

November, 2007

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**CALIFORNIA SOCIETY OF
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Name Change, 2008 CSMFO Board Objectives, Administrative Services Support Change

Ballot Results for Proposed Name Change

On October 8, 2007 ballots were counted for the proposed name change from CSMFO to Cal-GFOA. Out of approximately 1,100 ballots sent out, 609, or just over 55%, were returned. 242 votes were in favor of changing the name to California Government Finance Officers Association. 367 votes were against changing the current name. In order to change the name 2/3rds of the votes cast needed to be in favor of the change.

were reviewed to determine experience in providing association administration, amount of resources that would be dedicated in providing services and cost.

At the October 3, 2007 Board meeting the Administration Committee recommended, and the Board approved, entering into a contract with DMH Management Services.

Thanks to the Administration Committee, comprised of Rob Burns, Joan Michaels

“242 votes were in favor of changing the name to California
Government Finance Officers Association. 367 votes were against.”

In this case the “No” votes won and our organization will continue to be called the California Society of Municipal Finance Officers.

Many thanks to the League staff and Janet Salvetti and Cathy Lucas of the City of Stockton for counting the ballots.

Administrative Services Support

Because of CSMFO's growth the Board recognized a need for additional professional administrative services. In order to review all options the Board approved issuing a Request for Proposal to potential service providers. In August 2007 the Administration Committee sent out a Request for Proposal to four vendors. Three responses were received and they

Aguilar, Cathy Lucas, Stephen Dunn, Stephen Conway, Bob Biery, David Cain and Karen Brust, for all their hard work.

Please read the article in this issue from the Administration Committee that provides additional details about DMH Management Services.

CSMFO Board Objectives For 2008

On October 2, 2007 the annual CSMFO Board retreat was held at the Disneyland Hotel, which is the conference site for the 2008 annual conference.

The purpose of the annual retreat is for officers, directors and standing committees of CSMFO to plan the organizations objectives for the upcoming calendar year.

Continues on next page

OFFICERS, DIRECTORS AND STANDING COMMITTEES

President

Brad Grant, Merced

President-Elect

Karen Brust, San Diego County Water Authority

Past President

Mark Alvarado, Monrovia

Secretary/Treasurer

Debbie Michel, League of CA Cities

Board of Directors

Lisa Hildabrand, Carlsbad
Thomas Fil, Belmont
Viki Copeland, Hermosa Beach
Pauline Marx, San Francisco
David Cain, Chino
Scott Johnson, San Jose

COMMITTEES

Administration

Robert Burns, Chino
Joan Michaels Aguilar, Azusa
David Cain, Chino
Cathy Lucas, Stockton
Bob Biery, Westlake Village
Karen Brust, San Diego County Water Authority
Stephen Dunn, Upland
Steve Conway, Los Gatos

Annual Seminar

Jesus Nava, Burlingame
Russ Fehr, Sacramento
Dennis Danner, Newport Beach
Mark Alvarado, Monrovia
Janet Salvetti, Stockton

Budgeting & Management Reporting

Cindy Guziak, Orange County Fire Authority
Chu Thai, Beverly Hills
Pamela Arends-King, Santa Ana
Laura Nomura, Hemet
Agnes Walker, South Bay Regional Public
Communications Authority
Gina Schuchard, Santa Clarita
Scott Johnson, San Jose

Career Development

Ronnie Campbell, Lakewood
Carolyn Dominguez, San Luis Obispo
Christy Pinuelas, Camarillo
Mary Bradley, Sunnyvale
Margaret Moggia, West Basin Municipal
Water District
Viki Copeland, Hermosa Beach
Jerry Rodgers, Riverside

Fiscal Policy

Tracey Hause, Arcadia
Josh Betta, South Pasadena
Irwin Bornstein, Mission Viejo
Julia James, South Gate
Scott Johnson, San Jose

Membership Benefits

Paula Chamberlain, Pomona
Steve Chapman, Moreno Valley
Joy Canfield, Escondido
Bob Torrez, Burbank
Lisa Hildabrand, Carlsbad

Professional & Technical Standards

Jesse Takahashi, Campbell
Sandra Schmidt, Las Virgenes MWD
Crystal Alexander, Culver City
Bill Statler, San Luis Obispo
Pauline Marx, San Francisco

Technology

John Adams, Thousand Oaks
Barbara Boswell, Lancaster
Mark Moses, Stockton
Julia James, South Gate
Bret Plumlee, La Quinta
Thomas Fil, Belmont

President's Message, *Continued from cover*

The one-day retreat was very successful thanks to Karen Brust organizing the event and Don Maruska providing the facilitation.

