

Dear Finance Officer Applicant:

The City of Excelsior would like to thank you for your interest in the Finance Officer position. Included with this letter are the application materials for this position, which should consist of the following documents:

- 1. A copy of the advertisement.** This is a copy of the advertisement for the position. Do not return this document, keep for your records.
- 2. An Application for Employment form.** Be sure to answer all questions and sign your application. If a question or section of this form does not apply, then write "N/A" in response to that question to indicate that it is Not Applicable. Applications that are not signed or contain blanks may be removed from consideration for incompleteness. Return this document.
- 3. A Veterans Preference Status Form.** Please be sure to complete this form and return it with your application. If the form is not completed preference points will not be applied. Return this document with your application.
- 4. A job description for the position.** This document is included to give applicants an idea of the type of duties that applicants would be responsible for. No action is required of you at this time related to this document. Do not return this document, keep for your records.
- 5. Benefits and Compensation.** The City would like applicants to have as much information as possible about the position. This will provide an outline of the benefits and compensation for this position. Do not return this document, keep for your records.
- 6. Returning Application Packet.** Please return your application packet (completed application, resume, Veterans Preference Status Form, and any other items you wish to submit for consideration for employment) to:

Lynette Peterson, City Clerk
City of Excelsior
339 Third Street
Excelsior, MN 55331-1809

The deadline for applications is 4:00 p.m., CST, Wednesday, May 20, 2020. If you have any questions regarding the position or application packet, you can contact me at (952) 653-3675 or lpeterson@excelsiormn.org.

Sincerely,

Lynette R. Peterson
City Clerk

City of Excelsior- Finance Officer

The City of Excelsior is seeking a fiscally astute, transparent, well-rounded individual to be their next Finance Officer. Excelsior is a vibrant community with a historic downtown located off beautiful Lake Minnetonka. The Finance Officer is responsible for all accounting and financial activities and services for the City. The person sought will be citizen focused and have exceptional communication skills.

Candidates for the Finance Officer position will possess a Bachelor's degree in a related field or equivalent experience in the public sector, and a minimum of two years' experience in finance or accounting. Preferred candidates will have familiarity with Banyon Data Systems software, auditing experience, or advanced education/credentials.

City Hall is open Monday-Thursday from 7:30 am to 5:30 pm and closed on Fridays; attendance at some evening meetings is required. Salary range is \$85,000- \$105,000 DOQ with a competitive benefit package. For a complete application packet, visit our website at www.excelsiormn.org or contact Lynette at lpeterson@excelsiormn.org or at 952-653-3675. Completed application packets and resumes must be received by 4:00 pm CST on Wednesday, May 20th.



City of Excelsior
339 Third Street
Excelsior, MN 55331-1809
Phone (952) 474-5233
Facsimile (952) 474-6300

The City of Excelsior seeks applicants for all positions without regard to race, color, religion, creed, gender, national origin, age, disability, marital or veteran status, or any other legally protected status.

The information requested on this application is being gathered for the purpose of evaluating your fitness and qualification for the employment you are seeking with the City of Excelsior. You are not legally required to provide any of the information requested, but failure to do so could adversely affect your chances of being hired. The information you provide may be provided to the City of Excelsior employees or other appointed or elected officials participating in the process of making a decision regarding the employment you seek. It may also be provided to third parties to the extent necessary to gather additional information relevant to an analysis of your application.

POSITION YOU ARE APPLYING FOR

Job Title: _____

CONTACT INFORMATION

Your name: _____

Mailing Address: _____

City: _____ County: _____ State: _____ Zip Code: _____

Home Phone: () _____ Business Phone: () _____

Cellular Number: () _____ E-Mail Address: _____

EDUCATION

High School (Name): _____ Location: _____

Diploma Other (Specify): _____ Highest Grade Completed: _____

College Graduate? Yes No If no, give total credit received: _____

NAME & ADDRESS OF SCHOOL, MAJOR COURSE OF STUDY, AND DEGREE RECEIVED

Your Name if Different While Attending School: _____

Undergraduate College/University		Graduate School	
_____		_____	
Degree: _____		Degree: _____	
Pertinent Undergraduate Courses	Credits	Pertinent Undergraduate Courses	Credits
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

JOB-RELATED TRAINING AND COURSE WORK

List any skills, licenses, and certificates which are related to the job you seek (including words per minute typing and computer software proficiency.)

