AGENDA
Committee on Personnel
Friday, December 18, 2020 @ 3:00 p.m.

Access the meeting via: https://us02web.zoom.us/j/85777560476; ID: 857 7756 0476; Dial In; (312) 626 6799
Email comments prior to the meeting to sherrie.boak@lansingmi.gov
All Council Members will participate virtually, you may contact them prior at city.coucnil@lansiungmi,gov 483-4177

Council Member Hussain, Chairperson
Council Member Spadafore, Vice Chairperson
Council Member Wood, Member
Council Member Garza, Member

1. **Call to Order**
2. **Public Comment on Agenda Items**
3. **Minutes**
   - September 29, 2020
4. **Discussion/Action:**

   A.) DISCUSSION/RESOLUTION- Council Internal Auditor Interviews
   - Larry Trice III
   - Chelan Andrews
5. **Adjourn**

To mitigate the spread of COVID-19 and to provide essential protections to vulnerable Michiganders and this State's health care system and other critical infrastructure, it is crucial that all Michiganders take steps to-limit in-person contact, particularly in the context of large groups. Therefore, the above meetings will be conducted via audio/video conference.

The meetings are being held virtually in accordance with the Open Meetings Act, as amended in an effort to protect the health and safety of the public. Members of the public wishing to participate in the meeting may do so by logging into or calling into the meetings using the website or phone number above, and meeting ID provided. To provide input or ask questions on any item that is listed on the agenda, members of the public may contact the email address listed above under the meeting link.

Persons with disabilities who need an accommodation to fully participate in these meetings should contact the City Council Office at 517-483-4177 (TTY 711) 24 hour notice may be needed for certain accommodations. An attempt will be made to grant all reasonable accommodation requests, DRAFT

MINUTES
Committee on Personnel
Tuesday, September 29, 2020 @ 2:30 p.m.
Via audio/video conference

CALL TO ORDER

The meeting was called to order at 2:31 p.m.

ROLL CALL-Via audio/video conferencing

Council Member Adam Hussain, Chairperson
Council Member Peter Spadafore, Vice Chairperson- arrived at 2:35 p.m.
Council Member Carol Wood, Member
Council Member Jeremy Garza, Member

OTHERS PRESENT- Via audio/video conferencing

Sherrie Boak, Council Staff
Ashley Banks, Hiring Specialist
Lisa Hagen, Assistant City Attorney
Christine Bacon
Courtney Nicholls

Minutes

MOTION BY COUNCIL MEMBER SPADAFORE TO APPROVE THE JULY 7, 2020 MINUTES AS PRESENTED. ROLL CALL VOTE, MOTION CARRIED 4-0.

Discussion

Council Internal Auditor Interview – Christine Bacon

Council Member Hussain briefly outlined the interview process to Ms. Bacon, introduced the Committee Members and staff, and Ms. Bacon introduced herself providing her past and current work experience. The Committee then took turns asking the interview questions.

Council Member Hussain - Tell us about some of your experiences conducting audits within governmental agencies. Ms. Bacon confirmed her limited experience. Council Member Spadafore asked how her experience would fit the role of government auditing. Ms. Bacon outlined her experience with auditing functions and interest in expanding and improving for with municipal finance.

Council Member Spadafore - Please describe how your responsibilities have changed during your career in auditing, and the scope of your current responsibilities in this field. Ms. Bacon provided 6-7 roles in the finance function.

Council Member Garza - Tell us about one or two audits you have coordinated or in which you played a consulting role that resulted in cost savings, streamlined and improved processes and procedures, or policy changes. Ms. Bacon spoke briefly on audits with Texas Railroad Commission and an evaluation to obtain a refund of funds and an opportunity for new procedures.

Council Member Wood - What are some steps you have put in place in your current or previous positions to prevent fraud. Ms. Bacon provided an example of steps her current role took on to create policies for their employees on assets.

Council Member Hussain - Please describe one or two examples where you have used quantitative techniques to analyze samples or populations of data, what kinds of software tools you employed, and how results convinced management to take corrective action. Ms. Bacon outlined processes she uses in pivot tables to look at change and allowed to create a deliverables.

Council Member Spadafore - In your current or most recent auditing work, which Enterprise Resource Planning systems have you used. Ms. Bacon gave an example during her time at DOW where her role in creating an interface on data bases.

Council Member Garza - Please describe how frequently you use ERP systems, and for what purposes. Ms. Bacon acknowledged those programs she has used on a daily basis.

Council Member Wood - Tell us about the audiences receiving your auditing reports in your current position, and discuss your experience in reporting to boards and/or city councils. Ms. Bacon outlined her familiarity with board meetings, closed meetings, presentations with Executive Directors, CEO's and large audiences.

Council Member Hussain - Tell us about your participation in professional associations geared toward the auditing profession. Ms. Bacon acknowledged her roles with the education level for those associations.

Council Member Spadafore - What steps do you take to keep your job knowledge current with ongoing changes in the industry. Ms. Bacon stated there are formal education credits annually, finance sessions, when in financial statutory role had continual education.

Council Member Garza - Discuss approaches that you have used to work harmoniously with people at all levels of an organization while also maintaining independence and objectivity. Ms. Bacon provided examples on her work with other employees and the practices she has used in other jobs.

Council Member Wood - Tell us about a time when you faced challenges in interpersonal communication, conflict, and/or resistance from uncooperative individuals when you were performing auditing and reporting duties, and how you handled that situation. Ms. Bacon's example provided her past experience and where she was able to communicate with them the importance of each of their roles, and explaining financial deadlines to co-workers during her required audits. Council Member Wood asked if she has done any research on this position and how it interacts with the Administration. Council Member Wood explained this role is an employee of City Council, and her work with other departments. Council Member Spadafore explained her role and staffing. Ms. Bacon asked about setting of the schedule. Council Member Spadafore explained the process of requests from Council Members and the potential for an audit Committee. Council Member Wood explained the role with all 8 Council Members and Committees. Mr. Smiertka spoke briefly on the Charter definition on the Internal Auditor.