The "Action Objectives" that will be the focus of the Board for 2008 are as follows:

1. Expand awareness of local government finance profession and CSMFO's value.

2. Engage commercial members effectively.
3. Enhance training.
4. Improve information exchange.
5. Broaden leadership on state actions and issues.
6. Enhance execution and accountability.
7. Attract talent into the profession.

— **Brad Grant**

*City of Merced, Finance Officer
2007 CSMFO President*



Pictured above are the participants who attended the CSMFO Board retreat.

Pictured: Front row-l to r; Teri Anticevich, Thomas Fil, Viki Copeland, Laura Nomura, Paula Chamberlain, Janet Salvetti, Margaret Moggia & Mark Moses. Second row-l to r; Bob Biery, Ronnie Campbell, Gina Schuchard, Cindy Guziak, Carolyn Dominguez, Christy Pinuelas, Joan Michaels-Aguilar & Steve Chapman. Third row – l to r; Don Maruska, Rob Burns, Cathy Lucas, John Adams, David Cain, Dennis Danner & Brad Grant.

Not pictured: Mark Alvarado, Scott Johnson, Chu Thai, Agnes Walker, Pauline Marx, Debbie Michel, Sandra Schmidt & Pamela Arends- King.

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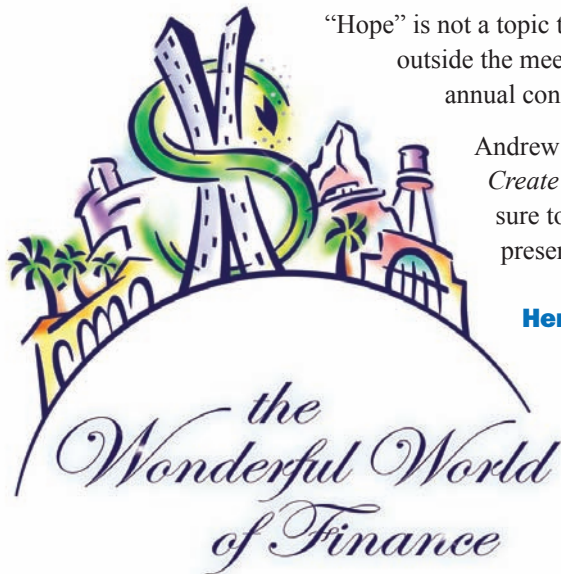
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2008 CSMFO Annual Conference

Tuesday, March 4 – Friday, March 7, 2008

Disneyland Hotel, Anaheim California



“Hope” is not a topic that you commonly see in conference programs or hear discussed in the hallways outside the meeting rooms. However, you have an exciting opportunity waiting for you at the annual conference in Anaheim.

Andrew Razeghi will present ideas from his book, *Hope, How Triumphant Leaders Create the Future*, at the closing session of the conference on Friday, March 7th. Be sure to make your travel plans accordingly to ensure that you can stay for this inspiring presentation.

Here are what a few people have to say about Andrew and his book:

“If you want to know what it takes to believe – to hope- when no one else does, read this book.”

— LANCE ARMSTRONG, cancer survivor and Tour de France champion

“Andrew Razeghi convinces us all that hope is a mighty power and when wisely used can bring great results. Don’t miss this splendid book!”

— KEN BLANCHARD, Co-author *The One-Minute Manager®* and *The Secret*

“Wow! What a great book! This is the trail blazing management book of our time: an original approach supported by inspirational stories, well supported arguments and tons of practical use-it-now techniques. This must-read book will be required at all of my next round of off-site client workshops and it heads my book gift list for clients and colleagues. The ‘Exercising Your Hope Muscles’ section was particularly rich in easy-to-apply practical techniques.”

— JAMES BELASCO, Ph.D., coauthor of the best selling books: *Teaching The Elephant to Dance*, *Flight of the Buffalo* and *Soaring With The Phoenix*; Executive Director, Knowledge Dialogue

“This book has guts. In Hope, Andrew Razeghi courageously dives head first into an unexplored virtue that quietly makes successful people tick.”

— PAUL ORFALEA, Kinko’s founder and author of *Copy This!*

“Andrew Razeghi has done a fantastic job of using a wide variety of real life success stories to illustrate the power of hope. Hope offers an inspiring read to all.”

— JACK CAKEBREAD, chief executive, Cakebread Cellars

In addition, while you are planning for the conference, you may want to think about attending one of the pre-conference sessions we are offering: “Getting Things Off Your Mind and Getting Them Done – the Zen of In-Basket Maintenance” by The David Allen Company and “Reading People From the Outside In” by Dr. Harry Perdw. More about these next month!

