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City of Seattle



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CITY OF SEATTLE

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Director of Finance

**Confirmation Packet
July 25, 2014**

Glen Lee



City of Seattle
Edward B. Murray
Mayor

July 25, 2014

The Honorable Tim Burgess
President, Seattle City Council
Seattle City Hall, 2nd Floor
Seattle, WA 98104

Dear Council President Burgess:

I am pleased to transmit to the City Council the following confirmation packet for my re-appointment of Glen Lee as the Director of Finance. The packet contains Glen Lee's appointment and oath of office forms, his resume, and the press release announcing his re-appointment. His background check is on file from his original appointment.

Glen Lee has served the City of Seattle for 20 years. He was confirmed as the City's Finance Director in 2010. In this role he is responsible for the City's enterprise accounting, treasury, tax administration, debt management, and risk management functions as well as serving on each of the City's three retirement boards. Prior to his service as Finance Director, Glen managed the forecasting and budget development functions in the City Budget Office. Glen has been an excellent steward of the City's finances and I urge you to reappoint him as Director of Finance.

If you have any questions about the attached materials or need additional information, please contact Chris Gregorich of my office, at 206-386-1251, or via e-mail, at chris.gregorich@seattle.gov.

Sincerely,

A handwritten signature in black ink, appearing to read "Edward B. Murray", with a long, sweeping underline.

Edward B. Murray
Mayor, City of Seattle



City of Seattle
Edward B. Murray
Mayor

July 25, 2014

Glen Lee
700 5th Avenue, Floor 43
Seattle, WA 98104

Dear Glen,

It gives me great pleasure to re-appoint you to the position of Director of Finance. All conditions of your Director's appointment continue into your next term.

Your term of office is four years and you serve at the pleasure of the Mayor. Your re-appointment as Director is subject to City Council confirmation. Therefore, you will need to attend the confirmation hearings of the full City Council.

I thank you for your service to date and look forward to working with you in your role as Director of Finance.

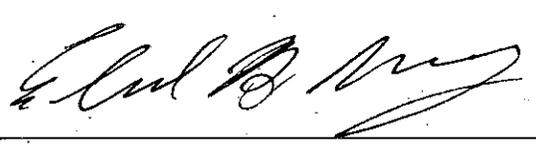
Sincerely,

Edward B. Murray
Mayor of Seattle

cc: Human Resources

City of Seattle

Notice of Appointment

| | |
|---|---|
| Name: Glen Lee | <input checked="" type="checkbox"/> Executive Appointment <input type="checkbox"/> Legislative Appointment |
| Appointed to: Director of Finance | Date of Appointment: 7/25/2014 |
| Authority (Ord., Res.): Seattle City Charter Art. VIII § 1 | Term of Office From: City Council Confirmation To: July 25, 2018 |
| Comments: Glen Lee has served the City of Seattle for 20 years. He was confirmed as the City's Finance Director in 2010. In this role he is responsible for the City's enterprise accounting, treasury, tax administration, debt management, and risk management functions as well as serving on each of the City's three retirement boards. Prior to his service as Finance Director, Glen managed the forecasting and budget development functions in the City Budget Office. Glen has been an excellent steward of the City's finances. | |
| Authorizing Signature:  | Name and Title of Officer Making Appointment: Edward B. Murray, Mayor |
| | |



**CITY OF SEATTLE - STATE OF WASHINGTON
OATH OF OFFICE**

STATE OF WASHINGTON

COUNTY OF KING

I, Glen Lee, swear or affirm that I possess all the qualifications prescribed in the Seattle City Charter and the Seattle Municipal Code for the position of Director of Finance; that I will support the Constitution of the United States, the Constitution of the State of Washington, and the Charter and Ordinances of the City of Seattle; and that I will faithfully conduct myself as *Director of Finance*.