Council Member Garza - Tell me about a challenge or conflict you faced at work, and how you dealt with it. Ms. Bacon provided an example.

Council Member Garza - How do you deal with pressure or stressful situations, and Ms. Bacon provided an example.

Council Member Garza - Where do you see yourself in 5 years; Ms. Bacon confirmed she is looking forward to moving back to Michigan.

Council Member Garza - What are your greatest strengths/weakness, and she stated her strength as curiosity and her weakness is that she feels she tends to ask questions and can't be comfortable until she understands everything that is going on.

Council Member Hussain acknowledged her interest and outlook in this position, and asked if there was anything she would like to ask. Ms. Bacon asked the Committee if they had goals or where they saw the City in the future. Council Member Spadafore spoke briefly on the ability the Council has to get things done, and address issues with the ability to spend funds. Their goals are always to make sure funds are spent where things are needed for the residents. The challenges is looking at the funds and look at where things should be better. Ms. Bacon asked if there is a steady or decrease in tax revenue and confirmed she has experience in forecasting. Mr. Spadafore provided examples. Council Member Wood answered the question by stating she believes it is important to Council now, whether ordinances or budgets, is to have the analysis is done when making the decision so the Council has this information. Mr. Smiertka asked her experience in FOIA and confidential information. Ms. Bacon was able to answer the question.

Council Member Hussain stated once the Committee makes a decision they will get back with her.

Ms. Bacon left the meeting and Ms. Nicholls entered the meeting.

<u>Council Internal Auditor Interview – Courtney Nicholls</u>
Council Member Hussain briefly outlined the interview process to Ms. Nicholls, introduced the Committee and staff, and asked Ms. Nicholls to provide a brief introduction. Ms. Nicholls spoke briefly about her past work experience in governmental offices including Deputy Clerk, and her current position as the City of Dexter Manager. During this time she stated she found the interest in accounting aspect, getting her CPA and looked forward to making the transition into the municipal financial role. The Committee took turn asking the interview questions.

Council Member Hussain - Tell us about some of your experiences conducting audits within governmental agencies. Ms. Nicolls acknowledged her minimal experience in the auditing aspect, but referenced her 12 years has experience with municipal financials, budget and coding.

Council Member Spadafore - Please describe how your responsibilities have changed during your career in auditing, and the scope of your current responsibilities in this field. Ms. Nicolls gave examples of past experiences of leadership roles. Ms. Nicolls outlined a process she was involved in with the creation of better practices, and cost savings.

Council Member Garza - Tell us about one or two audits you have coordinated or in which you played a consulting role that resulted in cost savings, streamlined and improved processes and procedures, or policy changes. Ms. Nicolls stated she was able to investigate and audit utilities along with taxes as they are applied.

Council Member Wood - What are some steps you have put in place in your current or previous positions to prevent fraud. Ms. Nicolls was able to provide examples of changes that have helped to uncover things in her current job where things might have been missed. Ms. Nicolls supported the idea of transparency.

Council Member Hussain - Please describe one or two examples where you have used quantitative techniques to analyze samples or populations of data, what kinds of software tools you employed, and how results convinced management to take corrective action. Ms. Nicholls spoke briefly on her minimal experience in her current employment role.

Council Member Spadafore - In your current or most recent auditing work, which Enterprise Resource Planning systems are you using, and Ms. Nicholls noted her experience from educational classes.

Council Member Garza - Please describe how frequently you use ERP systems, and for what purposes. Ms. Nicholls acknowledged in her current employment she does not utilize the ERP systems.

Council Member Wood - Tell us about the audiences receiving your auditing reports in your current position, and discuss your experience in reporting to boards and/or city councils. Ms. Nicholls acknowledged in her current role as Dexter Manager and working with that Council regularly.

Council Member Hussain - Tell us about your participation in professional associations geared toward the auditing profession. Ms. Nicholls informed the Committee she has joined the Government Finance Association, and attending MICA trainings as they occur, taken classes in fraud and classes with MICPA.

Council Member Spadafore - What steps do you take to keep your job knowledge current with ongoing changes in the industry. Ms. Nicholls listed the trainings, government notifications, and publications she utilizes to keep current.

Council Member Garza - Discuss approaches that you have used to work harmoniously with people at all levels of an organization while also maintaining independence and objectivity. Ms. Nicholls outlined the steps taken in employee relations.

Council Member Wood - Tell us about a time when you faced challenges in interpersonal communication, conflict, and/or resistance from uncooperative individuals when you were performing auditing and reporting duties, and how you handled that situation. Ms. Nicholls stated she has worked well with fellow employees on how they want to be treated, and communication methods.

Council Member Garza - Tell me about a challenge or conflict you faced at work, and how you dealt with it. Ms. Nicholls explained challenges with residents and conflict resolutions.

Council Member Garza - How do you deal with pressure or stressful situations, and Ms. Nicholls stated in her opinion the best way is to be prepared for the situations.

Council Member Garza - Where do you see yourself in 5 years. Ms. Nicholls stated she saw herself in the government financial world, and she would be able to commute if necessary until she could move closer to Lansing.

Council Member Garza - What are your greatest strengths/weaknesses, at which Ms. Nicholls noted her attention to detail and a weakness could be taking things to heart.

Mr. Smiertka asked her about her experience with the media and requirements of FOIA and open meetings act. Ms. Nicholls confirmed she has worked with FOIA, open meetings act. Mr. Smiertka asked about her accounting standards that she is familiar with, and she responded GASB. She also pointed out that she does have resources in the industry she is willing to connect with.

Council Member Hussain noted to Ms. Nicholls they will hold discussions and let her know the results.

Ms. Nicholls referenced the Charter role of this position, and asked how this position is accepted in the City. Council Member Hussain confirmed it is a Charter position, reports to Council, reviews the business of the City, and works on projects directly from Council Members. Council Member Spadafore noted the administration is making progress on working with the auditor. By nature of the position there always appears to be conflict, but does not need to be confrontational. Council Member Wood added that when asking for information from departments, when Council needs information sooner than later, some departments might not be on the same timeline. That could require this position to put pressure on the need to get information. Ms. Nicholls asked if there was a finance committee. Council Member Spadafore there could be a discussion on that.

