



Keys to Successfully Leading a Finance Department

Scott Catlett

Drew Corbett

Debbi Lauchner



Career Progression Highlights

Scott Catlett
Assistant Finance Director
City of Riverside

Education

- Bachelor of Science in Management, Finance, Tulane University (New Orleans, LA)
- Completed 60% of coursework for a Master of Urban and Regional Planning degree, University of New Orleans
- Master of Public Administration, California State University, San Bernardino
- Additional accounting courses at UCLA extension to complete the educational requirements to take the CPA exam and improve my knowledge of more advanced accounting topics



Previous Experience

- Associate, TMG Consulting
 - Smaller regional consulting firm with 20 employees
 - Provided capital facilities planning and other financial consulting services to municipalities and airports in the southeastern United States
 - Traveled 30%
- Project Manager, GCR Inc.
 - Larger consulting firm with 100 employees
 - Provided capital planning-related software implementation and consulting services to state & local governments and airports throughout the United States
 - Traveled 70%



Previous Experience

- City of Riverside
 - 12th largest city in California with 315,000 residents
 - 2,700 employees with a \$1.0 billion annual budget
 - Full service city including electric, water, and sewer utilities
- Principal Management Analyst
 - Primarily responsible for preparation of the annual budget and capital improvement program
 - Part-time on “loan” to the City Manager’s Office for a year working for one of two Assistant City Managers with responsibility for Public Works, Redevelopment, and Airport



Previous Experience

- Financial Resources Division Manager
 - Managed the Finance Department division responsible for budget, debt administration, and business tax
 - Supervised a staff of 14
 - Limited direct exposure to accounting, treasury, purchasing, and other functional areas
 - Actively worked with other division managers to broaden understanding of these areas
 - Supplemented on-the-job training with additional classes (UCLA Extension, GFOA, CSMFO, etc.)



Current Role

- Assistant Finance Director
 - Supervise the department staff of 51 through four division managers
 - Department functional areas include
 - Investment management and financial systems
 - Accounting, treasury, and payroll
 - Budget, debt administration, and business tax
 - Purchasing and risk management
 - Primary job duties include
 - Interdepartmental coordination issues
 - City Council and Committee reports and presentations
 - Mayor, City Council, and community issues
 - Special projects



Other Activities

- CSMFO
 - Member of Professional Standards and Recognition Committee
 - Inland Empire Chapter Chair (2012)
 - Chair of Professional Standards and Recognition Committee (2012)
 - Chair of Career Development Committee (2013-2015)
 - Annual Conference presenter in 2013, 2014, and 2015
 - Budget and CAFR reviewer 2010-Present
- Presenter at CDIAC and other conferences
- Adjunct faculty member, CSU San Bernardino
 - Teach Public Financial Management in the MPA program
- Volunteer advisor for UC Riverside fraternity
- Serve as Board Treasurer for my HOA and a non-profit





Career Progression Highlights

Drew Corbett

Finance Director

City of Menlo Park

Education and Experience



- BA, Political Science, The University of the South (Sewanee, TN)
 - Elementary School Teacher, Compton Unified School District
 - Teach for America Corps Member
 - MBA, University of Wisconsin-Madison
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Previous Experience

- Intel Corporation
 - ~90,000 employees worldwide; \$40B in revenue
 - Senior Financial Analyst/Project Manager
 - Variety of roles and responsibilities
 - Forecasting and close process improvement
 - Web-based cost estimate tool design, development, and implementation
 - Relocation provision design and implementation
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Previous Experience

- City of Sunnyvale
 - ~145,000 residents; \$250M annual budget
 - Full service including some utilities
 - Career progression in Finance Department
 - Budget Analyst
 - Budget Manager
 - Assistant Director of Finance
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Previous Experience

- Assistant Director of Finance
 - Managed functional areas of budget, accounting, accounts payable, and payroll
 - 14 staff members
 - Limited exposure to other functional areas such as purchasing and treasury
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Current Role

- Finance Director, City of Menlo Park
 - ~33,000 residents, \$75M budget
 - Provide most core city services except fire
 - Finance Department responsible for budget, accounting, purchasing, accounts payable, accounts receivable, revenue management, treasury, debt management, payroll, and risk
 - 7 staff members
 - Utilize some consultants and JPIA for risk
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Other Activities

- CSMFO
 - Served 3-year term on Board of Directors
 - Committee involvement
 - Career Development, Membership Benefits, Program, Host, Site Selection
 - Presented at annual conference
 - 2010, 2011, 2012, 2013, 2015
 - Cornerstone Academy San Jose (charter school)
 - Served 3-year term on Board of Directors
 - Guest speaker at San Jose State University and University of San Francisco graduate programs
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Career Progression Highlights

Deborah Lauchner
Chief Financial Officer
City of Santa Rosa

Education and Experience

- BS, Agricultural and Managerial Economics, University of California at Davis
- Agricultural Credit Manager, US Department of Agriculture (1990-1997)
 - Santa Rosa, CA
 - Salinas, CA

Education and Experience

- Assistant Treasurer-Tax Collector,
County of Santa Cruz, CA (1997-2001)
 - \$217 million departmental revenues
 - \$1.5 million department expenditures
 - 17 staff with 5 direct reports
- Finance Manager, City of Rohnert
Park, CA (2001-2007)
 - ~45,000 residents
 - \$22 million budget
 - 10 departmental staff
 - Full Service City

Education and Experience

- Finance Manager, City of Novato, CA
(2007-2011)
 - ~53,000 residents
 - \$46 million budget
 - 6 departmental staff
 - Not a Full Service City – Special Fire District and Special Districts for Utilities
- Finance Director, City of Vallejo, CA
(2011-2014)
 - ~117,000 residents
 - \$200 million budget
 - 32 departmental staff
 - Not a Full Service City – Special Sewer District and Special District for Recreation and Parks

Education and Experience

- Chief Finance Officer, City of Santa Rosa, CA
 - ~177,000 residents
 - \$357 million budget; \$135 million General Fund
 - 63 departmental staff
 - Full Service City