NAME

CITY • PHONE • EMAIL

CHIEF FINANCIAL OFFICER

DELIVERING SOUND FINANCIAL MANAGEMENT & GUIDANCE THAT DRIVES PROFITABILITY & ENHANCED PERFORMANCE

Solutions-driven, versatile and proactive executive with a career track comprised of roles of increasing responsibility within the public sector. Offers a strong work ethic with the ability to partner with C-level executives, internal departments and external constituents to achieve the bottom-line financial goals and objectives of the organization. Leads by example, develops staff from within and heads production efforts to mentor future leaders. Takes pride in ownership and approaches challenges with outside-of-the-box thinking and hands-on contributions that result in measurable wins for the organization.

- ✓ Highly adept at making key decisions within politically charged environments.
- ✓ Noteworthy accomplishment includes the effective management of $8B+ of assessment data to support the taxation efforts of a local municipality.
- ✓ Critical thinker who quickly identifies gaps and refines processes to produce tangible results for today's public service departments.

CORE COMPETENCIES

- Team Leadership & Development
- Strategic & Tactical Planning
- Finance Management & Budgeting
- Data Analysis & Reporting
- Internal Controls & Audits
- Performance Analysis & Metrics
- Change Management
- Forecasting & Risk Assessments
- Resource Allocation
- Growth Planning
- Municipal & State Government Operations
- Regulatory Compliance
- Purchasing & Procurement

AWARDS AND HONORS

★ Award from former Indiana Governor Mitch Daniels (R) on Indiana Self-Disclosure reform efforts ★
★ 2018 Leaders under 40 award- Mayor Pete Buttigieg ★
★ 2019 Key to the City of South Bend- Mayor Buttigieg ★

PROFESSIONAL EXPERIENCE

COMPANY • CITY • *Company oversees performance in schools across the district, meeting the educational needs of 16,725 students and employing 1,273 teachers.*

Chief Financial Officer (2019-Present)

Provides sound management and administration of the school board's financial services activities, including oversight of the annual budget. Partners with administrators to formulate district policies, procedures and standards. Ensures appropriate resource allocation to support student learning, engagement and activities across all schools within this public education system.

- *Analyzes financial and statistical data, makes appropriate projections and fuels the decision-making process to improve operations.*
- *Actively participates in financial statement preparation, analysis, forecasting, budgeting, and working capital management processes.*
- *Advises district administrators on financial, procedural and other program changes, and their implications as pertains to laws, standards, the mission, and vision of the corporation.*
- *Demonstrates subject matter expertise when presenting information to the board and executive staff on complex financial issues including changes to laws, collective bargaining negotiations and investments.*

SHE ASSISTS

COMPANY • CITY • *The City of XYZ's Executive Office of the City Clerk is responsible for attendance and accurate journaling of all regular and special meetings and proceedings impacting a city that supports over 101,000 residents.*

City Clerk (2015-2019)

Elected as the 22nd City Clerk of XYZ, the second-highest elected position in the City. Managed both City and Common Council duties including management of the city's budgeting process.

- *Maintained accurate recordkeeping for all public meetings and proceedings; served as a liaison between residents and city government by managing the end-to-end legislative process.*
- *Demonstrated both broad and specialized knowledge of state and municipal government processes, laws and procedures.*
- *Attended budget hearings and managed submission of budgets for review to the Department of Local Government Finance.*
- *Dually served as the City Archivist with responsibilities for stewardship of the City Municipal Code, the City Seal and the City Charter.*
- *Served a pivotal role towards the city achieving recognition with the "Government Finance Officers Association (GFOA) Distinguished Budget Presentation Award" for three years consecutively.*

Chief Deputy City Clerk (2010-2015)

Held an array of fiscal responsibilities for both the City Clerk's Office and the Common Council. Accurately prepared the annual budget, oversaw procurement, vendor relations, and human resources duties including staff recruitment.

- *Led and directed staff, set priorities, defined workflows, delegated assignments, and established objectives.*
- *Identified gaps in processes, authored and administered new policies and procedures to streamline daily operations.*
- *Hired, trained and developed the skills of staff; evaluated performance, maintained discipline and facilitated terminations where required.*
- *Delivered additional leadership and insight as a core member of the Governance, Wellness and ERP Implementation Boards.*

COMPANY • CITY • *The XYZ's Office is one of four in the state that determines the value of all taxable property—land, residential, and commercial—in the county, serving a population of approximately 268,000 people across 458 square miles of territory.*

Chief Compliance Officer (2001 to 2010)

In this highly visible leadership role, analyzed and managed over $8B worth of property assessment data.

- *Successfully redesigned and consolidated 13 individual township assessor offices into two offices as per a newly passed State referendum mandating this change.*
- *Recognized the need for process improvements; achieved buy-in and managed the successful migration of legacy system data into an upgraded system.*
- *Introduced and recommended the use of the newly implemented Indiana Gateway System; consulted on the Federal Sales Disclosure reform to further improve processes.*

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EDUCATION

UNIVERSITY • Bachelor of Business Administration & Organizational Management, Minor in Public Service

UNIVERSITY • Executive Indiana Certified Public Administration

UNIVERSITY • Indiana Level II Assessor/Appraiser

PROFESSIONAL AFFILIATIONS

INTERNATIONAL ASSOCIATION OF MUNICIPAL CLERKS • Member

COMMUNITY AND CIVIC INOVELEMENT

- *Public servant/official*
- *St. Joseph County MLK Steering Committee*
- *Delegate for American Council of Young Political Leaders representing the United States of America in South Asia (2017)*
- *Chair of the 2016 Indiana Democratic Party Resolutions Committee*
- *Charter Member of 100 Black Women*
- *Graduate of Emerging Leaders Project (2015)*
- *Graduate of the Michiana Chamber of Commerce Leadership Program XLI (Class 41)*
- *Indiana Election Delegate for St. Joseph County (present)*
- *Central Committee Member and Deputy Chair of the St. Joseph County Democratic Party*
- *Co- Founder of the St. Joseph County African American Coalition*
- *Vice President of (IDACC) Indiana African American Caucus*
- *SBCSC IT Governance Committee*
- *2018 Community Chair of the 1st Annual IDEA WEEK, ND IDEA CENTER including Judge for University of Notre Dame, McClosey New Venture Competition// IDEA Center*
- *2020 Surrogate, Pete for America Presidential Campaign*

BOARD MEMBERSHIPS

- *Board Member of the City of South Bend Minority Business Entrepreneurs/Women's Business Entrepreneurs Diversity and Inclusion Board, 2011- Present*
- *St. Margaret's House Board Member, 2016-Present*
- *Board Member of the City of South Bend Wellness Council, 2015-Present*
- *Board Member of the City of South Bend WorkSmart Team, Office of Sustainability, 2015-Present*
- *Board Member of the Shirley Heinze Land Trust, 2017-Present*
- *Board Member of the Emerging Leaders Project, 2016-Present*
- *Board Member of the South Bend Civic Theatre, 2018-Present*
- *Board Member of the Impact Committee at Mount Carmel*
- *Board Member of the Notre Dame Federal Credit Union*
- *Women's Advisory Board Habitat for Humanity/ Jimmy Charter Project*

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