



FINANCE DIRECTOR

Orange, California

Recruitment Services Provided By



The Opportunity

The City of Orange offers its next Finance Director a career-defining opportunity to lead in a city with a high-performing organizational culture where employees make important contributions and are valued as team members. The new Finance Director will have the opportunity to lead projects and staff without the distractions found in less successful environments, all in an ideally located city with rich historical significance. This vacancy gives the successful candidate an opportunity to join an Executive Management Team that enjoys working together and supporting one another.



The City of Orange

The City of Orange was incorporated in 1888. It has grown to more than 20 times its original geographic size yet managed to maintain the small-town values upon which it was founded. More than 140,000 residents live in the 27 square miles that make up the City of Orange today. The City's planning area is 38 square miles, with a sphere of influence area of 55 square miles. Orange's regionally strategic location makes it easy and efficient to move people and products throughout the Southern California marketplace. The City has a healthy mix of prime office, residential, and industrial space. Companies in all economic sectors, from financial services to health care, and retail trade to construction, recognize the advantages Orange has to offer. Its prime location offers direct access to five major freeways, a commuter rail network, two major malls and ample public transportation. Orange is convenient to half a dozen major airports, harbors, and ports and at least ten more major shopping malls.

The City is fortunate to have a history of being fiscally, organizationally, and politically stable. Orange is also known for having a very positive organizational culture that places a high value on teamwork and mutual support.



City Government

The City of Orange operates under a Council-Manager form of government, and recently transitioned to district-based elections and a seven-member City Council. The City Council is elected by district for four-year overlapping terms with a two-term limit. The Mayor is elected at large for a two-year term with a three-term limit. As the presiding officer of the Council, the Mayor is the official head of the City for all ceremonial functions. The Mayor pro-tem is selected by the Councilmembers. An elected City Treasurer oversees the City's investments.

Through its 12 departments, the City provides traditional municipal services as well as a water utility and a municipal library system. The City Manager is the Chief Executive Officer and head of the administrative branch of the City government. Orange provides a full range of services for the community through Police, Fire, Public Works, Community Development, Finance, Community Services, Library Services, Human Resources, Information Technology, City Clerk's Office, City Attorney's Office, and City Manager's Office. The City's 2022-2023 fiscal year budget is approximately \$228 million, \$131 million of which is General Fund. Orange is currently funded for 765 full-time equivalent positions.

The City of Orange is committed to excellent service through teamwork. This is reflected in a cohesive Executive Management Team that works collaboratively and supports each other to ensure the entire organization is successful. The City of Orange prides itself on its well-trained, well-educated, and performance-based workforce.





Mission Statement

The City of Orange is committed to excellent service for our residents, businesses and visitors.

Vision

As an organization, the City of Orange is the leader in delivering the highest level of service to meet current and future needs of the community.

City Values

Teamwork, Integrity, Excellence

The Finance Department

The Finance Department is committed to providing effective, prudent, and efficient financial planning for the City of Orange. In addition to managing the City's assets, the Finance Department maintains financial records in compliance with Federal and State laws and advises City officials with financial information to make informed decisions.

Currently, the Department is budgeted with 31 full-time positions and has a FY 22-23 budget of approximately \$3.67 million. Assisting the Director in leading/managing the department is an Assistant Finance Director and four managers who work collaboratively with the Director to lead the following five divisions/programs within the Finance Department:

- Administration
- Purchasing and Warehouse
- General Revenue
- Utility Billing
- General Accounting

31 FTE
Employees

\$3.6M
Operating Budget

The Position

This at-will position is a key member of the City Manager's Executive Team and provides day-to-day management of the Finance Department. Key responsibilities of this position include, but are not limited to the following:

- Provide leadership and overall direction to department staff.
- Coordinate the development and administration of the City's annual budget and Capital Improvement Program budget; provide for financial forecasting and planning; track the adopted budget and prepare periodic budget reviews for submission to City departments and City Council.
- Contribute to the overall quality of the department's service by developing, reviewing, and implementing policies and procedures to meet legal requirements and City needs; continuously monitor and evaluate the efficiency and effectiveness of service delivery methods and procedures; assess and monitor the distribution of work, support systems, and internal reporting relationships; identify opportunities for improvement and implement change where needed.
- Establish the City's central budgeting, accounting, and financial reporting practices; evaluate accounting procedures and financial controls; respond to and implement audit recommendations; act as a resource for the Budget Review Committee; ensure compliance with Federal, State, and local government accounting and financial reporting standards and controls.
- Oversee fiscal and cash flow analysis for the cessation of the Successor Agency.
- Manage the City's investment portfolio; ensure that investments meet the City's policy guidelines, and that adequate cash is available to meet obligations; prepare periodic reports regarding investments to the City Council; participate as a member of the Investment Oversight Committee; attend and provide staff support to the Investment Advisory Committee; oversee the development and update of the Statement of Investment Policy.
- Select, supervise, train, and evaluate professional, para-professional, technical, and administrative support staff.
- Coordinate the issuance and administration of debt issues including Certificates of Participation (COP's), Tax Allocation Bonds, assessment district and Community Facilities District (CFD) bonds, and conduit financing; coordinate with the City Manager, appropriate department, bond attorney, financial advisor, and underwriter on new or refunding issues; provide public financial information of debt to rating agencies, brokers, news media, bond holders, and other interested parties.



