

January 1998

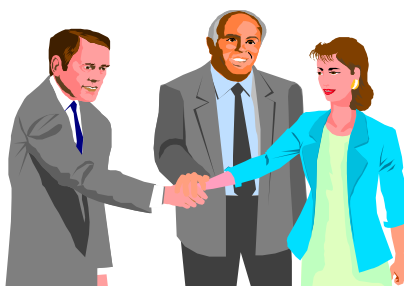
President's Message

Zenda James, Director of Finance, Alameda

Happy New Year!!! A new year is exciting in that it is similar to starting a new painting, a new canvas. It is as if the slate has been wiped clean and it is up to us to create the new picture. I am confident that whatever challenges may face us, we are up to the challenge.

Speaking of challenges, an Ocean of Opportunities is being planned for us at the February 1998 seminar in Newport Beach. Hopefully most of you will take advantage of the discounted registration fee. Also, please be sure to return your preliminary agenda after you've checked off the sessions you plan to attend at the seminar so the room assignments can be planned accordingly. At noon on Sunday, February 22, the chapter chairs plus four members from their respective chapters will discuss the future direction for CSMFO. A facilitator will help the group of approximately 100 CSMFO members develop an action plan for the organization. Your board of directors wants to ensure that the goals and objectives developed at the October 1997 retreat match the expectations of the general membership. We know

for a fact that the new CFO training is a popular program and we are taking steps to continue to provide the program in partnership with USC.



Welcome new CSMFO members

**Annual seminar
registration
packets sent:
register before
January 16**

On the technology track, we continue to provide a forum for discussing the Year 2000 issue. A session is planned for the annual seminar. Most of you will probably agree that we can always gain new knowledge on how to prepare for the Year 2000. I am optimistic that by the time 2000 rolls around, we'll be well-equipped to deal with it. It is overwhelming to think about the things that are run by computers -- from elevators to

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Be heard!

*Mini-News is
always seeking
input from all
CSMFO
members on
topics in any
department
section.*

*It's your
newsletter!*

California Society of Municipal Finance Officers

www.csmfo.org

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IRS Publication 963 (9-95)

Federal/State Reference Guide for Social Security Coverage and FICA Reporting by State and Local Government Employers

Kathy Petronchak, Chief of IRS Field Exam Branch 3, recently contacted CSMFO regarding dissemination of Public Employer Employment Tax compliance information. This is the third and final article in a series provided by the IRS for publication in the Mini-News. For more information or clarification of this information contact Kathy at P. O. Box 30207, Laguna Niguel, CA 92607-0207, or telephone her at (714) 360-2119.

In 1995, this comprehensive guide on employment tax matters was published by the IRS in cooperation with the Social Security Administration and the State of Colorado for use by employers, administrators, and other interested parties.

The guide covers recent legislation, provides general information, and lists contact points for information from the IRS, SSA, and the states. For a copy of Publication 963, call (800) 829-3676.

Contents of the guide include:

1. Introduction
2. Commonly Asked Questions
3. Determining Worker Status
4. Social Security Coverage
5. Medicare/Hospital Insurance
6. Public Retirement Systems
7. State Administrators
8. Social Security Administration
9. Internal Revenue Service
10. Public Employers
11. Forms and Sources

President's Message, continued

security systems to bank deposits to financial systems, must all be made 2000 compliant. For example, I hope that there will be a lot of lessons learned from the recent snafu in the start of deregulation of the California power industry. You probably heard that two days before the official start to open the state's borders to energy competition, state officials announced they were not ready for the switch, delaying the start of deregulation until March 31, 1998. Ratepayers will more than likely pick up the tab for expenses incurred as a result of the delay. Technology will be a major challenge as well as a resource for all of us.

Upcoming Events

CSMFO Annual Seminar

February 22-24, 1998
Hyatt Newporter, Newport Beach

CMTA Annual Seminar

April 20-24, 1998
DoubleTree Inn, Sacramento

*The easy part is
making the
resolution; it's
keeping it that's
tough!*

-Rhonda Tomajic

Proposed By-Laws Changes

Paula Chamberlain, Director of Finance, Pomona
Administration Committee Chair

Here are the proposed amendments to the CSMFO By-Laws. Please review them; they will be voted on at the CSMFO Annual Seminar in February. By-Laws can be found at the back of your current CSMFO directory.

