

Finance Director

CITY OF SAN MARINO, CALIFORNIA



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THE COMMUNITY

Situated 12 miles from the majestic foothill mountains, the beautiful City of San Marino, CA (population 13,327) is located northeast of Los Angeles in the San Gabriel Valley. Incorporated in 1913, this uniquely residential community is known for expansive properties surrounded by beautiful gardens, wide streets, well maintained parkways, and top performing schools. A city of 3.75 square miles, San Marino is home to the renowned Huntington Library, Art Collections, and Botanical Gardens.

With a focus on resident services and community, the City of San Marino supports quality police and fire services, extensive recreation and library programs, an exquisite park and multiple community recreational facilities, and planning and zoning that maintain the community's high-quality residential character. The City's appeal as a small community, its attention to residents, and being ranked as the 14th safest city in California makes San Marino among the region's best places to live.

San Marino residents are well educated and successful, and include long time homeowners, young families, and second homes. The City enjoys a high level of resident involvement on local matters and volunteerism. Based on the City's high property values, property tax revenue, and fiscal conservatism, the community is financially stable and secure.

Located near the 10, 210 and 710 freeways, the City of San Marino is in proximity to all major Southern California destinations. Recreational and cultural opportunities are numerous in and around San Marino and complement all interests. The California climate invites residents and visitors to enjoy hiking in the foothill mountains, exhibits at The Huntington, historical culture at the Old Mill Foundation, and Lacy Park.

To learn more about the City of San Marino, please visit www.cityofsanmarino.org.

THE ORGANIZATION

The City of San Marino is a General Law city and operates under a Council/Manager form of government. The City Council consists of five members that are elected at-large and typically serve staggered, four-year terms. Mayor and Vice Mayor seats typically are one year in duration and are selected by the Council Members. The City Council appoints the City Manager and the City Attorney. The City Treasurer is also appointed by the City Council.

The City of San Marino provides an array of services for the community. The City currently has 135.94 authorized full-time equivalent employees (FTEs) within the departments of Administration (including City Manager, City Clerk, and Public

Information), Community Services (including Recreation and Library), Finance (including Human Resources and Information Technology), Fire, Planning & Building, Police, and Parks & Public Works. The 2019/20 Operating Budget is \$25.8 million and the Capital Budget expenditures total \$7.3 million. By policy, the City maintains an unassigned General Fund reserve balance of at least 40% of revenue, which the City currently exceeds with a reserve of approximately 72% projected at FY 2019/20 year-end. San Marino primarily relies on property tax revenue with roughly 66% of revenue from this source. As such, the 2008 recession had little impact on the City's financial condition. To complement property tax revenue, the City is currently embarking on an economic development program to build its sales tax base and enhance the community's vibrancy. As determined by the City's 2018 Long Term Strategic Financial Planning Committee, the City is also well positioned to withstand and meet pension obligations without significant impact to its budget.

A considerable component of the City's revenue is a public safety parcel tax that will be before voters for renewal in November 2019. Instituted in 1980 as a result of Proposition 13 and approved 10 times to date, the revenue supports 27% of the combined costs of the City's police and fire services and represents approximately \$3.4 million annually.



Since being appointed as City Manager two years ago, Dr. Marcella Marlowe is building an excellent team of skilled and talented professionals who are dedicated and empowered to move the City forward. The leadership team consists of positive and enthusiastic department directors and other key positions who value thoughtful conversations, collaboration, and laughter. The organization's strong work ethic is also complemented by a work-life balance that is supported by the City Manager. The City Manager embraces a "Just Do It" approach for the leadership team. In turn, with her commitment to empowering executives, she expects collaboration and mutual loyalty. With a goal of organizational stability and connectivity, it is also the expectation that the leadership team actively participates in community events and programs. The City Manager additionally prioritizes ethics, respect, trust, and credibility among staff. This new leadership culture and approach represents a transformational re-birth of the organization for bringing best practices, operational enhancements, organization, and administrative policies and procedures to City services and operations.

