

City of Seattle



Director of Finance

**Confirmation Packet
May 11, 2018**

Glen Lee

FILED
CITY OF SEATTLE
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CITY CLERK



City of Seattle
Mayor Jenny A. Durkan

May 11, 2018

The Honorable Bruce A. Harrell
President, Seattle City Council
Seattle City Hall, 2nd Floor
Seattle, WA 98104

Dear Council President Harrell:

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 24 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 Deputy Mayor David Moseley.

Sincerely,


Jenny A. Durkan
Mayor of Seattle



City of Seattle
Mayor Jenny A. Durkan

May 11, 2018

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,



Jenny A. Durkan
Mayor of Seattle

cc: Seattle Department of Human Resources



SEATTLE CITY COUNCIL

July 9, 2018

Glee Lee, Director of Finance
City of Seattle, Washington

Re: City Council Expectations for the Director of Finance

Dear Mr. Lee,

Congratulations on your re-appointment by Mayor Durkan to serve as the Director of Finance for a term through December 31, 2021. This letter has been filed under Appointment # 01037.

The Council expectations, listed below, are intended to enhance the Finance Director's accountability to the Legislative Branch. The expectations also provide a basis for Council evaluation of the Director if, and when, you are brought forward for reconfirmation after 2021. Council expectations are intended to add to the Mayor's expectations and the director's responsibilities established in the City Charter and Seattle Municipal Code.

I. City Council General Expectations for the Director of Finance.

- A. Relationship with Council. The director is expected to maintain a constructive working relationship with the Council, as demonstrated by:
1. Prompt, complete, and transparent responses to Council information inquiries.
 2. Pro-active updates on policy development, operational concerns and financial matters of significance, so that the Council is informed of significant changes or controversies before the information reaches the media and/or the Executive submits a request for Council action.
 3. Dependable implementation of formal policy direction provided by the Council.
 4. Assistance in the research and development of Council policy initiatives.
- B. Management Skills. The director is expected to demonstrate strong management skills, with particular focus on the following Council priorities:
1. Public Communication
 - a. Conduct inclusive outreach to relevant stakeholders.
 - b. Implement a strong ethic of customer service.

- c. Make information available so that the public can track the department's performance in delivering services.
- 2. Organizational Management
 - a. Coordinate productively with other City departments.
 - b. Maintain strong working relationships with other governmental entities.
 - c. Operate within budget constraints and proactively manage expenditures.
 - d. Provide a fair and equitable approach to the award of City contracts.
- 3. Personnel Management
 - a. Develop and maintain strong morale among department employees.
 - b. Provide an inclusive work environment that offers equitable opportunities for all.
 - c. Address issues of succession planning and the professional development of existing staff.
- 4. Service Delivery -including both routine operations and emergent situations
 - a. Ensure that on-going day-to-day services are provided effectively and efficiently, and that the department tracks its performance in delivering such services.
 - b. Make certain your department is able to deal with localized emergencies or service disruptions and has thoroughly planned how to manage its operations in case of a City-wide emergency.

II. Specific Expectations for the Director of Finance from 2018 through 2021.

During the coming term, the Director is expected to continue providing, and supply regular progress reports on, the following Council expectations:

A. Race and Social Justice. Advance the City's Race and Social Justice Initiative in all aspects of your department's operations, including in career advancement, hiring and contracting.

B. Collaboration with Council. Collaborate and provide technical assistance on Council-initiated projects affecting programs for which you provide management and oversight.

C. Economic and Revenue Forecasting. Develop reporting systems, protocols and timelines (i) to assess local and regional economic performance and trends, and, (ii) to provide local financial performance, revenue collection and forecast information, for the benefit of the City's elected officials.

D. Retirement Board Oversight and Reporting. Develop systems, reporting protocols and reporting timelines to provide guidance to the City's elected officials in their oversight of the Seattle City Employees' Retirement System and the City's other retirement benefits.

E. Quarterly Reports -State Auditor's Office. Develop a reasonable, consistent reporting protocol to assist the City Council and City Departments in managing and responding to audits conducted by the Washington State Auditor's Office.

F. Accounting Systems. Oversee continued development of and ensure stability of the City's updated PeopleSoft 9.2-based Summit financial management system. Develop reasonable and consistent accounting policies and procedures for citywide use and provide training and technical assistance to departments in fully utilizing the City's updated financial management system, to facilitate easier, more consistent citywide financial reports.

G. Tax Compliance, Administration and Simplification. Develop systems, policies and procedures to administer the City's tax and revenue collection programs, focusing on providing efficient and equitable customer service, ease of compliance and to the extent reasonable, develop proposals for tax policy simplification.

H. Use of Debt -Policy Options. In conjunction with the City Budget Director, appropriately manage the City's use and issuance of debt, and provide Council with policy options for the efficient use of short-term and long-term debt. Provide routine reports on the status of the City's debt and debt capacity.

I. Treasury Services. Manage the City Treasury, taking appropriate steps to assure stability, mitigate risk and prudently maximize investment returns from the City's cash pool. Provide routine reports on the status of the City's investments and inter-fund loans.

J. Risk Management. Appropriately manage the City's Risk Management and Judgments and Claims functions, proactively managing risk exposure and implement risk avoidance strategies among City departments with a high volume of claims.

The Director of Finance will be managing the City's financial affairs through many challenges. The Seattle City Council looks forward to working cooperatively with the Director to ensure that the City's elected and appointed decision-makers receive accurate and consistent financial advice and services.