Proposed amendments for February 1998:

ARTICLE II - MEMBERSHIP AND DUES

- delete "associate" in subsection **c**
- move "Transfer of membership" to subsection **g** and delete the word "associate" from "commercial associate"
- add subsection **e** - Retired member
- add subsection **f** - Complimentary membership

and will read as follows:

ARTICLE II - MEMBERSHIP AND DUES

Section A. Qualifications

1. Membership shall be open to any person presently or formerly actively engaged in the field of municipal finance, in one of the following

classifications, providing no direct conflict of interest exists:

a. Active member. (no change to text)

b. Government associate member. (no change to text)

c. Commercial member. This classification shall be open to persons not currently employed by a governmental agency whose livelihood derives principally from activities of commercial or professional nature directly related to municipal finance.

d. Student member. (no change to text)

e. Retired member. This classification is open to former active and government associate members who retire from public service and who do not qualify under Article II, Section A-1(c). The fee for such membership shall be established by the board. Retired members do not carry voting rights.

f. Complimentary membership.

This classification shall be open to those persons as determined by the board and may be limited to temporary, one-year, or lifetime status. Complimentary memberships do not carry voting rights.

g. Transfer of membership.

Memberships for which the dues are paid by the employing institution remain the property of the institution and may be transferred from one person to another provided that the membership qualifications are met. Memberships for which dues are paid by the member remain the property of the member although a change of status from active to government associate or commercial membership shall occur should the member cease to meet the qualifications for active membership.

(Memberships for which the member pays the dues remain the property of the member although a change of membership status shall occur should the member cease to meet the qualifications of the classification.)

ARTICLE IV - MEETINGS - allow government associate member to become chapter chair and will read as follows:

ARTICLE IV - MEETINGS Section C. Chapter Meetings

Chapter organization and meeting schedules shall be determined by the chapter membership, and each chapter shall select a presiding officer. The presiding officer shall be an active or government associate member, and shall act as the liaison representative between the officers of the society and the chapter.

Active Members: Watch for the CSMFO Financial Systems survey mailed under separate cover. We hope you will complete it and fax it back by January 30.

CSMFO Mini-News

1400 K Street, Suite 400
Sacramento, CA 95814
(916) 658-8210
Fax: (916) 658-8240
www.csmfo.org

1998 Annual Seminar packets mailed; be sure to register early

Dennis Danner, Administrative Services Director, Newport Beach
1998 Seminar Host Co-Chair

By now, each of you should have received your registration packet to attend the CSMFO Annual Seminar to be held in Newport Beach on February 22, 23 and 24, 1998 at the beautiful Hyatt Newporter. The Program Co-Chairs, Julia James (Manhattan Beach) and Dave Bass (Lake Forest), have been working hard to ensure an interesting and informative program for you. Included with your registration packet is a Preliminary Agenda. We encourage you to indicate the sessions you plan to attend and return the Preliminary Agenda with your registration. This will help the Seminar Committee in assigning meeting room capacities.

Some of the planned sessions include:

- Internal Investment Management
- Financial Systems Conversion
- Motivating and Evaluating Employees
- Marketing Your Budget
- Effective Financial Presentation

We will also have an encore of last year's successful Tuesday format put on by CSMFO's Career Development Committee.

We encourage you to register early to take advantage of the early registration discount and to make your flight reservations into Orange County's

John Wayne Airport since low fare flights may be limited. The Orange County Airport is minutes from the Hyatt Newporter. The hotel runs an hourly shuttle between hotel and the airport, and convenient taxi service is available at a one-way fare of \$12.

Finally, this year's banquet theme is "Tropical Nights" and tropical attire or destination resort wear is suggested. We will have an informative and fun seminar. Hope to see you there!

