

# West Valley Water District

## EXECUTIVE RECRUITMENT FOR **CHIEF FINANCIAL OFFICER (CFO)**



*West Valley Water District's mission is to provide our customers with safe, high quality and reliable water service at a reasonable rate and in a sustainable manner.*



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## ***AN OUTSTANDING CAREER OPPORTUNITY***

The West Valley Water District (WVWD) is seeking a collaborative, engaging and highly qualified Chief Financial Officer (CFO) to lead the district's fiscal management. The CFO will be a key executive responsible for leading the district's financial operations as the District continues its transformation into a best in class water utility that fosters a great work culture and provides outstanding water services to all customers and partners of the West Valley Water District.

## **WEST VALLEY WATER DISTRICT**

West Valley Water District is an independent special district (retail water utility) headquartered in the City of Rialto, California, the 6th largest city in San Bernardino County. The District is a working-class community located 60 miles northeast of Los Angeles and serves approximately 97,000 customers in the Inland Empire.

## **HISTORY OF WEST VALLEY WATER DISTRICT**

The district began on February 28, 1952, when West San Bernardino County Water District was founded and became the owner and operator of three local mutual water companies. During those early years, the district supplied more water for agricultural purposes than for domestic use.

During the 1970s and 1980s, the district grew, and homes, businesses and schools soon surpassed agricultural use. There were other mergers where smaller water companies became a part of the Water District. By the end of the 1980s, the district's water infrastructure included 180 miles of pipeline, 12 reservoirs and 15 water wells. It was during this time that the district built its office and maintenance yard on Baseline Road in Rialto, where they are still located today.

In 1992, the district was a partner in building five miles of new pipeline to bring much-needed water from the Bunker Hill Basin in San Bernardino to their growing service area. Continuing the trend of working with their neighbors, in 1993 the district partnered with the City of Rialto to build a treatment facility for the water flowing from Lytle Creek. The Oliver P. Roemer Water Filtration Facility has been expanded twice and also accepts and treats State Water Project water, which increases the amount of water available for their customers.

In 2003, the name was changed to West Valley Water District. By this time the district had five treatment plants, 360 miles of pipeline, 25 reservoirs, 17 wells, 20,000 service connections, and served drinking water to approximately 66,000 residents.

In 2016, WVWD opened the nation's first perchlorate treatment facility to bring clean water directly to ratepayers using natural, bioremediation technology. WVWD's second perchlorate treatment facility was completed in 2017. In 2018, WVWD opened their hydroelectric generation plant and saw increased housing developments in their service area. Today, the District serves over 80,000 residents and continues to grow.

## **THE DISTRICT**

### ***West Valley Water District Governance***

The West Valley Water District is governed by a five-member Board of Directors, elected by districts for four-year staggered terms. The Board of Directors elects a Board President and Vice President from among the five members, and they both serve two-year terms. The Board develops the policies that governs the district. Meetings are publicly noticed, and citizens are encouraged to attend.

A General Manager is appointed by the Board of Directors to oversee the day-to-day operations of the District in accordance to the policies and procedures established by the Board. The District has a total budget of \$65 million including approximately \$32 million allocated annually for capital improvement projects (CIP) and capital expenditures. The District employs approximately 88 individuals in support of District operations and support functions.

### ***District Services***

The district provides water service to approximately 23,667 connections within its thirty-one (31) square mile service area, located in southwestern San Bernardino County with a small area of northwestern Riverside County. The service area encompasses one half of the City of Rialto, portions of Bloomington, Colton, Fontana, Jurupa Valley, and some of the unincorporated areas of San Bernardino and Riverside counties.

Residential customers represent 93% of the district's customer base and consume approximately 66% of the water provided by the district. The district currently has a total of 17 groundwater wells with a maximum production capacity of approximately 42,000 acre-feet per year. The district also operates a surface water treatment plant with a capacity of 14.4 million gallons per day (MGD) and a biological treatment plant for perchlorate destruction with a capacity of 3.9 (MGD). The district's water distribution system consists of 376.2 miles of transmission and distribution mains, approximately 23,000 service connections, 23 extraction wells, 24 reservoirs, and 12 pump stations.

West Valley Water District obtains water from both local and imported sources to serve its customers. Over half (51%) of the district's water originates from its own groundwater basin wells. Additional groundwater (17%) is purchased from San Bernardino Valley Municipal Water District through the Base Line Feeder Project. This water also comes from local wells in the Bunker Hill Basin. The district obtains 18% of its surface water from Lytle Creek in the San Bernardino Mountains. This water is treated through the District's Oliver P. Roemer Water Filtration Facility. The remaining water (14%) is purchased from the State Water Project through San Bernardino Valley Municipal Water District. This water is also treated through the District's Oliver P. Roemer Water Filtration Facility.