Sincerely,



Sally Bagshaw, Chair,
Finance and Neighborhoods Committee



Bruce Harrell
Council President

Cc: Seattle City Council Members



City of Seattle Department Head Notice of Appointment

Appointee Name: <i>Glen Lee</i>		
City Department Name: <i>Department of Finance</i>		Position Title: <i>Director</i>
<input type="checkbox"/> Appointment OR <input checked="" type="checkbox"/> Reappointment		Council Confirmation required? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Appointing Authority: <input type="checkbox"/> Council <input checked="" type="checkbox"/> Mayor <input type="checkbox"/> Other: <i>Specify appointing authority</i>		Term of Office: <i>Council confirmation to December 31, 2021</i>
Legislated Authority: <i>Seattle City Charter Art. VIII § 1</i>		
Background: Glen Lee has served the City of Seattle for 24 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.		
Date of Appointment: <i>5/11/2018</i>	Authorizing Signature (original signature): 	Appointing Signatory: <i>Jenny A. Durkan</i> 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 _____, 2018**

(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; setting and implementing Citywide financial management policies; compiling enterprise financial reports; executing City payments, including payroll; processing revenues; managing the City's debt program and investment portfolio; and managing the City's liability insurance programs. In addition, the Division provides financial oversight to each of the City's retirement systems as well as the City's partnerships with Public Development Authorities.

- Serves as Executive Sponsor of effort implementing a City-wide financial system.
- Manages the implementation of standard City-wide financial practices.
- Oversees the implementation of a multi-city tax filing system for taxpayers.
- Led City's effort to 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 efforts to implement standard practices for accounting and financial reporting, and develop a City-wide budget development process.

- Developed forecasts for the Seattle-area economy and the City's approximately \$1 billion in revenues from taxes, fees and fines.
- Estimated costs for City's services, including wage and benefit expenses for City employees.
- Implemented guidelines and oversaw the process of developing the City's budget.
- Assessed fiscal policies proposed or implemented by the State of Washington, King County, and Seattle Public Schools.
- Designed and implemented 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 and the Office of the Mayor of the City of Chicago, the annual Municipal CFO Forum supports policy dialogue and creates a peer-learning network of CFOs from the nation's largest cities. The forum is funded by the University of Chicago.

Member, FileLocal Executive Board 2014 – present
The Board oversees the implementation and operations of a multi-city tax filing system. The system is a web-based portal that allows entities to obtain business licenses and pay business taxes for several cities in western Washington.

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 structural financial deficits, a core Committee finding.

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
Mayor Jenny A. Durkan

NEWS RELEASE

FROM THE OFFICE OF THE MAYOR

FOR IMMEDIATE RELEASE:

Contact: Kamaria Hightower, Mayor's Office, Kamaria.Hightower@seattle.gov

Mayor Durkan Announces New Department Appointments

Seattle (Dec 22) - Mayor Jenny A. Durkan announced several new department leaders in her administration, including many with a focus on economic development and City planning.

With the previously announced resignation of Jesús Aguirre, Superintendent of Seattle Parks and Recreation, Mayor Durkan announced that Christopher Williams will serve as Acting Superintendent, effective January 13, 2018, as a search process for a permanent head begins. Williams currently serves as the Deputy Parks Superintendent.

With the resignation of Susan Coskey, Director of the Seattle Department of Human Resources, Mayor Durkan announced that Melissa Beatty will serve as Acting Director, effective January 3, 2018. Beatty currently serves as Chief of Staff at Seattle Department of Human Resources. Durkan will launch a search process to find a candidate for the permanent position.

"Both Susan and Jesús have served our City well for years, and I want to thank each of them for their dedication and vision," said Durkan. "I have a bold agenda for Seattle, and our department leaders across the city will work closely with me to deliver results on our most urgent challenges of housing, homelessness and transportation and to ensure our City is striving for workplace equity. Through every department, our administration will be focused on tackling the affordability crisis from all angles, delivering services to our residents and businesses, and continuing to seize opportunities to build a better future for all of Seattle."

In addition, Mayor Durkan announced that Lily Wilson-Codega will serve as the Director of the Office of Intergovernmental Relations, subject to confirmation by the City Council, effective January 8, 2018. Wilson-Codega is currently the Political Director of Teamsters Joint Council 28, the parent body of twelve Teamster Locals representing Union members across Washington State, Alaska, and northern Idaho. Chris Gregorich will continue working in the Durkan administration as an advisor at Department of Finance and Administrative Services focused on major projects including expansion of the Washington State Convention Center.

As Mayor Durkan evaluates the City's approach to solving homelessness, she announced that George Scarola has moved into a role as a strategic advisor for homelessness response at the Department of Finance and Administrative Services, which also aligns with the 2018 budget passed by City Council.

Additionally, Mayor Durkan announced several officials who will continue to serve in their roles including:

- Sam Assefa, Director of the Office of Planning and Community Development
- Kate Becker, Director of the Office of Film + Music
- Randy Engstrom, Director of the Office of Arts and Culture
- Jessica Finn Coven, Director of the Office of Sustainability & Environment
- Ben Noble, Director of the Budget Office
- Marshall Foster, Director of the Office of the Waterfront
- Glen Lee, City Finance Director
- Nathan Torgelson, Director of the Department of Construction and Inspections

"Our City has many unique opportunities as we are continuing to grow and plan for the future. Working together, we will work to keep our economy thriving, our businesses growing, and our neighborhoods affordable," concluded Durkan.

Last week, Durkan [announced](#) many department leaders and previously [announced](#) a number of public safety and utility officials who would serve in her administration.

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