

# FINANCE DIRECTOR

WAUKESHA, WISCONSIN



EXECUTIVE RECRUITMENT



## POSITION IN BRIEF

The Finance Director is a key member of the City's management team in a financially stable organization, and reports to the City Administrator. The Finance Director oversees a department of eight employees and performs complex work involving fiscal planning, internal audit and budgetary controls, and cost studies. In concert with the City Administrator, the Director develops and manages combined general and enterprise fund budgets of approximately \$100 million.

## THE COMMUNITY

The City of Waukesha, with a population of 71,158, has a strong identity as a full-service, independent community located 15 miles west of Milwaukee, Wisconsin along the shores of the Fox River. Waukesha is an award winning community named one of the "100 Best Communities for Young People", "One of the Best 100 Places to Live" (Money Magazine), and the recipient of the prestigious Gold Medal Award by the National Recreation and Park Association.

Waukesha is the seventh largest city in the state with a daytime population of approximately 100,000 people. It is located in one of the fastest growing and wealthiest counties in Wisconsin and its commercial and residential boom is expected to continue.

The City has a thriving historic downtown boasting concerts, a farmer's market, scenic Riverwalk and festivals. The location on the river, historic buildings, and strong artist culture all contribute to the unique character of the City. Waukesha also includes great neighborhoods, excellent schools, and an award winning park system with recreation programs for the whole family.

There are 31,280 households in Waukesha. A wide variety of housing sizes, styles and price ranges are available throughout the community from older structures to new construction home sites. The median household income is \$65,688; median home values, per market reports, are approximately \$310,000. Waukesha's population is approximately 84% white, 12% Hispanic and

4% African American. The neighboring City of Milwaukee has more than 600,000 residents, and the Milwaukee Metropolitan Statistical Area has a population of more than 1.5 million.

Education is a top priority for the Waukesha community. There are excellent public and private schools from K through 12 in the City. The City is home to the state's oldest college, Carroll University (est. 1848), and the University of Wisconsin-Milwaukee (Waukesha Campus) The City is also served by Waukesha Technical College immediately adjacent to the City. The greater Milwaukee area offers a wide variety of higher education opportunities. Chief among them include the University of Wisconsin – Milwaukee and Marquette University.

Diverse recreational opportunities abound in Waukesha and the surrounding area. The City manages 45 parks and 1,100 acres of open land. There are hundreds of miles of biking and hiking trails in and around the City. Waukesha is within minutes of the Kettle Moraine State Forest. There are 12 golf courses and 77 lakes within the County. Waukesha hosts a lively arts community ranging from the Wisconsin Philharmonic and Waukesha Civic Theatre to the Waukesha Choral Union and free summer concerts at the Les Paul Band shell.

Read more about the city [using this link](#).

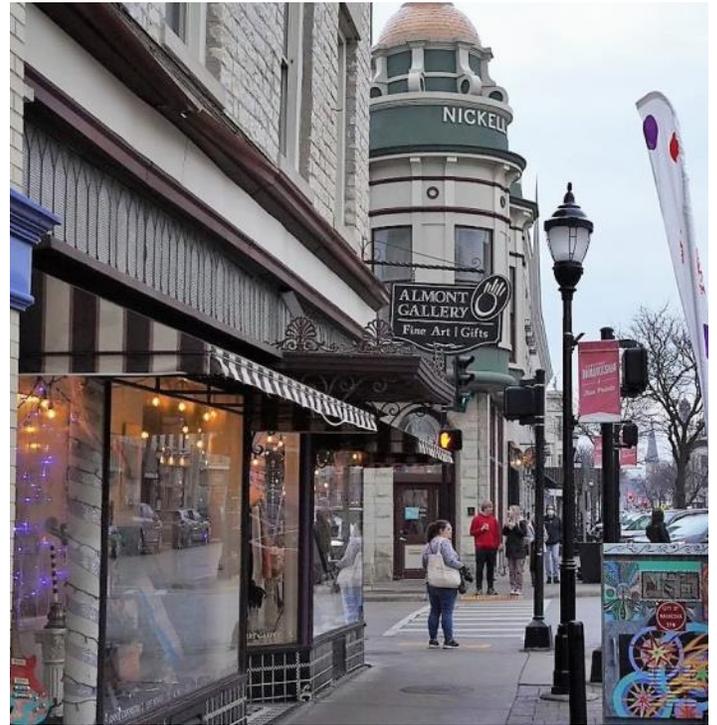


## CITY GOVERNMENT

The City of Waukesha is an independent, full-service municipality governed by a Mayor elected at large and a 15-member Common Council, each elected by district. The Mayor serves as the City's chief executive officer. The Common Council, through standing committees, provides policy oversight of City activities, services, and programs.