Ms. Nicholls left the meeting.

The Committee held brief discussions on the two interviews. Council Member Wood asked if all testing was done and passed, and Ms. Banks confirmed. Council Member Hussain asked if there were people who tested and did not pass. Ms. Banks informed the Committee that there were 6 candidates who could have tested, 2 withdrew, 1 was a no-show and 1 failed the test. Council Member Wood then provided her opinion on the interviews, listed pros and cons with each and admitted she might have follow up questions. Council Member Spadafore provided his opinion on the interviews and listed the points that stood out to him on both.
Council Member Garza provided his opinion on the interviews and their auditing experience. Council Member Hussain outlined the process of the posting, and that the Council leadership had reached out to other applicants that applied for the BWL audit position, the numbers of people who viewed the posting, and noted the interest of working with the position.

Council Member Hussain asked the Committee to forward any additional questions for the applicants, but at this time the two questions to be sent to the applicants by HR would be:
When are your salary expectations?
When would you be able to start if offered the job?

The Committee discussed setting of a meeting the week of October 5, 2020.

Ms. Banks confirmed she can begin the work on the background check, which could take 1 day to 2 weeks. Once the back ground check is complete they will schedule the pre-employment physical.

ADJOURN

The meeting was adjourned 3:45 p.m.
Submitted by, Sherrie Boak, Recording Secretary
Lansing City Council
Approved by the Committee on___________________

EMPLOYMENT APPLICATION

	City of Lansing **124 W Michigan Avenue** **Lansing, Michigan - 48933** http://www.lansingmi.gov (http://www.lansingmi.gov) **Internal Auditor 42**	**Received:** 11/12/20 6:52 PM **For Official Use Only:** QUAL:________ DNQ:________ ☐ Experience ☐ Training ☐ Other:________

PERSONAL INFORMATION

POSITION TITLE: Internal Auditor 42	**Job Number:** 00003
NAME: (Last, First, Middle)	**PERSON ID:** 23961709
ADDRESS: (Street, City, State, Zip Code)	
EMAIL ADDRESS:	

PREFERENCES

SHIFTS YOU WILL ACCEPT:
Day , Weekends

WHAT TYPE OF JOB ARE YOU LOOKING FOR?
Regular

TYPES OF WORK YOU WILL ACCEPT:
Full Time, Part Time

EDUCATION

SCHOOL NAME: Siena Heights University		
LOCATION:(City , State) Adrian, MI	**DID YOU GRADUATE?** ■ Yes ☐ No	**DEGREE RECEIVED:** Bachelor's
MAJOR/MINOR: Business Administration		**UNITS COMPLETED:** 7

SCHOOL NAME: Michigan State University		
LOCATION:(City , State) East Lansing, MI	**DID YOU GRADUATE?** ■ Yes ☐ No	**DEGREE RECEIVED:** Master's
MAJOR/MINOR: Accounting		**UNITS COMPLETED:** 3

WORK EXPERIENCE		
DATES: from January/2015 to Present	**EMPLOYER:** Siena Accounting, CPA, PLLC	**POSITION TITLE:** Financial/Tax Accountant Intern
ADDRESS: (Street, City, State, Zip Code): 11973 Sweetwater Dr, Ste C Grand Ledge, MI 48837		**COMPANY URL:** sienaaccounting.com
PHONE NUMBER: (517) 627-2044	**SUPERVISOR:** Susan Flynn - Vice President of Operations	**MAY WE CONTACT THIS EMPLOYER?** ■ Yes ☐ No
HOURS PER WEEK: 40		
DUTIES: Assist in completing tax returns for clients to ensure maximum refund or minimum tax liability Utilize QuickBooks and Creative Solution Accounting software to maintain up-to-date accounting records Assist with preparation of payroll documents Assist with preparation of information filings such as forms 1096 and 1099-MISC		
REASON FOR LEAVING: Finished Internship		
DATES: from November/2016 to Present	**EMPLOYER:** Michigan Food and Farming Systems	**POSITION TITLE:** Financial Manager
ADDRESS: (Street, City, State, Zip Code): 480 Wilson Rd, Room 172 East Lansing, MI 48824		
PHONE NUMBER: 517-960-3717	**SUPERVISOR:** Lauren Marquardt - Co-Director	**MAY WE CONTACT THIS EMPLOYER?** ■ Yes ☐ No
HOURS PER WEEK: 25	**SALARY:** $2,060.00	

DUTIES:
Financial management:

- Manage a multi-faceted financial picture, which includes grants, donations, sponsorships, membership dues, and equity funds.
- Establish a continuous quality improvement process for MIFFS financial procedures.
-Drive monthly reporting of financial status as well as financial projections.
-Advise Directors on both risks and opportunities within that financial picture.
-Oversee financial grant reporting.
-Oversee filing of tax forms and annual financial review with an independent auditor.
-Support the development of grant budgets for grant applications

Monitor bank accounts (transfers)

-Co-leading the daily financial operations of MIFFS
-Work with the Directors to monitor all grant deliverables, strategic plan deliverables, and related finances.
-Develop processes for scaling up our financial planning capacity
-Work with Office Operations to support payroll as well as the flow of income and expenditures for all organization activities.
-Lead the annual financial review and tax preparation with an outside CPA firm
Grant Financial Management
-Maintain management of grant finances (and corresponding deliverables) ~ ensuring deliverables are completed and reported on time.
-Develop required grant financial reports ~ establish procedures and templates for specific grant reporting processes
Support grants applications.
Develop clear financial reporting templates including but not limited to:
-Annual organizational budgets
-Budget vs. actual for all funding streams
-Funding needs
-Update Quick Book records
-Oversee bi-monthly payroll, expenditures and income
-Continue to review and upgrade all financial procedures
-Maintains payroll information by collecting, calculating, and entering data.
-Updates payroll records by entering changes in exemptions, insurance coverage, savings deductions, and job title and department/division transfers.
-Maintains payroll operations by following policies and procedures; reporting needed changes.

