

Kathy Chang

Cell: [REDACTED]

Email: [REDACTED]

August 4, 2019

Contra Costa County Boards and Commission,

I am interested in serving the Regional Measure 3 Independent Oversight Committee. I have more than 20 years of experience in local government finance, including grant administration. In retirement, I want to continue to contribute to civil services from a different perspective.

The following is an overview of my work experience:

I was the Finance Manager of two local government agencies from May 2013 to November 2018: Delta Diablo in Antioch and Scotts Valley Water District in Scotts Valley. Primary responsibilities included but not limited to financial operations, annual budget, annual audits, CAFR and other financial reports, investment, debt management, grants, utility billing, fee/rate study, customer service, ERP system administration, and supervising 2.5 to 5.0 FTE positions.

Additional employment history included Principal Financial Analyst in the City of Santa Clara for 3 years and Principal Budget Analyst in the City of Santa Monica for 9 years. In both cities, I coordinated and prepared the annual operating and capital budgets, General Fund 5-year forecast, mid-year and year-end budget reviews, special projects and various studies. I supervised two analysts in the City of Santa Monica. More details can be found in the resume following the letter.

I am committed to bringing leadership, financial stewardship and oversight to the Contra Costa County Boards and Commissions. Thank you.

Truly yours,

[REDACTED]

Kathy Chang, CPA

I strive for fiscal transparency, accountability, excellence and stewardship.

Kathy Chang, CPA

Career Experience

Delta Diablo District, March 2018 – November 2018

Finance Manager

Primary responsibilities included annual budget, financial audits, CAFR, financial operations, investment, parcel data administration, Tyler Munis system administration, agenda reports, Finance Committee and full board meetings, purchasing, supervising 5.0 FTE positions, special projects, etc.

Scotts Valley Water District, May 2013 – March 2018

Finance Manager /Interim Finance Manager (for the first three months)

Manager of the Finance Department with primary responsibilities in financial operations and customer service, annual audit and financial reporting, comprehensive fee/rate study, annual work plan, monthly Finance Committee meetings, annual budget, cash receipts and disbursements, payroll processing, investment, debt management, grants, regulatory reports, etc. Supervise 2.5 FTE positions.

Accomplishments:

- Collaborated with other executive team members to: revamp the Administrative Codes, modernizing District operations; conduct a comprehensive fee/rate study and successfully complete the Prop 218 process, achieving fiscal sustainability; and work with a debt refunding team to refund two debts with a fixed rate loan, saving \$700,000 in net present value
- Transformed the Division from a manual paper pushing operation to a highly automated one embracing technology and best business practices with a successful implementation of a new financial management system
- Mentored and transitioned staff to more value added tasks and fostered team work and team spirit in a fast changing environment

City of Santa Clara, March, 2010 – May, 2013

Principal Financial Analyst

Primary responsibilities included but were not limited to planning, coordinating, developing and/or preparing annual Operating and CIP budgets, five-year forecast, year-end budget review, budget debriefings for future improvements, property and liability insurance programs, MOU costing for labor negotiations and special projects. Project manager for the cost allocation plan and implementation of a new budgeting system.

Accomplishments:

- Implemented process and efficiency improvements to streamline the 2011-12 and 2012-13 budget processes, and revamped the Operating and CIP budget instructions for the 2011-12 budget
- Provided leadership and guidance to citywide departments throughout the annual Operating and CIP budget processes. Won accolades for excellent customer and financial services.
- Successfully completed the 2012-13 Cost Allocation Plan updates in time for the 2013-14 Operating Budget preparations; successfully completed the high level architecture design and the fit/gap analysis for the Hyperion Budgeting System upgrades.

City of Santa Monica, February, 2001 – March, 2010

Principal Budget Analyst

The role of the Principal Budget Analyst had changed significantly as the budget office evolved during a period of three City Managers and three Finance Directors. Responsibilities over the years included: saw to the annual budget process, supervised two senior budget analysts, conducted citywide budget training, led the mid-year and year-end budget review preparations, recommended the 5-year forecast assumptions, prepared the general fund 5-year expenditure forecast, reviewed the bi-weekly Council staff reports for budget and financial impacts, monitored budget vs. actual for all City funds during the year and at year-end and worked on special projects.

Key Achievements:

- Gradually took over the budget preparation, coordination and analytical responsibilities previously assumed by Finance Director and/or Budget Manager.
- Brought the annual operating budget document to be a GFOA award winner since FY 2004-05.
- Standardized the five-year expenditure forecast methodology and conducted sensitivity analysis using various economic scenarios.

City of Santa Monica

Senior Administrative Analyst-Budget (2000 – 2001)

Acting Senior Administrative Analyst-Budget (1998-2000)

Analyzed budget issues pertaining to assigned departments and provided recommendations to department directors and the City Manager’s Office for decision-making. Participated in the annual budget preparation, mid-year and year-end budget review preparation and the ICMA performance measurement templates review. Assisted in special projects.

CERTIFICATE AND EDUCATION

Member of Arizona Society of Certified Public Accountants since 1998 (10828-E)

Master of Science in Accounting

University of Oregon – Eugene, Oregon

Bachelor of Arts in Business Administration

National Chung Hsing University, Taipei, Taiwan

Summary of Qualifications

Experience: Extensive experience in special district and municipal finance in leadership roles with strengths in financial operations, annual budget preparations, interdepartmental coordination, process and efficiency improvements, communication and interpersonal skills. Core competences include:

- Leadership and management skills
- Financial and treasury operations
- Annual audit and financial reporting
- Fiscal policies, rules and regulations
- Operating and CIP budget preparations and budget balancing strategies
- 5-year Forecast
- GAAP and GASB
- Rate study and implementations
- Debt administration
- Special projects
- Agenda reports
- Risk management and insurance programs

Skills: Analytical, resourceful, problem solving, customer service oriented, computer literate (Office 365, Springbrook, Tyler Munis, JDE One World and PeopleSoft), goal and task driven, planning, coordinating and excellent verbal and written communication skills.