## **WEST VALLEY WATER DISTRICT HAS BEEN RECOGNIZED IN MOST RECENT YEARS**

- Special District Leadership Foundation's District Transparency Certificate of Excellence
- Association of California Water Agencies/Joint Powers Insurance Authority President's Special Recognition Award
- California Municipal Treasurers Association Investment Policy Certification
- Government Finance Officers Association Certificate of Achievement in Excellence for Financial Reporting
- Government Finance Officers Association Distinguished Budget Presentation Award

## **THE OPPORTUNITY**

### ***Chief Financial Officer (CFO)***

Under direction from the General Manager and/or Board of Directors, the CFO provides leadership and management for all financial functions including budgeting, accounting, billing, and customer service and purchasing functions of the District including information and communication systems for these functions; invests and protect the District's assets; maintains effective internal fiscal controls and investment policies; provide highly responsible and complex administrative support to executive leadership; and perform other duties as required or assigned.



### **Essential Duties and Responsibilities**

The duties and responsibilities listed below are intended to provide a representative list of the various types of work that may be performed. Specifications are not intended to reflect all duties performed within the job class, and incumbents may expect to perform other related or similar duties.

- Plans, organizes, coordinates and directs the financial, accounting, billing, customer service and public relations related administrative functions of the district in accordance with Board policies.
- Assists the General Manager, Assistant General Manager, Board of Directors, and Board Committees with long range financial planning, protection of the district's assets, and maintenance of adequate internal financial controls.
- Assists the General Manager with the analysis, preparation, presentation, justification and administration of the district's budget and financial statements.
- Oversees and directs, with the auditor, the preparation and issuance of the WWVD's annual financial reports.
- Oversees and directs cash flow, bond issues, investment activities and assessments for community facility districts.
- Oversees the information systems and communication systems for areas of responsibility; identifies and coordinates technical advancements.
- Attends and participates in District Board meetings, professional organizations, and community meetings; prepares and presents reports.
- Participates in employee selection; directs, trains, develops, evaluates, and disciplines subordinate staff up to and including termination, subject to District policies and practices.
- Serves as a District representative with other local, regional, and governmental agencies.
- Performs special analytical studies; initiates and participates in the analysis and preparation of water rate studies, rate structures and other revenue enhancement programs; and prepares reports and internal policies/procedures as directed by the General Manager and in accordance with Board direction.
- Performs internal audits of District activities; recording of assets and adjusting entries and insures accurate posting to the general and subsidiary ledgers.
- Monitors legislation effecting areas of responsibility and implements necessary changes.



## CHIEF FINANCIAL OFFICER (CFO)

- Responds to and resolve sensitive and complex community and organizational inquiries and complaints.
- Assists in the negotiation of terms of agreements, contracts and other documents on behalf of the district.
- Identifies, maintains, and implements opportunities for cross-department coordination for effective operations; encourages continuing education and development of personnel.
- Develops and maintains a records retrieval system to compliment financial and statistical reports.
- Oversees the financial administration and monitoring of the District's Federal and State Grants.
- Acts as a liaison with District vendors, contractors, and debtors.
- Participates in District safety meetings.
- Performs other related duties, as assigned.

### **Knowledge of:**

- Principles, practices, methods and procedures of budgeting, accounting, controls, auditing, debt administration and financial management in accordance with Generally Accepted Accounting Principles (GAAP).
- Principles of public administration, management, supervision, training, and performance evaluation.
- Pertinent federal, state and local laws, codes, regulations and ordinances affecting District operations and financial activities.
- Application of information technology solutions in the maintenance of accounting records and financial administration.
- Principles of business letter writing and basic report preparation.
- Modern office procedures, methods and equipment including computers.

- Safe work practices.

### **Ability to:**

- Plan, organize, administer, evaluate and coordinate the district's accounting and financial activities.
- Develop and administer goals, objectives, and procedures.
- Interpret, apply and explain District policies and procedures related to Finance, Accounting, Billing and Customer Service activities.
- Lead and coordinate District budget preparation and fiscal controls.
- Oversee the preparation of financial reports and maintenance of ledgers and journals.
- Recommend and implement improvements to existing District activities.
- Prepare and present comprehensive and concise written and oral reports.
- Analyze problems, identify, recommend, and implement solutions.
- Exercise a high degree of managerial and administrative skills.
- Establish and maintain cooperative working relationships with others; deal tactfully and courteously with the public.
- Communicate clearly and concisely, both orally and in writing.
- Operate a vehicle observing legal and defensive driving practices.
- Operate standard office equipment, personal computers, Internet, and Microsoft Office software products.
- Observe proper safety precautions.