Chapter Corner: South Bay Chapter

Bret Plumlee, Finance Director, Rolling Hills Estates
Chair, South Bay Chapter

The CSMFO South Bay Chapter consists of 21 coastal cities ranging in population from 2,000 in the city of Rolling Hills to 425,000 in the city of Long Beach.

Collaboration was the key theme for the South Bay Chapter in 1997. Joint chapter meetings were held with the Central LA Chapter every other month, which increased participation and attendance.

One of the goals of the South Bay Chapter this year was to form better lines of communication among the various governmental agencies. Topics which aimed at achieving this goal included intergovernmental relations between cities and the County of Los Angeles, the Los Angeles County property tax payments and appeals process, city Internet homepages and using the Internet as a tool, and sales tax information. Speakers, which included representatives from the LA County Assessor's, Auditor Controller's, and Chief Administrative Offices, as well as the State Board of Equalization, explained their various procedures and areas of responsibilities and distributed contact lists for all key departments.

City representatives gave presentations on city homepages and explained how to access and use pertinent information through collaboration on the Internet.

The chapter meetings proved once again to be an excellent forum for sharing and networking information

among the cities, a key priority in the city of Rolling Hills Estates.

Rolling Hills Estates is a rural residential community characterized by rolling hills, vast open spaces, and white three-rail fences. Incorporated on September 18, 1957, and having a population of just over 8,200, the commercial downtown district consists of six main centers, including the Shops at Palos Verdes, the Peninsula Center, the Brickwalk, Town and Country, the Village, and Silver Spur. Rolling Hills Estates is located on the Palos Verdes Peninsula, and many of its 68,000 residents shop in Rolling Hills Estates.

The city has been involved in a community-wide effort to create an economic development strategic plan for almost two years. The City Council formed an Economic Development Commission in April 1996 consisting of five representatives from City Council and staff; five representatives from the Chamber of Commerce; and five representatives from the business community in anticipation of losing two of its major sales tax producers in 1996. The Commission agreed to select a consultant to prepare an economic development strategic plan, focusing on the retention of existing and attraction of new businesses in Rolling Hills Estates while making recommendations for creating a sense of destination.

Various members from the Commission and the entire Palos Verdes Peninsula community helped fund the cost of the consultant. Public collabora-

tion on the project helped provide the feedback to the consultant which was key to completing the plan. Input from the public included interviews with community stakeholders, cable television shows in the city's economic development activities, telephone shopper surveys, presentations to City Council, and community open houses and town hall meetings.

The plan was adopted as final in September 1997. The city has now formed four committees and an area-wide merchants association to implement the recommendations made by the consultant.

The Rolling Hills Estates Area-Wide Merchants Association has met several times and has now drafted a mission statement, selected a president and board of directors, and set dates for the next six months of meetings. Additionally, they have discussed the idea of voluntary dues by the merchants to fund a marketing plan for the entire Rolling Hills Estates commercial district. The formation of this association was one of the key recommendations made in the strategic plan.

Continuing collaboration among the city, its residents and merchants, and the entire Palos Verdes Peninsula community will be key to the success of the city's economic future.

Movin' On

After being with Wells Fargo for 50 years and CSMFO for 30, **Jackson Eaves** has retired as of December 31, 1997. "I am very proud of the fact that in 30 years I have never missed any of the conferences of CSMFO, CMTA, or CACT & TC. And I only missed one GFOA conference, but that was because it fell on the exact day of one of the Treasurers' conferences," said Eaves. We wish you well, Jackson! You're an institution!

Barbara J. Steckel, Finance Director/ Treasurer for the City of Riverside, has announced her retirement, effective March 10, 1998.

Barbara has enjoyed an accomplished and successful career as Finance Director and has brought about many fundamental changes during her time with the city. Included in Barbara's professional accomplishments are the Certificate of Achievement for Excellence in Financial Reporting from the Government Finance Officer's Association (GFOA) and

the Certificate of Award for Outstanding Financial Reporting from CSMFO for the city's Comprehensive Annual Financial Report (CAFR) for each of her ten years as Finance Director; the Dr. Jackson R.E. Philips Award for Outstanding Leadership and Contribution to the Management of Public Funds from the Municipal Treasurers Association (MTA US & C); and the Certificate of Excellence Award from the MTA for an outstanding written investment policy.