WORK EXPERIENCE

Describe your work experience in detail, beginning with the most recent job. Include military service (indicate rank) and job related volunteer work, if applicable. Provide an explanation for any gaps in employment. **All information in this section must be complete. A resume may be attached, but not substituted for this section.**

1. Name of Present or Last Employer: _____

Address: _____ Phone: () _____

Job Title: _____

Number Supervised: _____ Supervisor's Name: _____

From ___/___/___ To ___/___/___ Hours Per Week _____

May we contact this employer? Yes No

Job Duties (give details)

Reason for leaving:

2. Name of Present or Last Employer: _____
Address: _____ Phone: () _____
Job Title: _____
Number Supervised: _____ Supervisor's Name: _____
From ___/___/___ To ___/___/___ Hours Per Week _____
May we contact this employer? Yes No
Job Duties (give details)

Reason for leaving:

3. Name of Present or Last Employer: _____
Address: _____ Phone: () _____
Job Title: _____
Number Supervised: _____ Supervisor's Name: _____
From ___/___/___ To ___/___/___ Hours Per Week _____
May we contact this employer? Yes No
Job Duties (give details)

Reason for leaving:

4. Name of Present or Last Employer: _____
Address: _____ Phone: () _____
Job Title: _____
Number Supervised: _____ Supervisor's Name: _____
From ___/___/___ To ___/___/___ Hours Per Week _____
May we contact this employer? Yes No
Job Duties (give details)

Reason for leaving:

**NOTE TO APPLICANTS: DO NOT ANSWER THIS QUESTION
UNLESS YOU HAVE BEEN INFORMED ABOUT THE
REQUIREMENTS OF THE JOB FOR WHICH YOU ARE APPLYING.**

Are you capable of performing in a reasonable manner, with or without a reasonable accommodation, the activities involved in the job or occupation for which you have applied? A review of the activities involved in such a job or occupation has been given.

Yes No

PLEASE READ THE FOLLOWING STATEMENTS

Authority to Release Information. By my signature, I consent to the release of information to authorized officers, agents, and/or employees of the City of Excelsior which may include but not be limited to information concerning my past and present work, including my official personnel files, attendance records, evaluations, educational records including transcripts; military service; law enforcement records; and/or any personnel record deemed necessary. In addition, I consent to authorize appropriate officers, agents, and/or employees of the City of Excelsior to make inquiries of third parties such as credit bureaus. I further release the organization, educational entity, present and former employers, law enforcement organization, and all third parties from any and all claims of whatever nature that I may have as a result any inquiry or response given to such inquiries made in connection with my application for employment.

Signature: _____ **Date:** _____

Certification of Applicant: By my signature, I affirm, agree, and understand that all statements on this form are true and accurate. Any misrepresentation, falsification, or material omission of information or data on this application may result in exclusion from further consideration or, if hired, termination of employment. If I have requested herein that my present employer may not be contacted, an offer of employment may be conditioned upon acceptable information and verification from such employer prior to beginning work.

Signature: _____ **Date:** _____

**CITY OF EXCELSIOR
ADDENDUM TO APPLICATION**

VETERANS PREFERENCE POINTS APPLICATION INSTRUCTIONS

Preference points are awarded to qualified veterans and spouses of deceased or disabled veterans to add to their exam results. Points are awarded subject to the provisions of Minnesota Statutes 43A.11. To be eligible for veterans preference points, you must:

1. Be separated under honorable conditions from any branch of the armed forces of the United States after having served on active duty for 181 consecutive days or by reason of disability incurred while serving on active duty, and be a citizen of the United States or resident alien; or be the surviving spouse of a deceased veteran (as defined above) or the spouse of a disabled veteran who because of the disability is not able to qualify; AND
2. NOT be currently receiving or eligible to receive a monthly veteran's pension based exclusively on length of military service.

The information you provide on this form will be used to determine your eligibility for veterans preference points. You are not required to supply this information, but we cannot award veterans points without it.