## MINIMUM QUALIFICATIONS

Any combination of education, training, and experience that would likely provide the knowledge, skills, and abilities to successfully perform in the position is qualifying. A typical combination includes:

### **Education:**

A Bachelor's degree from an accredited college or university in finance, accounting, business administration or a closely related field; designation as a Certified Public Accountant is desirable; a Master's Degree from an accredited college or university in finance, accounting, business administration or a closely related field is highly desirable.

### **Experience:**

A minimum of five (5) years of progressively responsible professional experience in financial management, accounting, analysis and reporting for a governmental or special district agency of which at least two (2) years were at a lead, supervisory or managerial level. Up to eight (8) years of additional qualifying experience may be substituted for the required education, on a "two for one" basis (two years of experience for one year of education).

### **Necessary Special Requirements**

Must possess an appropriate valid, Class "C" Driver's License issued by the California State Department of Motor Vehicles, and a good driving record.



## TOP PRIORITIES FOR THE CHIEF FINANCIAL OFFICER (CFO)

1. Assess (through internal and special audits) the overall financial operation, customer service and purchasing units, people, and systems, and make recommendations to the General Manager and Board for an organizational structure that supports the delivery of high-quality financial and appropriate administrative functions and services while ensuring overall efficiency and best practices.
2. Develop an operational and strategic plan including the development of standard operating procedures and clear goals and objectives for the district's financial and administrative activities.
3. Conduct customer service audit/survey to enhance the district's customer service delivery activities.
4. Review adequacy of financial controls and investment policies and recommend appropriate changes.
5. Assist in improving District's reputation internally and externally.



## THE IDEAL CANDIDATE

The Chief Financial Officer will provide sophisticated financial acumen in the core management functions of accounting & control, auditing, budgeting & forecasting, financial analysis & planning, debt issuance & treasury management functions, and risk analysis & management. The ideal candidate should be a selfless leader who has a deep and granular understanding of all facets related to astute financial leadership in a complex organization with significant government regulation. Additionally, the next CFO must be able to oversee purchasing and customer service functions.

Candidates must be visionary, mission driven and skilled at using sound judgement, to make thoughtful and practical recommendations to executive leadership and policy makers. In addition to being strategic and tactical, the CFO must be a leader with integrity, values and humility. Of primary importance, WVWD is seeking a finance executive who embraces an authentic leadership style, possesses strong emotional intelligence and understands and prioritizes the critical importance that people play in building a successful organization.

The ideal candidate must be an innovative leader who values working with people, is open minded with superb interpersonal skills and judgement with demonstrated understanding of all financial aspects of an enterprise operation including rate setting; and financial management associated with capital improvement projects.

The selected candidate will possess outstanding leadership, management, delegation, and coaching skills. They must be able to communicate effectively and respectfully to various stakeholders and represent the District at public meetings. Specific characteristics include:

- Inspirational leadership style with proven ability to manage organizational culture transformation;
- Experience managing a unionized workforce in an organization comparable to the size of WVWD;
- In-depth knowledge and understanding of current and future regulatory and environmental compliance issues;

- Demonstrated ability and project management experience with managing financial capital planning and project delivery;
- Excellent people skills and presence to work effectively with and maintain productive relationships with employees at all levels and with various external stakeholders including local, state, and federal regulators and the community;
- Good listener who possesses strong communication skills and has the ability to engage well with others;
- Ability to manage a good working relationship with the governing body;
- Credible leader who is a proven change agent and team builder who gets things done; inclusive leader who is open, fair, trustworthy, and values core competencies of safety, service, and integrity; and values, supports and empowers staff;
- A track record of thoughtful and strategic workforce and resource management that aligns with organizational needs and priorities; and
- A responsive, proactive problem solver who is decisive and leads by example.

### COMPENSATION AND BENEFITS

West Valley Water District offers an attractive salary and an attractive benefits package to the selected candidate based on qualifications and experience. The salary range is \$143,686 to \$235,768.

### APPLICATION & SELECTION PROCESS

The Chief Financial Officer recruitment is being conducted by The Hawkins Company (search consultants). They will review all written materials submitted and will screen and evaluate candidates. Only the most highly qualified candidates will be invited to participate in an on-site interview. Interested and qualified individuals are invited to submit a resume and cover letter of interest electronically to [wvwd.cfo@thehawkinscompany.com](mailto:wvwd.cfo@thehawkinscompany.com). Resumes received by **Friday, August 19, 2022** will receive first consideration.



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Confidential inquiries are encouraged and should be directed to Ms. Yonnine Hawkins Garr at 323-252-1655, [yonnine@thehawkinscompany.com](mailto:yonnine@thehawkinscompany.com) or Ms. Tisa Jones at 213-309-7984, [tisa@thehawkinscompany.com](mailto:tisa@thehawkinscompany.com)