The Finance Department's mission is to provide accurate, understandable, professional, financial, budgetary, accounting, payroll, and treasury services; develop and implement policies and guidelines; institute best practices; work with city-wide departments; and prepare and present the budget and other financial reports. Although the Director should have broad financial background



in the areas of accounting, payroll, and investments, the City is particularly interested in a candidate with expertise in budgeting (operating and capital), revenue and expense projections, procurement, and the administration of state and federal grants and donations. The Finance Department has a dedicated staff of 3 employees consisting of an Accounting Manager/Controller (CPA) and two Account Clerks (for accounts payable and payroll).

THE POSITION

The ideal candidate is an individual who is comfortable in an action-oriented environment. She/he must be able to successfully and credibly communicate with a wide variety of audiences to articulate the budget, policy recommendations, project goals, and City vision. While the successful candidate may be an existing director or new to the title, it is most important that she/he have a strong background and foundation in finance and personal desire to make a difference.

The Finance Director, besides overseeing the Finance Department and working collaboratively with department staff, is responsible for working closely with the other department directors in preparing the operating and capital budget and communicating with the City Council on such matters. The Finance Director must be "hands-on" for preparation of the fiscal year budget. In addition, she/he is responsible for preparing, coordinating, administering, and facilitating projects, policies and guidelines, and contracts. Projects will include preparation of informative and educational materials for the public safety parcel tax election in November 2019, the development and implementation of policies and procedures for procurement, review of city-wide contracts, and investment management, among others.

Qualities sought in candidates include professionalism and leadership, collaboration, ability to train and coach, fun-loving, organization, and patience. The successful candidate is desired to bring stability to the Finance Department and integrate her/himself into the fabric of the organization.

The Finance Department has a close working relationship with the Human Resources and Information Technology functions. As such, the Finance Director will additionally provide overall, broad oversight of Human Resources (HR Manager and Administrative Assistant) and Information Technology services (provided through a contract by IntelesysOne). While experience and background in these functions is not a requirement for the position, the successful candidate must have with the ability to learn key aspects of them.





Any combination of education, experience, and training that would provide the required knowledge, skills and abilities will be considered qualifying. A typical background would be a bachelor's degree (master's degree preferred) in finance, accounting, business administration, or a related field, and at least five years of increasingly responsible municipal experience in financial management, budgeting, or accounting, including three years of supervisory experience. Possession of a Certified Public Accountant or Certified Management Accountant designation is a plus, but not required.

THE COMPENSATION

The annual salary range for the Finance Director is \$132,192 to \$167,904, and appointment within the range will be dependent upon the qualifications and experience of the selected candidate. The City also offers a competitive benefits package, as follows:

RETIREMENT: Depending on selected candidate's prior membership with CalPERS, the retirement formula will be 2% @ 60 (which tops out at 2.418%

@ 63) or 2% @ 62; employee contribution towards retirement benefit is the employee portion for "classic" members or 50% of the normal costs of membership (currently up to a 7% contribution depending on prior CalPERS membership) for members under PEPR. The City does not participate in Social Security, but employees must be enrolled in the Medicare portion.

MEDICAL, DENTAL, VISION, INSURANCE LONG- AND SHORT-TERM DISABILITY INSURANCE, AND LIFE INSURANCE: The City provides an allowance of \$1,200 per month toward the costs. The City subscribes to CalPERS for options of medical insurance.

ADMINISTRATIVE LEAVE: 80 hours annually.

VACATION: 90 and up to 180 hours of annual vacation time accrual based on years of service.

SICK LEAVE: 120 hours of sick leave annually with a cash-out option available.

HOLIDAYS: 11 holidays annually.

BEREAVEMENT LEAVE: 3 or 5 days (depending on location) per circumstance.

WORK SCHEDULE: City Hall hours are Monday through Thursday from 7:00 a.m. to 5:00 p.m., and Fridays from 7:00 a.m. to 12:00 p.m. (Note: City Council meetings are the second Wednesday of each month (except August) and the last Friday of the month at 8:30 a.m. (except August, November and December).

Other benefits offered by the City of San Marino include a catastrophic leave bank, retirement health savings plan, and voluntary deferred (457) compensation plan.

SEARCH SCHEDULE

Resume filing deadline September 11, 2019
Preliminary Interviews September 16 –
September 20, 2019
Recommendation of Candidates .. September 25, 2019
Finalist Interview Process October 4, 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 Tony Dahlerbruch at (310) 567-1554 if you have any questions regarding this position or recruitment process.



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