REASON FOR LEAVING:
Ready to pursue career as internal auditor to help sharpen accounting skills.

DATES:	**EMPLOYER:**	**POSITION TITLE:**
from January/2016 to Present	Tabernacle of David Church	Accountant

ADDRESS: (Street, City, State, Zip Code):
2645 W. Holmes Rd
Lansing, MI 48911

PHONE NUMBER:	**SUPERVISOR:**	**MAY WE CONTACT THIS EMPLOYER?**
(517) 882-6866	Paul Elam - General Manager	■ Yes ☐ No

HOURS PER WEEK:	SALARY:	# OF EMPLOYEES SUPERVISED:
15	$600.00	2

DUTIES:
- Administering payrolls and controlling income and expenditure
-Auditing financial information
-Compiling and presenting reports, budgets, business plans, commentaries and financial statements
-Analyzing accounts and business plans
-Prepare payments by verifying documentation, and requesting disbursements
-Reconciles financial discrepancies by collecting and analyzing account information.
-Address and resolve customer queries in timely and accurate manner.

REASON FOR LEAVING:
Pursue auditing position to further expand accounting career.

CERTIFICATES AND LICENSES

Nothing Entered For This Section

SKILLS

OFFICE SKILLS:
Nothing Entered For This Section

OTHER SKILLS:
Excel - Expert - 5 years, 0 months

LANGUAGE(S):
English

■ Speak ■ Read ■ Write

SUPPLEMENTAL INFORMATION

Professional Associations
Volunteer, Tornado Disaster Clean-Up
Professional Associations
Volunteer, Feed the homeless
Honors & Awards
ACTIVITIES: Dean's List, Siena Heights University, 2011 - Present
Honors & Awards
Recipient, Daktronics Award, 2014 & 2015
Honors & Awards
Semi-Finalist, Martin Luther King Service Award, 2014 & 2015

REFERENCES

REFERENCE TYPE:	NAME:	POSITION:
Professional	Paul Elam	

ADDRESS: (Street, City, State, Zip Code)		
EMAIL ADDRESS:		**PHONE NUMBER:** (517) 348-9734
REFERENCE TYPE: Professional	**NAME:** Lauren Marquardt	**POSITION:**
ADDRESS: (Street, City, State, Zip Code)		
EMAIL ADDRESS:		**PHONE NUMBER:** 517-960-3717

Agency - Wide Questions

1. **ELIGIBILITY**

   Are you legally eligible for employment in the United States? Documentation of employment eligibility status will be required upon employment.
   Yes

2. **Are you at least eighteen (18) years of age?**
   Yes

3. **CITY OF LANSING EMPLOYMENT STATUS**

   Are you now, or have you ever been employed by the City of Lansing?
   No

4. **If Yes, enter the following:**
   Start Date
   End Date
   Job Title
   Department

5. **Please check the appropriate box for your current employment status with the City of Lansing.**

6. **NEPOTISM DISCLOSURE**

   Are you related to a current City employee/official?
   No

7. **PREVIOUS APPLICATIONS**

Have you ever applied to the City of Lansing before?
No

8. **If Yes, when?**

9. **GENERAL INFORMATION**

Wage/Salary Desired
70000

10. **Availability to work (select all that apply)**
Monday
Tuesday
Wednesday
Thursday
Friday
Saturday

11. **Hours Available**
8

12. **How did you hear of this vacancy?**
Friend

13. *** Please Specify**
Desiree Kirkland

<u>Job Specific Supplemental Questions</u>

1. **What is your highest level of education?**
Master's Degree

2. **Do you have a Bachelor's degree or equivalent in Accounting, Business Administration or related field?**
YES

3. **How many years of professional experience in auditing, accounting or consulting do you have?**
4 years to 5 years

4. **Do you have certifications in the following?**
None

5. **What is your level of experience with MS Excel?**
Advanced

6. **What is your level of experience with MS Word**
Intermediate

By clicking Accept & Submit, I certify that the information I have given on this form or at any time during the application process, including during any medical examination or interview is true and complete to the best of my knowledge. I understand and agree that any misrepresentation, material omission or falsehood will be cause for rejection of this application and for dismissal, if discovered after I have been hired. I agree to undergo a physical examination including drug/alcohol screening at any time, AFTER A CONDITIONAL OFFER OF EMPLOYMENT IS MADE, at the City's expense, to determine if I can perform the essential functions of this job, with or without reasonable accommodation. I authorize the City of Lansing to verify any statement contained within this application or offered at any time during the application process, including during any medical examination or interview, and by signing below authorize the City to request the release of any information required. If I am hired, I agree to conform to the Personnel Rules of the City of Lansing, and/or the applicable bargaining unit agreement. I agree that if I am hired, my employment is not for any definite term, and my employment and compensation can be terminated with or without cause, and with or without notice, at any time, at the option of either the City of Lansing or myself unless my employment is expressly other than at-will pursuant to a duly-executed collective bargaining agreement or contract. I understand that no representative of the City of Lansing other than the Director of Human Resources or Mayor has any authority to enter into any agreement for employment.

This application was submitted by

Larry M. Trice III

3506 Glasgow Dr. Lansing, MI 48911
Email: larrytriceiii@gmail.com
Phone: 517-402-5364

OBJECTIVE: Focused individual with a Masters in Accountancy. Seeking an internal auditor position to apply excellent communication skill, knowledge of finance and accounting principles and practices, the ability to identify complex problems, and review related information to develop and evaluate options and implement solutions.