Barbara was president of CSMFO in 1996 and has made many significant contributions to the organization over the last 10 years.

Barbara will be enjoying her many pursuits in retirement with her husband Dale, enjoying summers in their beautiful home in Alaska and spending winters in Palm Desert.

We wish Barbara happiness in her retirement adventure.

GFOA's 1998 Certified Public Finance Officer program

On Friday, June 26, 1998, in conjunction with the GFOA Annual Conference, GFOA will begin the second year of the Certified Public Finance Officer program in San Francisco by introducing the second examination, Cash Management and Investments. The certification examinations are designed to test the body of knowledge required of a practicing public finance officer. Candidates who successfully complete all five examinations in the program will be awarded the designation Certified Public Finance Officer. GFOA will also be offering the Governmental Accounting, Auditing and Financial Reporting examination on the same date. For more information and an application packet, please contact the GFOA office at (312) 977-9700, or e-mail certification@gfoa.org. Information will also be available on the GFOA web page: www.gfoa.org.

Happy New Year from CSMFO!

Ray Pearsall, former Finance Director of the city of Pasadena, died on September 24, 1997 at age 81 from a heart attack. He is survived by his wife, Mattie. He will be missed.

Meetings

San Diego Chapter

Date: January 15, 1998
Time: 11:30 AM
Place: Marriott La Jolla
Spkr: George Chamberlain
Topic: Economic Forecast 1998
Rsvp: Tess Limfueco
 (619) 336-4267

Meeting after next: March 19, 1998

Desert Mountain Chapter

Date: January 22, 1998
Time: 10:30 AM
Place: City of Palmdale
 Cultural Center
Spkr: Nick O'Hare, Don Harrison
Topic: Passage of SB 110 and the
 Opportunities for your
 Agency
Rsvp: Bill Ramsay (805) 267-5411

Coachella Valley Chapter

Date: January 16, 1998
Place: Westin Mission Hills Resort
 71333 Dinah Shore Drive
 Rancho Mirage
Spkr: Michael Williams, Treasurer
 City of Colton
Topic: Competitive v. non-competi-
 tive bidding of bond issues
Rsvp: Dee Hasman
 Rancho Mirage
 (760) 324-4511

*Meeting after next:
 March 1998, Cathedral City*

**Please fax
 your meeting
 announcements
 to
 Shelley King-McGee
 at
 (916) 658-8240**

GASB 31 workshop to be held in March

The Institute for International Research will host a GASB 31 conference on Friday, March 27, at the Monte Carlo Resort in Las Vegas. This comprehensive workshop for government internal and external investment pools will cover a variety of topics aimed at providing solutions on how to implement 31.

Some of the sessions planned for this ground-breaking event are as follows:

- The Politics of GASB 31. This session will cover the background of 31 and provide real-world examples of 31's impact on operations, including how it distorts financial reporting and confounds the entire budgeting process.
- Identifying and Budgeting for the Crucial Operational and Implementation Issues. Find out what is required in financial reporting; applications and implementation tips; how to satisfy auditors; and budgetary implications.

- Evaluating External Investment Pools: A County's Perspective. Practical insights on bid versus asking price; assigning value from a yield curve; allocation options; valuation frequency; and market value reporting on the three-month to one-year positions.
- Investment Income and Asset Reporting Under GASB 31. Procedures for reporting income on discount and zero coupon bonds; total return reporting; and understanding the designation of investment classes.

Complete registration for this one-day event is \$995. Employees of government entities will receive a \$545 discount, subject to IIR approval. For more information or to register:

PHONE 888/670-8200.
 EMAIL us002506@mindspring.com
 INTERNET www.iir-ny.com

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message. No information is needed on the subject line of the e-mail. A password and directions on how to complete your subscription to this list will be e-mailed back to you. Follow the directions provided and you are ready to go. You should be able to complete the entire process in a few minutes.

