



Contra Costa County

Please return completed applications to:

Clerk of the Board of Supervisors
651 Pine St., Room 106
Martinez, CA 94553

or email to: ClerkofTheBoard@cob.cccounty.us

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

First Name: Katherine, Last Name: Chang, Home Address - Street, City: Antioch, Zip Code: 94531, Phone, Email, Resident of Supervisorial District: Ms. Burgis

EDUCATION Check appropriate box if you possess one of the following: High School Diploma, CA High School Proficiency Certificate, G.E.D. Certificate

Table with 3 columns: Colleges or Universities Attended, Course of Study/Major, Degree Awarded. Includes University of Oregon and National Chung Hsing Univ.

Other Training Completed: CPA (retired) certificate in the State of AZ

Board, Committee or Commission Name, Seat Name

Have you ever attended a meeting of the advisory board for which you are applying? No, Yes, If yes, how many?

Please explain why you would like to serve on this particular board, committee, or commission. I have had more than 20 years of municipal government finance experience...

Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application) Among other duties, I was in charge of treasury functions as a finance manager in the last 5 years of my employment...

I am including my resume with this application: Please check one: Yes, No

I would like to be considered for appointment to other advisory bodies for which I may be qualified. Please check one: Yes, No

Are you currently or have you ever been appointed to a Contra Costa County advisory board?

Please check one:  Yes  No

List any volunteer and community experience, including any boards on which you have served.

Regional Measure 3 Independent Oversight Committee

Do you have a familial relationship with a member of the Board of Supervisors? (Please refer to the relationships listed below or Resolution no. 2011/55)

Please check one:  Yes  No

If Yes, please identify the nature of the relationship:

Do you have any financial relationships with the county, such as grants, contracts, or other economic relationships?

Please check one:  Yes  No

If Yes, please identify the nature of the relationship:

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publicly accessible. I understand and agree that misstatements and/or omissions of material fact may cause forfeiture of my appointment, or commission in Contra Costa County.

Signed: \_\_\_\_\_ Date: 11/1/2019  
Su \_\_\_\_\_  
k of the Board of Supervisors  
651 Pine St., Room 106  
Martinez, CA 94553

Questions about this application? Contact the Clerk of the Board at (925) 335-1900 or by email at ClerkofTheBoard@cob.cccounty.us

**Important Information**

1. This application and any attachments you provide to it is a public document and is subject to the California Public Records Act (CA Government Code §6250-6270).
2. All members of appointed bodies are required to take the advisory body training provided by Contra Costa County.
3. Members of certain boards, commissions, and committees may be required to: 1) file a Statement of Economic Interest Form also known as a Form 700, and 2) complete the State Ethics Training Course as required by AB 1234.
4. Meetings may be held in various locations and some locations may not be accessible by public transportation.
5. Meeting dates and times are subject to change and may occur up to two (2) days per month.
6. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.
7. As indicated in Board Resolution 2011/55, a person will not be eligible for appointment if he/she is related to a Board of Supervisors member in any of the following relationships: mother, father, son, daughter, brother, sister, grandmother, grandfather, grandson, granddaughter, great-grandfather, great-grandmother, aunt, uncle, nephew, niece, great-grandson, great-granddaughter, first-cousin, husband, wife, father-in-law, mother-in-law, daughter-in-law, stepson, stepdaughter, sister-in-law, brother-in-law, spouse's grandmother, spouse's grandfather, spouse's granddaughter, and spouses' grandson, registered domestic partner, relatives of a registered domestic partner as listed above.
8. A person will not be eligible to serve if the person shares a financial interest as defined in Government Code §87103 with a Board of Supervisors Member.

Kathy Chang  
Cell:  
Email:

November 1, 2019

Contra Costa County Boards and Commissions,

I am interested in serving the Treasury Oversight Committee. I have more than 20 years of experience in local government finance, including treasury and investment among other responsibilities. 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,

Kathy Chang

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

# **Kathy Chang, CPA (retired)**

, Antioch, CA 94531

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## **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

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**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.