— **Viki Copeland, Co-Chair**
2008 Host Committee

2008 CSMFO Annual Conference

Tuesday, March 4 – Friday, March 7, 2008
Disneyland Hotel, Anaheim, California



“The Wonderful World of Finance”



Your 2008 CSMFO Annual Host Conference Committee is busily at work preparing for “The Wonderful World of Finance.” We are honored to introduce you to this amazing group of volunteers:

2008 HOST COMMITTEE

Karen P. Brust, Co-Chair

Director of Finance/Treasurer, San Diego County Water Authority

Teri Anticevich

L & A Meeting and Management Services, Inc.

Pamela Arends-King

Assist. Director of Finance & Management Services, City of Santa Ana

Ronnie Campbell

Assistant Director Administrative Services, City of Lakewood

Viki Copeland

Finance Director, City of Hermosa Beach

Gavin Curran

Finance Officer, City of Laguna Beach

Dennis Danner

Administrative Services Director, City of Newport Beach

Ed Zacherl, Co-Chair

Assistant Finance Director, City of Anaheim

Marc Puckett

Director of Finance/City Treasurer, City of Costa Mesa

Carol Jacobs

Administrative Services Director, City of Stanton

Bob Torrez

Financial Services Director, City of Burbank

Adina Vazquez

Senior Project Manager, District Admin. Services, MuniFinancial

Danielle Wood

Senior Consultant, NBS

Mark your calendars now to attend the **2008 CSMFO Annual Conference**. Visit the CSMFO website at www.csmfo.org for hotel information. Disneyland Hotel reservations are open. Be sure to book your room now to ensure your stay at the happiest place on earth. Watch for additional information in months to come. We look forward to seeing you in Anaheim.

CSMFO Chapter Chairs

Chapter	Chairperson	Telephone	Email Address
Central Los Angeles	Eddie Malonzo	562.916.1369	eddie_malonzo@ci.cerritos.ca.us
Central Coast	Jennifer Sorrenson	805-237-3999	jsorensen@prcity.com
Central Valley	Melinda Wall	209/827-7099	melinda.wall@losbanos.org
Channel Counties	Michelle Romney	805-654-2125	michelle.romney@ventura.org
Channel Counties	Lettie De Dios	805/385-7475	lettie.dedios@ci.oxnard.ca.us
Coachella Valley	Nancy Klukan	760/323-8361	Nancy.Klukan@palmsprings-ca.gov
Desert Mountain	Cindy Prothro	661/723-6038	cprothro@cityoflancaster.org
East Bay	Herbert Pike	510-620-6729	Herbert_pike@ci.richmond.ca.us
Imperial County	Veronica Alvarado	760/768/2135	valvarado@calexico.ca.gov
Inland Empire	Pat Moeder	951/736-2327	pat.moeder@ci.corona.ca.us
Monterey Bay	Marc Pimentel	831/646-3947	pimentel@ci.watsonville.ca.us
North Coast	Bill Mushallo	707/543-3092	bmushallo@ci.santa-rosa.ca.us
Northeast Counties	Steve Strong	530/225-4087	sstrong@ci.redding.ca.us
Northwest Counties	Vacant		
Orange County	Esmyrna Jorge	949/707-2626	mjorge@ci.laguna-hills.ca.us
Peninsula	Stuart Schillinger	415/508-2151	schillinger@ci.brisbane.ca.us
Sacramento Valley	Vacant		
San Diego County	Dennis Coleman	858-720-2461	dcoleman@cosb.org
San Gabriel Valley	Mark Alvarado	626/932-5510	malvarado@ci.monrovia.ca.us
South Bay	Mike Whitehead	310-377-1577	Mike@ci.Rolling-Hills-Estates.ca.us
South San Joaquin	Judy Bier	559/891-2260	judyb@cityofselma.com

Welcome CSMFO's New Administrative Services Team! DMH Management Services

CSMFO continues to reach new heights in its efforts to provide meaningful professional growth resources and opportunities for its members. As part of this effort, CSMFO evaluated its increasing complex need for professional administrative services and has hired DMH Management Services. DMH has been in business for more than 15 years and has over 10 years of association management and event planning experience. DMH will be utilizing this experience in providing CSMFO administrative support, financial management support, as well as, meeting and conference support.

Devon Hood will be the primary contact for CSMFO with services also provided by Allie Fuller and Dayna Lee. The DMH team is dedicated to helping CSMFO grow and expand its member services. Devon's commitment is revealed in her statement: "Our clients can count on us for professional leadership skills, experience and outstanding customer service for their association and its members".