If you have questions, contact Alex Donovan, CSMFO Secretary, at (916) 658-8210, or by e-mail at DonovanA@cacities.org.

Up the Ladder

FINANCE DIRECTOR - City of Visalia, CA. Salary range: \$71,187 to \$78,673. The city of Visalia, population 94,200, known for its small town charm, good schools and safe neighborhoods, is recruiting a new Finance Director. The ideal candidate will have a strong technical background and proven leadership and management skills. Visalia, a full-service city, has a total budget of \$76.3 million and 453 employees. The Finance Department has an operating budget of \$2.1 million and 28 employees. If you are interested in this outstanding opportunity, please submit your resume along with current salary and the names and phone numbers of five work-related references to Bobbi Peckham or Bob Murray, David M. Griffith & Associates, Ltd., 4320 Auburn Boulevard, suite 2000, Sacramento, CA 95841. Brochures available, call (916) 485-8102 or e-mail recruit@dmgriffith.com.

FISCAL SERVICES MANAGER - Los Gatos-Saratoga Community Education and Recreation, Los Gatos, CA. Salary range: \$54,000 - \$65,640 + excellent fringe benefits. New position. If you are a skilled fiscal services manager we invite you to apply. This FLSA exempt employee performs technical administrative and line functions. Duties include budget preparation, personnel management, PERS reports, risk management, inventory control, management information systems and accounting functions. The position requires being able to perform detailed accounting duties, preferably to the CPA level. Will be responsible for the day to day accounting functions of the department. This is a hands-on manager. Filing deadline: Friday, January 30, 1998. Apply to: Los Gatos-Saratoga Community Education & Recreation, 123 E. Main St., Los Gatos, 95030, Attention: Bob Best. Phone (408) 354-8700, ext. 226.

DEPUTY CITY MANAGER - City of San Jose. The city of San Jose, California's 3rd largest city, seeks an experienced, energetic public sector manager to join the elite team of Deputy City Managers. This position reports to the City Manager and provides guidance, oversight and strategic planning assistance to several city departments. Deputy City Managers work closely with the Assistant City Manager who serves as the city's chief administrative officer. Together with the Assistant City Manager, Deputy City Managers comprise the Manager's leadership team. Together, Deputy City Managers and the Assistant City Manager form the City Manager's leadership team. Deputy City Managers staff council committees, lead special task forces on strategic and long range issues and act as troubleshooters in resolving complex city issues.

The ideal candidate is an experienced local government manager or assistant manager with integrity and a proven record of success. The successful candidate will be professionally mature, flexible and people oriented. In addition to exceptional management and communication skills, the position requires proficiency in facilitation, negotiation of complex issues and use of collaborative problem-solving processes.

The position requires a minimum of five years at the management and policy making level and working with professional staff. This position does not have line authority over operational departments, but does exercise considerable influence. The salary depends upon qualifications and experience of the individual and appointment is expected to be not higher than the midpoint of the salary range. The city uses broad banded salary ranges as part of its pay for performance program. This position's range is \$95,124 - \$151,152. Movement within the range is based entirely upon perfor-

mance. The city provides an excellent array of benefits, including participation in the COSJ retirement program (reciprocal with PERS) and a 2.5% at 55 program.

Brochure available. Submit resume and cover letter with current salary and three work related references by Friday, January 30, 1998 to: SHANNON ASSOCIATES, 1601 Response Road, Suite 390, Sacramento, CA 95815 (916) 567-4280; FAX: (916) 567-1220.

FINANCE DIRECTOR - City of San Carlos. Salary: \$5,970 to \$7,257/month. The Finance Director serves as the chief financial officer of the city and the San Carlos Redevelopment Agency, responsible for developing and implementing its financial policies and plans, and for providing management with financial reports and controls required for the effective conduct of the municipal corporation and for the safeguarding of funds and assets of the city. Send resume to Leslie Loomis, Personnel Director, City of San Carlos, 600 Elm St., San Carlos, CA 94070-3085, or via e-mail at leslie.loomis@ci.san-carlos.ca.us by Friday, January 30, 1998 at 5:00 PM. Please note: Resumes will not be accepted after January 30, 1998.

