSATION – The City offers an optional 457 deferred compensation plan through ICMA-RC.

SEARCH SCHEDULE

Resume filing deadline	April 23, 2019
Preliminary interviews	April 29, 2019
Recommendation of Candidates	May 2, 2019
Panel Interview Process	May 9, 2019
Finalist Interview (if needed)	May 10, 2019

These dates have been confirmed, and it is recommended that you plan your calendar accordingly.

THE RECRUITMENT PROCESS

To apply for this exciting career opportunity, please visit our website at:

Peckham & McKenney
www.peckhamandmckenney.com

Resumes are acknowledged within two business days. Please do not hesitate to contact Ellen Volmert at (866) 912-1919, if you have any questions regarding this position or the recruitment process.



www.peckhamandmckenney.com