EDUCATION: **Masters of Science in Accountancy (MSA)** *Michigan State University, East Lansing, MI*
May 2016
Bachelor of Arts in Business Administration *Siena Heights, Adrian, MI*
Business G.P.A.: 3.8; Cumulative G.P.A.: 3.49
Cum Laude

EXPERIENCE:

Michigan Integrated Food & Farming Systems, *Okemos, MI* ***Financial Manager*** *Oct 2016 – Present*

- Monitoring accounts and preparing activity reports and financial forecasts
- Day-to-day bookkeeping/Overseeing the flow of cash
- Preparing reports as required by law, regulation or company policies
- Grant reporting and submissions
- Assist CPA for audit preparations

Tabernacle of David Church, *Lansing, MI* ***Accountant*** *January 2015 – Present*

- Analyze accounts and business plans
- Compiling and presenting reports, budgets, and financial statements
- Administer payrolls and controlling income and expenditure
- Prepare payments by verifying documentation

Siena Investment Advisor, *Grand Ledge, MI* ***Financial/Tax Accountant Intern*** *January 2015 – April 2015*

- Assist in completing tax returns for clients to ensure maximum refund or minimum tax liability
- Utilize QuickBooks and Creative Solution Accounting software to maintain up-to-date accounting records
- Assist with preparation of payroll documents
- Assist with preparation of information filings such as forms 1096 and 1099-MISC

HONORS/ACTIVITIES: Dean's List, Siena Heights University, 2011 - 2014
Administrator, Tabernacle of David Church Minister of Music, Present

Recipient, Daktronics Award, 2014 & 2015
Semifinalist, Martin Luther King Service Award, 2014 & 2015
Inductee, Sigma Beta Delta, Mar. 27, 2014

EMPLOYMENT APPLICATION

City of Lansing

124 W Michigan Avenue

Lansing, Michigan - 48933

http://www.lansingmi.gov

Internal Auditor 42

Received: 8/17/20 4:48 PM

For Official Use Only:

QUAL:________

DNQ:_________

Experience

Training

Other:_______

PERSONAL INFORMATION

POSITION TITLE:

Internal Auditor 42

Job Number:

00003

NAME: (Last, First, Middle)

PERSON ID:

34620101

ADDRESS: (Street, City, State, Zip Code)

EMAIL ADDRESS:

PREFERENCES

SHIFTS YOU WILL ACCEPT:

, Day , Rotating

WHAT TYPE OF JOB ARE YOU LOOKING FOR?

, Regular

TYPES OF WORK YOU WILL ACCEPT:

, Full Time

EDUCATION

SCHOOL NAME:

Oakland University

LOCATION:(City , State)	DID YOU GRADUATE?	DEGREE RECEIVED:
Rochester, MI	Yes No	Master's

MAJOR/MINOR:	UNITS COMPLETED:
Accounting	5

SCHOOL NAME:

Central Michigan University

LOCATION:(City , State)	DID YOU GRADUATE?	DEGREE RECEIVED:
Mt. Pleasant, MI	Yes No	Master's

MAJOR/MINOR:	UNITS COMPLETED:
Business Administration/ Human Resource Administration	5

SCHOOL NAME:

Baker College

LOCATION:(City , State)	DID YOU GRADUATE?	DEGREE RECEIVED:
Flint, MI	Yes No	Bachelor's

MAJOR/MINOR:	UNITS COMPLETED:
Business Administration/ Human Resource Management	8

WORK EXPERIENCE

DATES:	EMPLOYER:	POSITION TITLE:
from February/2018 to Present	Michigan Department of Treasury/ Financial Review Commission	Financial Specialist 13

ADDRESS: (Street, City, State, Zip Code):	COMPANY URL:
3062 West Grand Boulevard, Suite 2-200 Detroit, MI 48202	https://www.michigan.gov/treasury/0,4679,7-121-1751_51556_77310---,00.html

PHONE NUMBER:	SUPERVISOR:	MAY WE CONTACT THIS EMPLOYER?
313-456-6641	Jessica Thomas - Division Administrator	Yes No

HOURS PER WEEK:	SALARY:
40	$6,756.42

DUTIES:

Function as a senior level specialist to the Commissioners of the Detroit Financial Review Commission (FRC) providing mandatory financial reports as statutorily required under sections 6 and 7 of PA 181 of 2014 such as the Biannual Report for DPSCD to the Governor, PA 181 Annual Compliance Certification for DPSCD and the 949d Annual Boilerplate Report, as statutorily required under Public Act 107 of 2017 and 207 of 2018 Prepare and create memos and reports, provide advice and recommendations to the FRC for the of approval of DPSCD and DPS operational budgets and budget amendments as statutorily required based on financial analyses from deliverables provided by DPSCD Conduct complex financial reviews, analysis and studies on collective bargaining agreements, vendor contractual agreements and travel for the FRC to carry out the duties as statutorily required Prepare and create budget to actual reports and other ad hoc reports at the request of the Commissioners in order to keep the Commissioners abreast of the financial state of DPSCD and the debt requirements of DPS Prepare financial memos and reports that derive from the finance subcommittee and contract subcommittee meeting, follow up with requests and ensure the Commissioners receive the needed information in order to make justified decisions Perform preliminary reviews declaring potential fiscal stress and monthly financial reviews including analyzing budget to actual reports and cash flow actual to projection reports for school districts and public-school academies that are under Treasury's enhanced deficit elimination plan, early warning oversight program and employ proactive approaches to prevent deficits

REASON FOR LEAVING:

N/A

DATES: from January/2015 to February/2018	EMPLOYER: Plante Moran	POSITION TITLE: Assurance Senior External Auditor / In Charge Auditor
ADDRESS: (Street, City, State, Zip Code): 2601 Cambridge Court, Suite 500 Auburn Hills, MI 48326		COMPANY URL: www.plantemoran.com
PHONE NUMBER: 248-375-7100	SUPERVISOR: Steve Neiheisel - Partner	MAY WE CONTACT THIS EMPLOYER? Yes No
HOURS PER WEEK: 50	SALARY: $5,000.00	# OF EMPLOYEES SUPERVISED: 4

DUTIES:

Assigned work and monitored the ongoing progress of the audit team that consisted of two to three audit staff while conducting timely detailed reviews of audit work and documentation Performed financial statement audit, federal fund (A-133/single audit), 401(k) retirement savings plan audit, review, and agreed-upon-procedure engagements in accordance with the Generally Accepted Accounting Principles and Standards Performed testing procedures, detailed testing of transactions for significant account balances and analytical procedures for all balance sheet and income statement accounts, including cash, accounts receivable, fixed assets, prepaid expenses, accounts payable, debt, income, and expenses Prepared financial statements, including audit opinions, notes to the financial statements and supplementary schedules Performed risk assessment, evaluation of internal controls and fraud-based interviews with clientele Adhered to strict deadlines in a fast-paced environment, ability to multitask, including beginning audits while performing finalization procedures for prior audits

REASON FOR LEAVING:

Accepted position at the Michigan Department of Treasury

DATES:	EMPLOYER:	POSITION TITLE:
from December/2008 to December/2017	True Love Christian Ministries	Accounting/Finance Director

ADDRESS: (Street, City, State, Zip Code):

6138 East Nevada
Detroit, MI 48234

PHONE NUMBER:	SUPERVISOR:	MAY WE CONTACT THIS EMPLOYER?
313-369-1870	John Anderson - Owner - Senior Pastor	Yes No

HOURS PER WEEK:

20

DUTIES:

Reconciled bank accounts, prepared monthly journal entries, analyzed general ledger/fund accounts, and prepared quarterly financial statements as required for lenders and internal purposes Responsible for all financial transactions; allocated funds to various departments, administered pay to staff, made deposits, maintained detailed documents in the accounting system producing adequate financial and statistical data for forecasting and management purposes Prepared annual budgets, multi-year estimate budgets and prepared paperwork for audits, grants, charity donors and year-end contribution statements for tax purposes

REASON FOR LEAVING:

Resigned from family business

DATES:	EMPLOYER:	POSITION TITLE:
from June/2014 to January/2015	Fiat Chrysler/ FCA Services	Cost/ Inventory Accountant

ADDRESS: (Street, City, State, Zip Code):

2800 West 14 Mile Road
Royal Oak, MI 48073

PHONE NUMBER:	SUPERVISOR:	MAY WE CONTACT THIS EMPLOYER?
248-368-6925	Nakia George - Accounting Manager	Yes No

HOURS PER WEEK:	SALARY:
45	$4,200.00

DUTIES:

Utilized FCA Mainframe (CHAMPS, ASCM, REGIONS) and SAP systems to research and resolve issues in variance accounts that included quantity and unit of measure discrepancies Researched and updated missing/standard costs to production components that included markup and exchange rates for materials during model year changeover and as needed Performed inventory reconciliations per journal entries to adjust the inventory levels in the ledger to inventory levels for 7 U.S., 2 Canada and 3 Mexico plants as needed Created massive journal entries via ART&MIS and completed journal voucher checklist for management to review and approve for posting Performed monthly closing activities such as clearing suspense accounts and accruals Created, updated, and managed Desktop Training Procedures that aided in efficiently training new staff, cross training staff and per SOX compliance Ensured SOX compliance for Manufacturing Group Assembly department by generating reports via Lotus Notes & Penta SAP of monthly transactions for Corporate Office, Accounting Management, and Auditors' review

REASON FOR LEAVING:

Contract until I returned to Plante Moran

DATES:	EMPLOYER:	POSITION TITLE:
from January/2014 to May/2014	Plante Moran	Assurance Intern

ADDRESS: (Street, City, State, Zip Code):

2601 Cambridge Court, Suite 500
Auburn Hills, MI 48326

PHONE NUMBER:	SUPERVISOR:	MAY WE CONTACT THIS EMPLOYER?
248-375-7100	Kevin Brender - Partner	Yes No

HOURS PER WEEK:	SALARY:
40	$1,250.00

DUTIES:

Performed financial statement audit, review, and agreed-upon-procedure engagements Prepared federal and multi state returns for individuals, partnerships and LLCs Received an offer to start full time in January 2015 on the spot

REASON FOR LEAVING:

Internship ended

DATES:	EMPLOYER:	POSITION TITLE:
from September/2012 to January/2013	Mercedes Benz RDNA	Division Controller Intern

ADDRESS: (Street, City, State, Zip Code):

12120 Telegraph Road
Redford, MI 48239

PHONE NUMBER:	SUPERVISOR:	MAY WE CONTACT THIS EMPLOYER?
313-592-4200	Steve Merkel - Division Controller	Yes No

HOURS PER WEEK:	SALARY:
40	$4,000.00

DUTIES:

Approved purchase authorizations for R& D projects in excess of $1,000,000 and controlled costs by ensuring funds are allocated appropriately within the scope of the project (project management & controlling) Worked extensively in SAP tracking fund commitments against purchase requisitions, created invoices, tracked purchase orders and prepared year-end closing accruals on open purchase orders Created ad hoc reports, presentations and spreadsheets for quarterly billing review and financial planning meetings with senior and project managers Managed 2013 Capital Budget by tracking requests and expenditures in an effort to control approved budget for R&D projects, budget reduced from $2,350,000 to $1,720,000 Managed AUC Capital Assets, placing assets into service monthly and recording quarterly depreciation expense Prepared inter-company wire transfers to Detroit Diesel for equipment and rental expenses

REASON FOR LEAVING:

Internship ended

DATES:	EMPLOYER:	POSITION TITLE:
from October/1994 to December/2008	Chrysler Corporation	Group Leader/ Production Supervisor
ADDRESS: (Street, City, State, Zip Code):		COMPANY URL:
1000 Chrysler Drive Auburn Hills, MI 48326		www.fcagroup.com
PHONE NUMBER:	SUPERVISOR:	MAY WE CONTACT THIS EMPLOYER?
855-563-5635	Joseph Lovell - Center Area Manager - 248-512-2950	Yes No
HOURS PER WEEK:	SALARY:	# OF EMPLOYEES SUPERVISED:
40	$5,500.00	37

DUTIES:

Implemented lean (team) based manufacturing throughout the machining departments trained, coached and developed 35 hourly machine operators and 2 team leaders in continuous improvement processes, team building, problem solving, conflict resolution and business fundamentals Performed process audits and planned production schedules, managed department budgets in excess of $1,000,000 and costs in such areas as labor, tooling, scrap reduction and overtime Conducted weekly presentations to upper level management and customers regarding various process improvements, cost initiatives, lean (smart) manufacturing updates, department budgets, quality initiatives and scorecard reviews Successfully implemented a preventive maintenance program and continuous improvement program within the camshaft machining department that increased throughput and productivity. The camshaft department became the benchmark camshaft department of the entire corporation, I received numerous award and recognitions. Selected to coach and assist with the implementation of lean manufacturing in various facilities in the US and Canada

REASON FOR LEAVING:

Took the Buyout

CERTIFICATES AND LICENSES

Nothing Entered For This Section

SKILLS

OFFICE SKILLS:

Typing: 50 WPM

Data Entry: 220 KPH

OTHER SKILLS:

Caseware/ IDEA Data Analysis - Expert - 5 years, 0 months

Microsoft Office (Word, Excel, Powerpoint) - Expert - 9 years, 0 months

SAP - Intermediate - 2 years, 5 months

Microsoft Access - Intermediate - 2 years, 0 months

ACL Data Analytics - Expert - 2 years, 6 months

LANGUAGE(S):

English

Speak

Read

Write

SUPPLEMENTAL INFORMATION

Volunteer Experience

Active Member for Detroit Treasury Community Outreach Team Chair Captain for two years for Plante Moran's PM Cares team Provide after school tutoring to Detroit Public School students Participated in VITA volunteer tax program that provides tax service for low income and elderly individuals

REFERENCES

REFERENCE TYPE:	NAME:	POSITION:
Professional	Nakia George	Accounting Manager- Fiat Chrysler

ADDRESS: (Street, City, State, Zip Code)

EMAIL ADDRESS:		PHONE NUMBER:
		313-523-6740

REFERENCE TYPE:	NAME:	POSITION:
Professional	Steven Merkel	Division Controller- Mercedes Benz RDNA

ADDRESS: (Street, City, State, Zip Code)

EMAIL ADDRESS:		PHONE NUMBER:
		248-633-5243

REFERENCE TYPE:	NAME:	POSITION:
Professional	Shelbi Frayer	Financial Business Consultant

ADDRESS: (Street, City, State, Zip Code)

EMAIL ADDRESS:		PHONE NUMBER:
		517-881-3410

Agency - Wide Questions

1. ELIGIBILITY

Are you legally eligible for employment in the United States? Documentation of employment eligibility status will be required upon employment.

Yes

2. Are you at least eighteen (18) years of age?

   Yes

3. CITY OF LANSING EMPLOYMENT STATUS

   Are you now, or have you ever been employed by the City of Lansing?

   No

4. If Yes, enter the following:

   Start Date

   End Date

   Job Title

   Department

5. Please check the appropriate box for your current employment status with the City of Lansing.

6. NEPOTISM DISCLOSURE

   Are you related to a current City employee/official?

   No

7. PREVIOUS APPLICATIONS

   Have you ever applied to the City of Lansing before?

   No

8. If Yes, when?

9. GENERAL INFORMATION

   Wage/Salary Desired

   95,000

10. Availability to work (select all that apply)

    Monday
    Tuesday
    Wednesday
    Thursday
    Friday

11. Hours Available

    9am-5pm

12. How did you hear of this vacancy?

    Other *

13. * Please Specify

    City of Lansing Jobs

Job Specific Supplemental Questions

1. What is your highest level of education?

   Master's Degree

2. Do you have a Bachelor's degree or equivalent in Accounting, Business Administration or related field?

   YES

3. How many years of professional experience in auditing, accounting or consulting do you have?

   6 years or more

4. Do you have certifications in the following?

   None

5. What is your level of experience with MS Excel?

   Advanced

6. What is your level of experience with MS Word

   Advanced

By clicking Accept & Submit, I certify that the information I have given on this form or at any time during the application process, including during any medical examination or interview is true and complete to the best of my knowledge. I understand and agree that any misrepresentation, material omission or falsehood will be cause for rejection of this application and for dismissal, if discovered after I have been hired. I agree to undergo a physical examination including drug/alcohol screening at any time, AFTER A CONDITIONAL OFFER OF EMPLOYMENT IS MADE, at the City's expense, to determine if I can perform the essential functions of this job, with or without reasonable accommodation. I authorize the City of Lansing to verify any statement contained within this application or offered at any time during the application process, including during any medical examination or interview, and by signing below authorize the City to request the release of any information required. If I am hired, I agree to conform to the Personnel Rules of the City of Lansing, and/or the applicable bargaining unit agreement. I agree that if I am hired, my employment is not for any definite term, and my employment and compensation can be terminated with or without cause, and with or without notice, at any time, at the option of either the City of Lansing or myself unless my employment is expressly other than at-will pursuant to a duly-executed collective bargaining agreement or contract. I understand that no representative of the City of Lansing other than the Director of Human Resources or Mayor has any authority to enter into any agreement for employment.

This application was submitted by

CHELAN BURKS-ANDREWS

39597 Tunstall Drive
Clinton Township, MI 48038
313-213-5521 cburksan@gmail.com

Senior level Financial Specialist for the Financial Review Commission (FRC) with sole responsibility and financial overview for the oversight for the Detroit Public Schools Community District. Experience performing financial analysis, budget analysis, contract review and external audits for clients with revenues in excess of $500 million. Proven success in managing teams, helping businesses achieve operational success, maintain financial reporting, comply with regulatory requirements, improve internal controls and reduce financial and operational risk. Expertise in federal fund compliance audits, part of the audit team that discovered a $2.7 million-dollar kickback scheme for the largest school district in Michigan.