REVENUE OFFICER - City of Gilroy, \$42,758 - \$55,585 per yr. Directs the Revenue Division in the receipt & collection of City funds & revenue analysis. Any combination equivalent to College grad in accounting, or closely related field & 3 yrs professional exp in accounting, auditing &/or treasury, preferably Municipal Finance & 2 yrs in a supv. capacity. Requires customer service skills. Exc benefits. Submit a City of Gilroy application by 5 PM on Feb. 20, 1998. Call job hotline (408) 848-7606 for application. EOE/AA/ADA. City of Gilroy Human Resources Division.

Up The Ladder continued on next page

Classified job ads cost \$8 per line as they appear on pages 9 and 10 of the Mini-News. Deadline is the 25th of each month for next month's newsletter. Fax your classified job ad to (916) 658-8240, attention: CSMFO Classified Ads.

Up the Ladder, continued

INFORMATION SERVICES MANAGER

- City of Yuba City. \$3,994 - \$4,855 (plus excellent benefits). This is a key division head position and the individual selected will oversee the day-to-day operations of the Information Services Division including supervising, administering, troubleshooting and maintaining a Novell 3.12 system and two Unix systems. Requires graduation from a four-year college or university with coursework in programming, computer science, business, information systems, accounting. An MBA or MPA degree is highly desirable. Apply City of Yuba City, Human Resources Department, 1201 Civic Center Blvd., Yuba City, CA 95993 (530) 822-4610. TDD (530) 822-4732. Applications, supplemental questionnaires, resumes and supporting educational documentation must be submitted by 2/6/98. EOE.

GRANT FINANCIAL ADMINISTRATOR

- South Tahoe Public Utility District - (Salary: \$2,787 - 3,921/mo DOQ, full benefits). Responsible for managing grant-related activities including submission of grant applications, compliance monitoring, grant acctg, audit prep and oversight of funding appeals. 3 yrs experience in acctg & budget, 5 yrs in business or project mgmt. Position is temporary - expected minimum duration - 2 yrs. Full benefits. \$2,787 - 3,921/mo DOQ. Application Deadline: 12:00 noon 1/20/98. Application and Job Description available at S.T.P.U.D., 1275 Meadow Crest Dr., SLT, CA 96150, (530) 544-6474 x 222. Completed application must be received by deadline noted above.

TREASURY OFFICER - Santa Clara Valley Water District, San Jose, CA. - Salary \$5,205-\$6,342 monthly plus a generous benefit package and 2% at 55 retirement with PERS. This position will work in the Business Resources Group and manage the district's investment portfolio, administer the district's debt issues, perform complex analytical work in determining maximum revenue resources for district funds, and perform related duties. Qualifications: training and experience equivalent to graduation from college with major course work in accounting, economics, finance, or a related field PLUS five years of accounting/financial activities with increased responsibility in treasury management. Experience in governmental agency highly desirable. Apply SCVWD Personnel Office, (408) 265-2607 ext. 2260 for application package. Final filing date January 29, 1998 ~~at~~ 4:30 PM. Postmarks are not accepted. EOE/AA.

INVESTMENT OFFICER/SENIOR ADMINISTRATIVE ANALYST

- City of Mountain View. (Salary \$51,635 to \$64,544 annually) Responsibilities include: managing and monitoring the City's investments by tracking cash flows, analyzing investment opportunities and making recommendations to the Finance and Admin. Services Director. Position requires 3 yrs. senior level experience related to investments and Treasury functions, also exp. managing a fixed income investment portfolio, increasingly responsible administrative/analytical experience. Bachelor's degree in related field. Applications will be accepted until position is filled. Please apply promptly. Call (650) 903-6310 to request application and brochure.

Attention advertisers: The cost to advertise a two-inch professional square ad is \$825 per 12 issues. If you would like to advertise your firm in this section, please contact Shelley King-McGee and request an advertisement brochure. Remember, more than 750 finance directors, assistant finance directors, accountants, controllers and treasurers statewide read the Mini-News every month.

Members' Professional Services, continued