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**PECKHAM**  
&  
**MCKENNEY**  
EXECUTIVE SEARCH

**Budget Officer**  
CITY OF CONCORD, CALIFORNIA

## THE COMMUNITY

Nestled in the foothills of Mt. Diablo, Concord is a major suburban East Bay community located 29 miles east of San Francisco. Its central location offers easy access to Oakland and San Francisco, the Silicon Valley, the redwoods of Northern California, the wineries of Napa Valley, the rugged coastline of Monterey, and the astonishing beauty of the Sierra Nevada mountain range. Bay Area Rapid Transit (BART) high-speed trains, local bus services, Amtrak, ferries and international airports provide transportation options for residents, commuters and visitors.

As the largest city in Contra Costa County, with approximately 130,000 residents occupying 31 square miles, Concord has much to offer. The local lifestyle reflects a careful blending of the city's early California heritage with modern planned development. It is a harmonious community of quiet neighborhoods, an excellent park system, convenient shopping centers, large preserves of open space, a state-of-the-art hospital, and a wide variety of restaurants.

Concord enjoys a Mediterranean climate with warm dry summers and mild winters. The perfect weather and natural beauty makes the area ideal for visitors and residents seeking active outdoor activities. In Concord one is never far from an open green space for active play or just relaxing. The extensive park system includes 27 parks, playgrounds, ball fields, swimming pools, picnic areas, tennis courts and miles of scenic hiking, biking and equestrian trails, a golf course, two community centers, a senior center and a water park.

Concord also has an exciting downtown business core that radiates from historic Todos Santos Plaza, the heart of downtown Concord. Dedicated to the people of Concord in 1868 by founder Salvio Pacheco as a social gathering place, Todos Santos Plaza features a year-round Farmer's Market, free summer concerts and community celebrations. The surrounding streets offer more than 40 restaurants, various shops and services, convenient office space, free parking, easy access to BART and the 14-screen Brenden Theatres.

The city where "Families Come First," Concord fosters a high quality of life for all ages.

The well-respected Condé Nast Traveler magazine listed Concord as one of the ten Best Places in the World to Retire, and called Concord "a big little city, home to excellent health care facilities, free community activities with a desirable proximity to San Francisco and a relatively low crime rate." Concord also has been recognized as the Best Place in California to Raise a Family, awarded Best Music Scene by Livability.com, and has been designated a Tree City USA for 34 consecutive years.

To learn more about the City of Concord, please visit [www.cityofconcord.org](http://www.cityofconcord.org)

## THE ORGANIZATION

Concord is a General Law city with a City Council/City Manager form of government. The City

Council also serves as the Board of Directors of the Concord/Pleasant Hill Health Care District (CPPHCD), the Board of the Local Reuse Authority, and as the Successor Agency Oversight Board of the former Redevelopment Agency. The City's General Fund budget for FY 2016-17 is \$94.3 million. The two-year Capital budget for 2016-2018 is \$32.4 million.

City Manager Valerie J. Barone oversees a staff of 408 full-time employees. Concord provides a full range of services including: police protection, recreational activities, community and economic development, street improvements and maintenance services, parks maintenance, sewer, and general administrative and support services. Fire service is provided by the Contra Costa County Fire Protection District. In addition, the City oversees management of the Concord Pavilion, Diablo Creek Golf Course and Camp Concord in South Lake Tahoe, California.

Concord's fiscal outlook has improved significantly since the Great Recession. Unemployment rates are declining, retail and auto sales are growing, property values have returned to pre-recession levels and the City once again has 30 percent in reserves. Measure Q, a voter-approved half-cent use and transaction tax intended to temporarily cover the gap between expenditures and regular revenue sources, has aided the City in providing essential city services. The measure was approved by voters in November 2010 for 5 years, and extended by voters in 2014. Measure Q will expire on March 31, 2025. Despite the City's brightening economic situation, there still are challenges for the future. These include rising costs for employee benefits, rising salary costs, the lack of adequate funding for infrastructure maintenance, decreasing support from the State for maintenance, decreasing gas tax funding, increasing stormwater costs and a need to eliminate reliance on Measure Q by 2025.

## FINANCE DEPARTMENT

The Finance Department has all of the traditional responsibilities of municipal finance including budget development and oversight, accounting, financial planning and reporting, auditing, accounts payable/receivable, payroll, purchasing, as well as revenue and debt management. The Finance Department is supported by a staff of 18 and is led by Director of Finance Ms. Karan Reid.

Since 2013 the City Council has adopted priority areas of focus which guide staff's allocation of resources. In 2016 the City Council confirmed and refined the following five Priority Areas of Focus and two areas of Constant Focus: Long Term Financial Stability, Economic Development, Infrastructure Maintenance, Organizational Strength and Employee Success, and Public Safety. The two areas of Constant Focus are Customer Service and Quality of Life.