Devon Hood

Devon's current and past clients include the Oregon Municipal Finance Officers Association, the Oregon Business Travel Association, and the National Association of Insurance and Financial Advisors. CSMFO looks forward to this new business relationship as we strive for the next level.

The DMH team is dedicated to helping
CSMFO grow and expand its member services.

CSMFO greatly appreciates the tremendous efforts of the League of California Cities and their staff over the last 27 years. The League's administrative support over the years has helped CSMFO reach its current professional status as a premier member association. CSMFO looks forward to a continued mutually beneficial relationship with the League in the years ahead.

DMH will begin servicing CSMFO members on December 1, 2007. Please continue to send your membership renewal payments to the League Office through November 30th.

DMH Management Services Contact Information

Toll Free Phone Number: 1-877-282-9183

Email Address: dmhmngmt@comcast.net

Mailing Address:

DMH Management Services

PO Box 13308

Portland, OR 97213

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Featured Speaker – J. D. McNaul, Manager, eCorrespondence Solutions, InfoSend, Inc.

J.D. has been in sales, business development and marketing for over 20 years. He received his BS in Management & Marketing from San Jose State University in 1984 and his MBA from the University of Phoenix in 1997. J.D. has held senior sales and development positions in the industry for Novazen, Inc.; Sun Microsystems where he headed up three EBPP software product lines worldwide; and BCE Emergis and ACI Worldwide where he was responsible for sales and business development for their EBPP products across the America's. He joined InfoSend in February of 2007 to head up the sales and business development of InfoSend's industry leading hosted EBPP platform and eCorrespondence solutions.

**Tuesday, November 13, 2007
11:30 am to 1:30 pm**

Bluewater Grill Seafood Restaurant & Oyster Bar

**665 North Harbor Drive
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For Directions refer to www.bluewatergrill.com

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Mike Whitehead
Administrative Services Director
City of Rolling Hills Estates
Mike@ci.Rolling-Hills-Estates.ca.us
310-377-1577 xt 112

Central LA Chapter Chair
Eddie Malonzo
Accountant
City of Cerritos
Eddie_Malonzo@ci.Cerritos.ca.us
562-860-0311 xt 2037



No Shows who RSVP will be Invoiced



"Save the Date"

Joint Holiday Luncheon Meeting Northern Chapters Of CMTA & CSMFO

Friday, December 14, 2007

11:30 a.m. – 2:00 p.m.

Crowne Plaza Union Square
480 Sutter Street, San Francisco

REGISTRATION — 11:00 A.M.

PROGRAM — 11:30 A.M.

HOLIDAY LUNCH

Choice of Grilled Salmon

Sirloin of Beef

Vegetable Lasagne

Details and registration information will be mailed in early November.



Congratulations!

Carolyn Dominguez, Finance Manager for the city of San Luis Obispo, will retire on December 5, 2007. CSMFO would like to congratulate Carolyn on her many years of public service and thank her for all she has contributed to CSMFO!

A bit about Carolyn:

She began employment with the City of San Luis Obispo after 15 years with two Bakersfield CPA firms. Carolyn has been active with CSMFO since 1995, most recently serving on the Board of Directors. Carolyn is also Past-President of the Institute of Management Accounts.

Carolyn has been involved in public service off and on since she was twelve years old and volunteered at the library to read stories to children. At age 18 she enlisted in the Navy and met her husband, John, while stationed in San Francisco. She later worked as a relief dispatcher for the Atwater Police Department.

Carolyn and John have been married for forty years and have two fabulous sons and two wonderful grandchildren. They are looking forward to traveling and visiting family and friends.

League of California Cities Financial Management Seminar

December 5th – 7th, 2007 in lovely Monterey!

Registration and Housing Deadline closes November 13, 2007

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**Members of MMANC and MMASC receive a discount of \$50 off the registration price.*

Up the Ladder

See our website: www.csmfo.org
for more listings

DIRECTOR OF FINANCE, Association of Bay Area Governments, Oakland, CA. Salary: DOQ plus excellent benefits including PERS 2.5% @ 55 (employer paid). The Association of Bay Area Governments (ABAG) is recruiting for a Director of Finance who also serves as CFO of a number of affiliated entities providing member service programs. ABAG is the Council of Governments and regional planning agency for the nine counties and 101 cities of the San Francisco Bay Area. Position provides full range of finance, accounting and budgeting services including management of investments and reserves. Requires Bachelor's in Accounting or related field; Master's preferred; relevant professional certification; and minimum five years progressively responsible management experience. Send cover letter, resume, and application with compensation history or requirements to Association of Bay Area Governments, Attn: Patricia Jones, Assistant Executive Director, P.O. Box 2050, Oakland, CA 94604. Website: <http://www.abag.ca.gov/jobs.html>. Deadline: January 7, 2008. EOE