Glen Lee

**Subscribed and sworn to before me
this _____ day of _____, 2014**

(affix seal)

Monica Martinez Simmons, City Clerk

Glen M. Lee
Resume

Summary

Senior Finance Director with a comprehensive background in municipal and state government. Strong leadership skills with broad public sector financial management experience, including economic and revenue forecasting, budget development, employee benefit management, tax administration, and reporting compliance. Proven experience providing elected and senior officials with rigorous, concise analyses to support informed policy and financial decision making.

Employment History

Finance Director, City of Seattle 2010 – present

Manages the City's Financial Division, with over 130 employees. The Division is responsible for administering City taxes; forecasting tax revenues and City employment costs; compiling enterprise financial reports and sets accounting policies; executing payments and processes revenues; managing the City's debt program and investment portfolio; and managing the City's liability insurance programs. In addition, oversees each of the City's retirement systems and the City's partnerships with Public Development Authorities including Pike Place Market.

- Co-sponsor of project to implement a new City-wide financial system
- Oversees the implementation of standard City-wide accounting practices
- Manages the implementation of a new multi-city tax filing system for taxpayers
- Develop and implement new financial and investment policies for City's Employee Retirement System in response to impacts of 2008 recession

Assistant Finance Director, City of Seattle 1999 – 2010

Managed the City's Economics and Fiscal Management team, consisting of eight professionals; oversaw the effort to implement standard practices for accounting and financial reporting, and development of a budget system City-wide; acted as key member of Department of Finance's Executive Management Team.

- Develop forecasts for the Seattle-area economy and the City's approximately \$1 billion in revenues from taxes, fees and fines.
- Estimate costs for City's services, including wage and benefit expenses for City employees.
- Implement guidelines and oversee the process of developing the City's budget.
- Assess fiscal policies proposed or implemented by the State of Washington, King County, and Seattle Public Schools.
- Design and implement information technology systems which assemble financial legislation and the City's budget, as well as report on City financial performance.

Revenue Forecaster, City of Seattle 1994 – 1999

Developed forecasts for revenues from City taxes, fees, and fines.

- Formulated and implemented state-of-the-art procedures for forecasting City revenues.
- Created monthly and quarterly reports about City revenues and expenditures.

Glen M. Lee
Resume

Fiscal and Policy Analyst, California State Legislative Analyst's Office 1991 – 1994
Provided the State Legislature with analyses of State of California tax policies and administration. Assessed state-wide ballot measures regarding State and local fiscal policies. Published descriptions of ballot measures in the state-wide Voters' Pamphlet.

Related Experience

Member, Municipal CFO Forum 2012 – present
A joint endeavor between the University of Chicago Harris School of Public Policy, the Office of the Mayor of the City of Chicago, and the Governing Institute, the semi-annual Municipal CFO Forum is designed to support policy dialogue and create a peer-learning network of CFOs from the nation's largest cities. The forum is funded by the Governing Institute and the University of Chicago.

Member, Streamline Sales Tax Mitigation Advisory Committee 2007 – present
Guide State of Washington's effort to design and implement financial mitigation measures for local government entities which are negatively impacted by reforms to Sales and Use Taxes.

National Trainer, Government Finance Officers Association 2005 – 2009
Developed course on forecasting techniques designed for local government financial officials. Trained more than 200 local officials from across North America.

Staff Analyst, Seattle Public School District
Advisory Committee For Investing In Educational Excellence 2005 - 2006
Supported the Committee's assessment of the financial status of the Seattle Public Schools. Identified substantial and structural financial deficits, which became a core finding in the Committee's final report.

Education

California State University, Sacramento, California
MA Economics (all but thesis), 1991
University of California, Berkeley, California
BS Agricultural Economics, 1984

Volunteer work

President, Seattle – Gdynia, Poland Sister City Association 2004 – 2008
Organized exchanges of students and cultural, business, and political leaders from northern Poland and the Puget Sound region. Managed the Seattle Polish Film Festival; facilitated the exchange of over 100 Seattle-area and Polish high school students; and led a delegation of Seattle-area business and elected officials to Poland in 2005.
Awarded prestigious Amicus Poloniae Award in November 2009 from Ambassador of the Republic of Poland, Robert Kupiecki, for contribution to American – Polish relations.