An appointed City Administrator is responsible for administering the day-to-day operations of the City, providing leadership and direction to the City's management staff which include the Police Chief, Fire Chief, Assessor, City Clerk/Treasurer, Public Works Director, Community Development Director, Finance Director, Library Director, Director of Information Services, Cemetery Director, Parks, Recreation and Forestry Director and Human Resources Director. The City also has an elected City Attorney and Municipal Judge.

The Finance Director is appointed by the City Administrator with consent and approval by the Common Council. The City Administrator has been in his position for seven years. The city's elected officials and management team enjoy strong and mutually respectful work relationships.



## WAUKESHA FINANCE DEPARTMENT

The Director oversees a department consisting of a senior financial and accounting administrator, a senior accountant, two accountants, a financial projects accountant, a finance analyst and an account clerk. The department is responsible for all budget and finance related functions including accounts payable (about 15,000 invoices annually), insurance claim processing, budget coordination and financial reporting. The department's FY 2022 budget was \$947,000. The department works closely with the Clerk/Treasurer whose office handles accounts receivable, tax billing and collections, and licensing.

The Finance Director is a key member of the City's management team in a financially stable organization. The city maintains an AA2 bond rating from Moody's Investor Services, and has earned the Government Finance Officers Association (GFOA) Award for Financial Reporting. In concert with the City Administrator, the Director develops and manages a general fund budget of approximately \$72 million and a combined general fund and enterprise fund budget of approximately \$100 million.

The city's fiscal year begins January 1<sup>st</sup>. [The FY 2022 budget can be found online.](#)

[The most recent Comprehensive Annual Financial Report can be found here.](#)

## CHALLENGES & OPPORTUNITIES

The Director can expect to work closely with the City Administrator and the City's senior staff team on the following:

- The City is in good financial shape as evidenced by a strong bond rating and a healthy unassigned fund balance of about 28%. In response to the COVID-19 Pandemic, the city established the Waukesha Works Economic Recovery Grant program. The grant program assisted small businesses with 20 or fewer full-time equivalent employees that were adversely impacted by the COVID-19. The program distributed nearly \$500,000 for rent, mortgage, and utility bill assistance; assistance for additional marketing, advertising, signage, special equipment and supplies; and a 50% match for capital improvement projects.
- The City Administrator welcomes the next Finance Director taking a fresh look at processes, structures, and approaches to the Department's delivery of its services and reporting. In particular need of attention is an update to the city's financial policies. Also important is increasing the level of online transparency and accessibility, all with an eye toward enhancing the public's understanding and fluency about how, why and where the city spends taxpayer funds.
- The Finance Director, in partnership with the City Administrator, plays a significant role in the development of the City's \$72 million budget. The new Director can expect to be a leader in this area, working with a host of elected and city staff stakeholders, to assure that the budgeting priorities reflect the City's strategic interests and financial realities.
- In addition, the city currently has 14 tax incremental financing districts, and financial oversight of the districts rests with the Finance Department's staff. Providing leadership in this area – appreciating that TIDs are not simply dollar signs but instead reflect partnerships with the city's development community – will require an adept hand on the part of the Director and his or her finance team.
- In late 2018 the Common Council adopted a [Strategic Plan](#) to serve as a road map for the City's future, one that helps to establish goals, objectives and strategies to make significant and measurable improvements. The implementation of this plan is reflected in the various policies adopted by the Common Council and is embodied in the City's budget, Community Investment Plan (CIP), Master Plan, and department level strategic initiatives. Some of the strategic plan's focus areas, as it relates to the City's financial condition and the Finance Department, include being:
  - Well managed and financially sound – Develop fiscally sound financial policies and effectively manage public resources within budgetary limits. Be a good steward of public finances, continually seeking more efficient, cost effective ways to provide services;
  - Customer focused – Provide prompt and responsive service with a caring attitude;
  - Economically strong and diverse – Use strategies and policies that are forward thinking to retain and expand existing businesses, attract new businesses and high-quality jobs, and promote quality redevelopment.
- Accordingly, the next Finance Director can expect to work with the City Administrator and other members of the management team to advance work on the plan's financial objectives and strategies.
- Like many older Midwestern cities, infrastructure and capital improvements are always the stock of attention, and in Waukesha a robust list of projects are underway or under consideration. For instance, a new city hall was completed in February of 2021. The new facility, at approximately \$20 million, replaces a mid-1960s city hall and annex building. The City also completed a \$8.5 million redevelopment of the city's Buchner Pool, an outdoor aquatic and community center. The city's conversion from a community well system to Lake Michigan water won federal, state and other agency approvals and, after more than a decade jumping those hurdles, is now constructing a nearly \$300 million project. As a result, the next Director can expect high-level involvement in the on-going development of capital projects and infrastructure planning.
- The Department's staff includes a mix of employees, some with considerable experience, others are recent hires. Compared to other municipalities its size, the staff is lean; a number of functions are handled by other City departments such as the Clerk/Treasurer, requiring a collaborative approach. In working with the City's 15 departments as an internal service provider, the Finance Director can expect to lead and work closely with the finance team by developing, mentoring and delegating to a talented staff that is eager to taking on new challenges and responsibilities.