DIRECTOR OF FINANCE, City of Glendale, CA. Salary: \$140,448 to \$173,328 DOQ. Glendale (population 207,000) is the third largest city

in L.A. County. It is one of the most livable cities in Southern CA and is a full-service City with a water and electric department. The total City budget is \$600 million with a ten-year CIP of \$500 million and 1,986 staff. The Finance Department has 44 employees and is responsible for accounts payable, budget, accounting, grants, payroll, purchasing, and the financial elements of risk management, as well as graphics and enterprise services. Position reports to the City Manager. Desire the equivalent of a relevant bachelor's degree and at least 8 years of responsible municipal finance experience, including 5



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years in a senior level supervisory position. A master's degree, CPA, CPFA and/or CPFO are highly desirable. Should have experience in long range financial planning, debt issuance, and evaluating and implementing financial and operating systems. Contact: Norm Roberts, Roberts Consulting Group Inc. (760) 200-4343. Full Brochure: www.robertsrcg.com/12101p/glendalefin.pdf. Must be received by 11/16/07. Send Resume to: robertsrcg@msn.com or fax to (760) 200-4395. EEO/ADA.

SENIOR MANAGEMENT ANALYST (Public Safety), City of Irvine. Salary: \$68,075 - \$102,111 annually.

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assurance, provide regular advice and consultation to senior management, researches, interpret, analyze and implement new programs, while managing comprehensive human resource programs, including employee recruitment, training, labor relations, classification/compensation, benefits administration, and legal compliance activities. Position requires a Master's degree in Public Administration, plus six years of municipal management experience or any combination of education and experience that provides equivalent knowledge, skills, and abilities. Position closes on 11/8/07. Please visit www.cityofirvine.org/jobs for a detailed position description and to apply. EOE

FINANCE DIRECTOR. City of Murrieta. Salary: DOE. The City of Murrieta, is seeking a progressive leader to fill the critical position of Finance Director to assume full management responsibility of the Department. The incumbent will implement policies and establish procedures related to finance, purchasing, accounts payable, revenue collection and internal audit functions; and develop and administer the department and city-wide budget. The ideal candidate will have a Bachelor's degree and six years of progressively responsible supervisory and administrative experience involving municipal account-

ing. A Certified Public Accountant is preferred. Interested candidates should apply immediately. Submit resume, cover letter and five references to apply@ralphandersen.com. Confidential inquiries welcomed to Ralph Andersen & Associates at (916) 630-4900. Open until filled Contact: Heather Renschler, 916.630.4900, fax 916.630.4911. E-mail: apply@ralphandersen.com Website: www.ralphandersen.com

DIRECTOR OF FINANCE, City of Pico Rivera. Salary : \$8,038 – \$11,392 per month. Zone C salary range considered after 5 years of service. The Director of Finance will oversee a department consisting of 16 Full-Time Employees and five

<p>Andrew M. Ach andy@nhainc.net</p>	<p> NORTHCROSS HILL ACH <i>Financial Advisors to Public Agencies</i></p>
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<p>Christine Donohue chris@nhainc.net</p>	

divisions. Qualifications include a Bachelor's Degree from an accredited college or university with major coursework in accounting, public or business administration. A Master's degree or CPA designation is desirable but not required. Eight years of increasingly responsible experience in California municipal government, accounting and financial work including six years of supervisory experience, seven years of public contact work and three years of budget/policy experience is required. Thorough knowledge of municipal accounting and finance administration principles, systems, procedures, reports and

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practices; management and organization theories, principles, practices and methods; laws and regulations which govern municipal and Redevelopment Agency finance administration; treasury management and investment programs available for municipal funds; municipal budgeting processes. Contact: Maria Uranga, muranga@pico-rivera.org. (562) 942-2000, fax: (562) 942-8793 Website: www.pico-rivera.org Deadline: November 29, 2007

ASSISTANT FINANCE DIRECTOR, Santa Monica, CA. Compensation: Up to \$138,885 (Plus eligibility for an annual performance bonus up to 10%). Santa Monica is home to approximately 91,000 residents and offers beautiful neighborhoods, world-class beaches with the famous Santa Monica Pier, fabulous restaurants, art galleries and museums, the Third Street Promenade, and



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