EDUCATION

Master of Accounting Degree, Oakland University, 2014
Master of Science Degree in Administration, Central Michigan University, 2009
Bachelor of Business Degree in Administration, Baker College, 2005

EXPERIENCE

Michigan Department of Treasury/ Financial Review Commission (FRC), Detroit, MI
February 2018 - Present
Financial Specialist 13

- Function as a specialist to the Commissioners of the FRC providing mandatory financial reports as statutorily required under sections 6 and 7 of PA 181 of 2014 such as the Biannual Report for DPSCD to the Governor, PA 181 Annual Compliance Certification for DPSCD and the 949d Annual Boilerplate Report, as statutorily required under Public Act 107 of 2017 and 207 of 2018
- Prepare and create memos, reports, budget to actuals reports and other adhoc reports, provide analysis and recommendations to the FRC for the of approval of DPSCD and DPS operational budgets and budget amendments as statutorily required based on financial analyses from deliverables provided by DPSCD
- Conduct complex financial reviews and studies on collective bargaining agreements, vendor contractual agreements and travel for the FRC to carry out the duties as statutorily required
- Prepare financial memos and reports that derive from the finance subcommittee and contract subcommittee meeting, follow up with requests and ensure the Commissioners receive the needed information in order to make justified decisions
- Perform preliminary reviews declaring potential fiscal stress and perform monthly financial reviews including analyzing budget to actual reports and cash flow actual to projection reports for school districts and public-school academies that are under Treasury's enhanced deficit elimination plan, early warning oversight program and employ proactive approaches to prevent deficits

Plante Moran, Auburn Hills, MI
January 2015 – February 2018 and January 2014 – May 2014
Assurance Senior External Auditor / In Charge Auditor and Assurance Intern

- Assigned work and monitored the ongoing progress of the audit team that consisted of two to five audit staff while conducting timely detailed reviews of audit work and documentation
- Performed financial statement audit, compliance of federal fund audit, 401(k) retirement savings plan audit, review, and agreed-upon-procedure engagements in accordance with the Generally Accepted Accounting Principles and Standards
- Performed testing procedures, detailed testing of transactions for significant account balances and analytical procedures for all balance sheet and income statement accounts, including cash, accounts receivable, fixed assets, prepaid expenses, accounts payable, debt, income and expenses
- Prepared financial statements, including audit opinions, notes to the financial statements and supplementary schedules
- Performed risk assessment, evaluation of internal controls and fraud-based interviews with clientele
- As an intern performed financial statement audit, review, and agreed-upon-procedure engagements
- As an intern prepared federal and multi state returns for individuals, partnerships and LLCs

Fiat Chrysler/ FCA Services, Sterling Heights, MI
June 2014 – January 2015

Cost/ Inventory Accountant for Fiat Chrysler Automobiles

- Utilized FCA Mainframe (CHAMPS, ASCM, REGIONS) and SAP systems to research and resolve issues in variance accounts that included quantity, unit of measure discrepancies and performed monthly closing activities such as clearing suspense accounts and accruals
- Researched and updated missing/standard costs to production components that included markup and exchange rates for materials during model year changeover and as needed
- Performed inventory reconciliations per journal entries to adjust the inventory levels in the ledger to inventory levels for 7 U.S., 2 Canada and 3 Mexico plants as needed
- Created massive journal entries via ART&MIS and completed journal voucher checklist for management to review and approve for posting
- Created, updated and managed Desktop Training Procedures that aided in efficiently training new staff, cross training staff and per SOX compliance

Mercedes Benz RDNA, eDrive & Powertrain, Redford, MI
September 2012-January 24, 2013
Division Controller Intern

- Approved purchase authorizations for R& D projects in excess of $1,000,000 and controlled costs by ensuring funds are allocated appropriately within the scope of the project (project management & controlling)
- Worked extensively in SAP tracked fund commitments against purchase requisitions, created invoices, tracked purchase orders and prepared year-end closing accruals on open purchase orders
- Managed AUC Capital Assets, recorded and tracked quarterly depreciation expense and managed 2013 Capital Budget by tracking requests and expenditures to control approved budget for R&D projects, budget reduced from $2,350,000 to $1,720,000
- Created ad hoc reports, presentations and spreadsheets for quarterly billing review and financial planning meetings with senior project managers

True Love Christian Ministries, Detroit, MI
December 2008 – December 2017
Accounting/ Finance Director

- Reconciled bank accounts, prepared monthly journal entries, analyzed general ledger/fund accounts, and prepared quarterly financial statements as required for lenders and internal purposes
- Responsible for all financial transactions; allocated funds to various departments, administered pay to staff, made deposits, maintained detailed documents in the accounting system producing adequate financial and statistical data for forecasting and management purposes
- Prepared annual budgets, multi-year estimate budgets and prepared paperwork for audits, grants, charity donors and year-end contribution statements for tax purposes

LEADERSHIP EXPERIENCE

Chrysler Corporation, Detroit, MI
October 1994 - December 2008
Group Leader/ Production Supervisor

- Implemented lean (smart) manufacturing throughout the machining departments, trained, coached and developed 35 hourly machine operators and 2 team leaders in continuous improvement processes such as improving machine cycle time, equipment effectiveness, team building, problem solving, conflict resolution and business fundamentals
- Performed process audits and planned production schedules, managed department budgets in excess of $1,000,000 and costs in such areas as labor, tooling, scrap reduction and overtime
- Conducted weekly presentations to upper level management and customers regarding various process improvements, cost initiatives, lean (smart) manufacturing updates, department budgets, quality initiatives and scorecard reviews
- Successfully implemented a preventive maintenance program and continuous improvement program within the camshaft machining department that increased throughput and productivity. The camshaft department became the benchmark camshaft department of the entire corporation

SKILLS

- CaseWare IDEA Audit Analytics and Data Analysis, ACL Data Analysis, ProSystem FX Tax, SAP, PentaSAP, QuickBooks SB, PeopleSoft, Microsoft Office Applications (Word, PowerPoint, Access), Advanced Excel (V-Lookup, "IF" statements, macros, pivot tables) Lotus Notes, Visio, SharePoint, Think cell

TEAM-Together Everyone Achieves More