YOU MUST SUPPLY A COPY OF YOUR DD214. DISABLED VETERANS MUST ALSO SUPPLY FORM FL-802 OR AN EQUIVALENT LETTER FROM A SERVICE RETIREMENT BOARD. SPOUSES APPLYING FOR PREFERENCE POINTS MUST SUPPLY THEIR MARRIAGE CERTIFICATE, THE VETERAN'S DD214 AND FL-802 OR DEATH CERTIFICATE.

If you supply the supporting documentation by separate mail, your name and the position applied for must be included.

ARE YOU APPLYING FOR VETERANS BONUS POINTS? YES NO

If you answered "YES", your DD214 or other documentation must be received no later than seven (7) calendar days after the application deadline for the position.

VETERANS PREFERENCE POINTS APPLICATION

Veteran _____ If spouse, veteran's name: _____

Self Spouse

Branch of Service: _____ Period of Active Duty
From: _____ To: _____

Rank at Discharge: _____ Type of Discharge: _____ Date of Final Discharge: _____ Service No: _____

Are you receiving or eligible for a military pension? Do you have a compensable service-related
 YES NO disability? YES NO

Preference requested: Veteran Disabled Veteran
 Spouse of Disabled Veteran Spouse of Deceased Veteran

Your Preference Points application cannot be considered without supporting documentation (see instructions above). If the documentation is not attached, it must be received in our office no later than seven (7) calendar days after the application deadline for the position in order to guarantee that points are awarded in a timely manner.

Supporting documentation: is attached will be submitted within 7 days of application deadline.



Position Title: Finance Officer

Department: Finance

Immediate Supervisor: City Manager

Position & FLSA Status: Full-Time Exempt

Date of Latest Revision: August 2014

POSITION SUMMARY

The Finance Officer is responsible to the City Manager for the organization, planning, administration and coordination of the finance activities of the City including operations such as general accounting, auditing, cash management, purchasing, project accounting, assessment district bond administration, grant administration, and information systems; participates in and coordinates development of the City budget and long-range financial forecasts; coordinates assigned activities with other departments and outside agencies; provides highly responsible and complex administrative support to the City Manager; and demonstrates professional engagement as a contributing member of the Excelsior City staff.

ESSENTIAL DUTIES AND RESPONSIBILITIES *(include but are not limited to the following)*

1. Accepts full responsibility for all Finance Department activities and services including activities associated with general accounting, license and fee collection, utility billing and collection, and payroll; invests funds as authorized.
2. Prepares, manages, and coordinates the development of the City's general budget and capital improvement budget; coordinates the City budget process; develops revenue forecasts and monitors expenditures; discusses and resolves budget issues with appropriate staff.
3. Prepares, submits and administers an approved annual budget including the controls necessary to track budgetary compliance; monitors and approves expenditures; advises appropriate department personnel on budget matters; makes adjustments to the budget as is necessary.

4. Develops and implements an overall investment strategy with supporting policies and procedures that is consistent with sound municipal finance practices and also compliant with all applicable laws and regulations.
5. Develops effective debt management policies, practices and procedures based on appropriately and accurately projecting cash flows, financing sources and cash uses relative to the City's outstanding debt level.
6. Develops the financing mechanisms for acquisitions of capital items and improvement projects as well as the necessary protocols for other outside bonding or financing activities.
7. Works with external auditors to assure compliance with State and Federal requirements.
8. Exercises a work style that promotes collaboration, appropriate staff initiative and creates individual growth opportunities for understanding the basics of the municipal finance functions.
9. Serves as the City's risk manager and works with the City Clerk to ensure prudent insurance coverage types and levels; represents the City on the board of its liability insurance pool; reviews and recommends the adjudication of claims filed against the City; arranges loss control programs to ensure employee health and work place safety. Recommends adequate general property, liability, workers' compensation and other casualty insurance coverage according to City's risk tolerance and maintains up-to-date records with insurance carriers
10. Represents the City at meetings, conferences, legislative sessions, and other assigned public affairs.
11. Keeps informed as to the latest practices in the municipal finance field and establishes new practices, policies and/or procedures that are of benefit to the City and to the public.
12. Establishes and maintains a system of filing and indexing records and reports in sufficient detail to furnish all information necessary for proper control of departmental activities and to form a basis for the periodic reports to the City Council and City Manager.
13. Responsible for the revising and updating of the City's long-term financial plan. Re-evaluating revenue and expenditure assumptions, updating financial trending, demographics, evolution criteria and indexes, and determining and implementing successful alternative financing strategies.
14. Performs other job-related responsibilities as apparent or assigned.