## CANDIDATE QUALIFICATION CRITERIA

The following education, experience, management, and leadership criteria have been identified by the City's management team as important skills and abilities for candidates to possess and demonstrate:

### EDUCATION AND EXPERIENCE

- A Bachelor's degree in accounting, finance, economics, business administration or related field; a Master's degree and/or CPA is ideal, but not required.
- At least seven years of experience in a government setting or demonstrable skills in governmental fund accounting.
- Working knowledge of financial management/ERP systems.
- Supervisory experience.
- Have a thorough knowledge of municipal accounting, budgeting, auditing, purchasing, debt management, and internal controls. Be detailed-oriented, while possessing the ability to keep an eye on the City's bigger picture and strategic initiatives.
- Knowledge of generally accepted accounting principles and GASB fluency.
- Have a commitment to keeping abreast of changes and emerging issues with respect to municipal finance.
- Be knowledgeable in alternatives for capital improvement financing; have an understanding about the issuance of debt instruments for capital improvements and economic/community development.
- Possess a strong ability to evaluate revenue sources with a goal of increasing and diversifying revenue income; be knowledgeable on emerging trends in alternative revenue sources.
- Have knowledge of financial application software as it affects the Finance Department and related City Departments including ERP and HRIS systems.
- Provide comprehensive and understandable financial information to the City Administrator, and other stakeholders ensuring that the very best, complete, and accurate information is made available to all on a timely basis.

### MANAGEMENT STYLE/PERSONAL TRAITS

- Have complete personal and professional integrity, gaining respect and inspiring the trust and confidence of subordinates, co-workers, and elected and appointed officials, as well as the general public.
- Be a clear and concise communicator, including the ability to actively listen.
- Be a collaborative and decisive leader, one who has the ability to distill information and ideas from a variety of sources and make timely decisions.
- Be able to present complex technical information to any audience in a manner that is understandable and jargon-free.
- Have a genuine passion for public service from both an internal, department standpoint and for service to the community; be devoted to customer, community and departmental service.
- Be creative in solving problems, encouraging and empowering employees to find new and better ways to get work done, while also applying, maintaining and respecting the regulatory framework that guides the delivery of municipal services.
- Be a positive and flexible team builder who is committed to the well-being of the staff; be a manager who both defends his/her staff when appropriate, and holds the team accountable.
- Have an open, friendly personality and communication style and a calm demeanor; be one who can establish trust quickly with others. Have a sense of humor when appropriate to the circumstances.
- Be proactive and willing to keep the City Administrator and Common Council apprised of the state of the City's finances, major activities and/or operations of the Department in a consistent and timely manner, passing on both good news and bad news in a tactful, self-confident and professional manner. City's finances, major activities and/or operations of the Department in a consistent and timely manner, passing on both good news and bad news in a tactful, self-confident and professional manner.



## COMPENSATION AND BENEFITS

The Finance Director is appointed by the City Administrator with approval of the Mayor and Common Council. The starting salary range is \$130,000 +/- DOQ, plus exceptional benefits.

## HOW TO APPLY

Candidates should apply by April 29, 2022 (Open until filled) with resume, cover letter and contact information for five work-related references to [www.GovHRjobs.com](http://www.GovHRjobs.com) to the attention of:

Lee Szymborski, Senior Vice President  
GovHR USA  
630 Dundee Road, #225  
Northbrook, IL 60062  
Tel: 847-380-3240

**The City of Waukesha is an Equal Opportunity Employer.**



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