City of Seattle
Edward B. Murray, Mayor

NEWS RELEASE **FROM THE OFFICE OF THE MAYOR**

FOR IMMEDIATE RELEASE:

Contact: Megan Coppersmith, Mayor's Office Press Secretary, 206-684-8379

Mayor Murray names new acting Human Services Department head

SEATTLE (July 23, 2014) – Seattle Mayor Ed Murray today announced John Okamoto as the new acting Director for the city's Human Services Department (HSD). Okamoto will replace current HSD interim Director Catherine Lester, who will remain with HSD and assist Okamoto in his transition.

"I want to extend my gratitude to Catherine Lester for the great work that she has done since 2011, first as deputy director and then interim director," said Murray. "As the interim director, Catherine successfully led the department through a period of significant change and uncertainty, prospering in many areas. I'm confident John will build upon Catherine's great work as we continue looking for a permanent director."

Okamoto served as Executive Director of the Washington Education Association from 2008 – 2012. He has a long track record of successful leadership positions, and is well known by community, public and business leaders. His extensive management experience includes leadership positions with the Port of Seattle, the Washington State Department of Transportation, and as Director of the former Department of Engineering and former Director of Personnel for the City. [Read his resume here.](#)

"I started my 'calling' in public service in the Human Services Department many decades ago when I was a summer youth worker job developer and counselor. Coming back to HSD is a full circle for me," said Okamoto.

"My family has deep history in elder care programs with the creation of Keiro nursing home, the Midori senior housing and Nikkei Manor assisted living facility. I volunteer with homeless meal and housing programs at Operation Nightwatch and Lord's table," continued Okamoto. "I am deeply passionate about social justice, equity, and inclusion, but I don't have an extensive background in human services, housing, and homelessness issues. It's going to be very important

for me to reach out to our nonprofit service provider community and to other external stakeholders and make sure my leadership is informed by their insights and perspectives.”

Paul Lambros, Executive Director of Plymouth Housing Group, served as Co-Chair of the HSD Search Committee along with Co-Chair Dorothy Mann, a retired public health expert who was Regional Health Administrator, Region X, U.S. Public Health Service from 1979 – 1993. Mann also served two years in the office of Mayor Norman B. Rice as Co-Director of the Mayor's Violence Prevention Project.

“We have tremendous opportunities under Mayor Murray and his administration to have Seattle leading the way across the country in providing innovative social services and in ending homelessness. John will add value by bringing his strategic understanding of systems, diagnosing challenges and new opportunities, and strengthening relationships,” said Lambros.

Estela Ortega, Executive Director of El Centro de la Raza, added, “I’ve known John for many years and know him to be a honest broker who is deeply committed to our immigrant/refugee communities and someone who understands the importance of culturally competent services. I am confident that John’s steady leadership will help the department continue to meet its mission while working collaboratively with our community-based organizations.”

In appointing Okamoto to this interim role, Murray has tasked him to identify where the department can refine its focus, to strengthen partnerships and alignment with other funders, service providers, and stakeholders, and to lay the foundation for transformational change for the next permanent director.

Okamoto’s interim assignment will start on August 1, 2014, with an annualized salary of \$151,000. Lester has agreed to stay on and help with the transition. The search process for the permanent HSD Director will be placed on hold until early 2015, with a goal of identifying a new permanent Director by the middle of next year. Similar to the current process, next year’s search process will also include extensive outreach to service providers and community stakeholders for their input and guidance.

The Human Services Department funds and operates programs and services that meet the basic needs of the most vulnerable people in our community - families and individuals with low incomes, children, domestic violence and sexual assault victims, homeless people, seniors, and persons with disabilities.

Murray also announced the reappointment of Fred Podesta as the Director of the Finance and Administrative Services Department and Glen Lee as Finance Director. Podesta’s annual salary will be \$157,300 and Lee’s annual salary will be \$152,700.