ESSENTIAL TECHNICAL COMPETENCIES

Knowledge of...

- General laws and administrative policies governing municipal financial practices and procedures.
- Operations and services of a comprehensive financial management and accounting program.
- Principles and practices of general, fund and governmental accounting.
- Methods and techniques of revenue analysis and interpretation.
- Operational characteristics of automated financial systems.
- Principles and practices of municipal budget preparation and administration.
- Principles and procedures of financial record keeping and reporting.
- Principles and techniques of managing investments.
- Generally accepted accounting principles.
- Pertinent Federal, State and local laws, codes and regulations.
- Various insurance fields including health, worker's compensation, property and casualty.
- Standard office software and equipment.

Ability to...

- Manage and direct a comprehensive financial management program.
- Analyze and assess programs, policies and operational needs and make appropriate adjustments.
- Identify and respond to sensitive community and organizational issues, concerns and needs.
- Analyze problems, identify alternative solutions, project consequences of proposed actions and implement recommendations in support of goals.
- Research, analyze and evaluate new service delivery methods and techniques.

- Evaluate financial data and recommend improvements.
- Develop and implement automated financial systems.
- Manage the City's investment portfolio including daily investments and long-range investments.
- Prepare clear and concise administrative and financial reports.
- Prepare and administer large and complex budgets.
- Interpret and apply applicable Federal, State and local policies, laws and regulations.
- Communicate clearly and concisely, both orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of work.
- Demonstrate successful decision-making skills.
- Read and interpret insurance policies and laws.
- Administer varied insurance policies.

TYPICAL WORKING ENVIRONMENT AND PHYSICAL REQUIREMENTS

- Work is performed in typical office environment with extended periods of sitting and prolonged use of computer and related equipment. The noise level in the work environment is usually moderate.
- Ability to physically perform essential job functions. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.
- While performing the duties of this job, the employee is regularly required to sit and talk and hear.

SELECTION CRITERIA TO QUALIFY FOR THIS POSITION

Required Job Qualifications:

- Bachelor's degree in accounting, finance, business administration or closely related field or equivalent experience in the public sector.
- Minimum of two years experience in municipal finance/accounting, records management, financial reporting, and investments, or equivalent.
- Current training and experience with the Governmental Accounting Standard Board's pronouncements.
- Practices, principles and procedures of municipal accounting, auditing, budgeting and financial planning at the advanced level.
- Effective demonstration office procedures, methods, and equipment including computers and applicable software applications such as word processing, spreadsheets, and databases.
- Must be bondable.
- Such alternatives to the above qualifications as the City may find appropriate and acceptable.

Desirable Qualifications:

- Familiarity with Banyon Data Systems software.
- Auditing experience.

Benefits

Probationary Period: Six months; other than vacations that have already been scheduled, vacation and sick leave may be used after satisfactory completion of the probationary period.

Health Insurance: The City pays 100% of single coverage and 57% of the total premium for family coverage. The City will also deposit \$1,000 in your Health Savings Account (HSA) on July 1st. The City offers a stipend for opting out of health insurance that is based on the amount of the HSA deductible, which is currently \$2,000.

Dental Insurance: The City pays 100% of single coverage.

Life Insurance: The City purchases \$10,000 worth of life insurance for each employee; you may purchase additional coverage.

Vacation Pay: 80 hours per year (3.08 hours per pay period). This amount increases with longevity.

Sick Leave: One day per month (3.70 hours per pay period).

Holidays: Twelve paid holidays plus one floating holiday.

Associations: The City pays for your annual dues to any relevant associations (contingent on budget, requires annual approval by the City Manager).

Education: The City agrees to support a reasonable annual budget for professional development and continuing education.