Challenges & Opportunities

The next Finance Director for the City of Orange will have the chance to experience career-defining opportunities:

- The next Finance Director will have the ability to engineer a supportive, people-focused culture that also features a high level of accountability in the Finance Department. Internal organizational development experience will benefit the next Director.
- Given that there are several collective bargaining agreements expiring in 2023, the next Director will serve an important supporting role to assist in collective bargaining with those labor units.
- The successful candidate will bring a demonstrated track record of staff development and mentoring to assist in the career enrichment of Finance Department staff.
- A fiscally conservative mindset will benefit the next Director in terms of aligning with the City of Orange values and in keeping the City on its fiscally responsible path.
- While the current ERP system utilized by the City of Orange is expected to have 4-5 years of utility remaining, the next Finance Director should have experience in assessing the continued viability of an ERP system and in navigating the implementation of a new system when necessary.





Ideal Candidate

The new Finance Director will have exceptional management, interpersonal, and communication skills, with a hands-on and proactive approach to addressing a broad range of municipal fiscal issues and responsibilities. The successful candidate for this position must value relationships and be an empowering leader who encourages innovation and problem solving while holding people accountable for quality work.

Prioritizing the need for solid leadership and management skills, the City prefers candidates with backgrounds in various areas of municipal finance. Ideally, the new Finance Director will have a career history which features service in communities of similar size and complexity.

Minimum Qualifications

Any combination of training and experience, which would provide the required knowledge, skills, and abilities is qualifying. A typical way to obtain the required qualifications would be:

Education: Bachelor's degree in Finance, Economics, Business or Public Administration, or a related field from an accredited four-year college or university.

Experience: A minimum of seven years of management and/or administrative experience in municipal finance and accounting.

Certification: Certification as a Certified Public Accountant in the State of California is highly desirable.



Compensation & Benefits

The annual salary range for the Finance Director is **up to \$209,232**. Placement within the range is negotiable and dependent upon qualifications (DOQ). The City contributes an **additional 3% on top of salary** which can be taken as cash or placed into a 401A Money Purchase Retirement Plan. Employees with a Master's degree or higher are eligible to receive **\$500 per month of Education Pay** which is reported to the California Public Employees' Retirement System (CalPERS) as pensionable compensation.

The City offers an outstanding benefits package which includes retirement benefits provided by CalPERS. The City of Orange is one of a few cities in Orange County in which an employee who is a Classic Member of CalPERS (or other reciprocal retirement system), will be enrolled in the CalPERS **2.7% @ 55** benefit formula with one-year final compensation. Classic Member employees contribute 8.0% of pension reportable salary on a pre-tax basis for this retirement benefit.

Employees who are new CalPERS members (those obtaining initial membership on or after January 1, 2013), will be enrolled in the CalPERS **2% @ 62** benefit formula with three-year final compensation in accordance with PEPR. New

member employees contribute 6.75% of pension reportable salary on a pre-tax basis for this retirement benefit.

In addition, the City offers a comprehensive benefits package including:

Work Schedule: This position is subject to 9/80 alternate work schedule with City Hall closures every other Friday.

Cafeteria Benefits Plan: The City pays \$2,265 per month which can be applied towards medical, dental, and/or vision insurances. A medical waiver amount of \$750 is offered as cash if proof of comparable medical insurance coverage exists.

Life Insurance: The City provides a term life insurance policy of \$150,000.

Retirement Health Savings Plan: The cash value of certain leave balances will be contributed on a tax-deferred basis to be used for employee medical expenses upon retirement.

Vacation: Executive Directors earn 144 hours of vacation during the first year of service and increasing annually up to 264 hours per year after 30 years of service.

Holidays: The City observes 9½ paid 9-hour fixed holidays and provides 22.5 hours of floating holidays annually.

Administrative Leave: Executive Directors receive 80 hours of administrative leave annually.

Sick Leave: Sick leave is accrued at a rate of 96 hours per year. Employees are eligible to convert unused sick leave to vacation on an annual basis. A partial payment (up to 50%) for accumulated unused sick leave is available to City employees who retire from the City.

Social Security: Employees do not pay into Social Security.

Other Benefits: Long-term Disability, an Employee Assistance Program, Educational Assistance (up to \$1,500/fiscal year), Wellness Reimbursement, Technology Stipend, Trip Reduction Program incentives, optional Deferred Compensation programs, and Credit Union membership are a few of the additional benefits provided or available to employees.

The Recruitment Process

This recruitment will be handled with strict confidentiality. References will not be contacted until mutual interest has been established. Confidential inquiries are welcomed to Bryan Noblett or Greg Nelson at (916) 550-4100.

Interested candidates are encouraged to apply online at www.mosaicpublic.com/careers and should **apply immediately, as this recruitment will close once a sufficiently strong candidate pool has been established.**

The City of Orange is an Equal Opportunity Employer.

To learn more about the City of Orange, visit www.cityoforange.org.