## THE POSITION

The purpose of the Budget Officer position is to develop, prepare, and coordinate the two-year City-wide budget and the ten-year financial documents and to recommend financial policies and procedures to ensure compliance with City Council adopted fiscal initiatives, programs and objectives. In addition, the position supports the development of the City's two-year Capital budget.

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The Budget Officer reports directly to the Director of Finance, yet also works with and maintains a close working relationship with the City Manager. The City has a solid reputation for having a strong team orientation and a collaborative working environment.



## THE IDEAL CANDIDATE

In meetings with Department and City representatives, the following Key Qualities were identified:

**SHARED VISION:** The new Budget Officer will embrace, promote and be guided by the City's Mission, Vision, and Values.

**LEADERSHIP:** He/she will be someone who asserts a positive presence, takes the initiative, shows good judgment, treats others with respect, and nurtures these qualities in staff.

**PROBLEM SOLVER:** She/he will be proactive in anticipating problems, will seek to understand the issues, and will work for the best overall resolution which meets all stakeholder needs.

**RELATIONSHIP BUILDER:** The new Budget Officer will cultivate positive relationships both within and outside the organization and will represent what is best in the Finance Department.

**PEOPLE MANAGEMENT SKILLS:** He/she will be someone who nurtures the growth and progress of staff within the department and reinforces accountability and actively solves personnel problems. The next Budget Officer will recognize peoples' potential and will provide the stimulus necessary to see this potential realized, and will celebrate achievements and successes with staff. An appropriate sense of humor and the ability to enhance the team environment is also a quality the City is looking for.

**BUDGET MANAGEMENT SKILLS:** The new Budget Officer will see the big picture goals of budget development for the City as a whole, and will recognize the complexity of same and the need for accuracy.

**INNOVATIVE:** She/he will be someone who develops and supports innovation both within the Finance Department and insures that innovation proposed throughout the organization is underpinned with solid financial information. The ability to assess and streamline processes is also desired.

**TEAM PLAYER:** He/she will be someone willing to function as a collaborative and supportive member of the City-wide organization team and will reinforce that value within the Department.

**ETHICAL:** She/he will set and maintain high standards of conduct for both themselves and for staff, will be willing to make tough decisions with the emphasis on what is right despite pressure to focus on what is expedient.

**FLEXIBILITY:** The next Budget Officer will have the ability to provide support to others while keeping key financial requirements and timelines



in mind. He/she will be able to multi-task and work in a fast paced, ever changing environment.

The following Key Qualifications were also identified:

The new Budget Officer will have experience in developing and administering complex budgets and the ability to work with complex financial accounting systems. A strong command of technology, the ability to design budgetary programs that meet the needs of a fiscal environment that is in a constant state of flux, and the ability to analyze complex financial issues and develop long-term projections are all required. She/he will display a high comfort level interacting with and presenting to a variety of audiences and will have the ability to explain complex financial data in understandable layperson's terms.

He/she will manage both professional and technical staff and will have direct experience in personnel matters including, but not limited to, hiring, evaluations, and disciplinary actions. The next Budget Officer will have excellent oral and written communication skills and will be a strong team member that looks for solutions that meet the needs of both the customer and the Finance team.

Lastly, the next Budget Officer will have demonstrated experience producing budget documents that meet GFOA and CSMFO standards and will have experience developing and monitoring budgets with multiple funds.

Although technical skills are critical for this opportunity, so are excellent interpersonal

skills. The ability to successfully team with others in accomplishing complex tasks will be a determining factor in the next Budget Officer's long-term success.

Any combination equivalent to the experience and education that would likely provide the relevant knowledge and abilities would be qualifying. Generally, this will require six years of experience in finance, budgeting, or accounting, which includes at least two years as a Financial Analyst or Senior Administrative Analyst for a major department or equivalent. A Bachelor's degree in public or business administration, accounting, or related field is also required. A Master's degree and/or a CPA license is highly desirable and experience serving a municipality will be considered favorably.

## THE COMPENSATION

The annual salary range for this Budget Officer opportunity is from \$110,052 to \$151,320 and is supplemented by an attractive benefits package that includes, but is not limited to: PERS Health; Dental and Vision; Retirement (2% at 55 for current members, 2% at 62 for new members); generous Vacation and Sick Leave; Administrative Leave; Deferred Comp; Short/Long Term Disability; Employee Assistance Plan; Life Insurance; Pre-Tax Savings Benefits; and the City does participate in the Federal Social Security and Medicare programs.



## SEARCH SCHEDULE

Filing Deadline ..... April 26, 2017  
Preliminary Interviews..... April 28 through May 15, 2017  
Recommendation of Candidates ..... May 17, 2017  
Finalist Interview Process ..... May 31, 2017

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 send your resume and cover letter electronically to:

**Peckham & McKenney**

[apply@peckhamandmckenney.com](mailto:apply@peckhamandmckenney.com)

Resumes are acknowledged within two business days. Call Phil McKenney toll-free at (866) 912-1919 for more information.



[www.peckhamandmckenney.com](http://www.peckhamandmckenney.com)