

County of Lassen
ADMINISTRATIVE SERVICES

HI



CHRIS GALLAGHER

District 1

DAVID TEETER

District 2

JEFF HEMPHILL

District 3

AARON ALBAUGH

District 4

TOM HAMMOND

District 5

Richard Egan

County Administrative Officer
email: coadmin@co.lassen.ca.us

County Administration Office
221 S. Roop Street, Suite 4
Susanville, CA 96130
Phone: 530-251-8333
Fax: 530-251-2663

March 11, 2020

TO: Board of Supervisors
Agenda Date: March 17, 2020

FROM: Richard Egan, County Administrative Officer

SUBJECT: Lassen County Auditor

A handwritten signature in blue ink, likely belonging to Richard Egan.

RECOMMENDATION: Make an appointment to fill the vacancy of Lassen County Auditor.

PRIOR BOARD ACTIONS: At your March 10, 2020, regular meeting, the Board conducted interviews for the position of Lassen County Auditor.

DISCUSSION: An open and competitive recruitment was conducted for the position of Lassen County Auditor. Three applications were received prior to the recruitment deadline; the Board conducted interviews with those candidates on March 10, 2020. Copies of the candidates' applications and supporting materials are attached to the memorandum for your information.

The Board of Supervisors should fill this vacancy as soon as possible, preferably at this meeting of March 17. A prolonged vacancy of this position could hinder the ability of other County officers and offices to complete financial transactions that are necessary for conducting regular county business.

FISCAL IMPACT: None.

OTHER AGENCY INVOLVEMENT: None.

ALTERNATIVES: None.

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COUNTY OF LASSEN

We are an Equal Opportunity Employer that values the strength of a Diverse Workplace

RECEIVED

FEB 18 2020

Lassen County Personnel

Please use a typewriter or print in ink. This application must be completed in full. All statements will be subject to verification.

1. POSITION APPLYING FOR (Give Exact Title as Listed on Job Bulletin) 2. Promotional (If Appropriate)

LASSEN COUNTY AUDITOR

3. Name: (Last) (First) (Middle)

MORGAN JULIE

4. Telephone: Home: [REDACTED]

(Work) cell or message **251-8333**

(Please circle one option)

Email address: [REDACTED]

5. Mailing Address (If you move, notify the Personnel Dept. of your new address & telephone number)

Street: [REDACTED] City: **SUSANVILLE** State: **CA** Zip: **96130**

6. Please check the type, area and shift which you will accept. Check at least one in each category. Do not check those which you are not sure you are willing to accept. (Employees are subject to reassignment during employment.)

TYPE OF JOB AREA SHIFT

☒ Full Time ☐ Part Time ☒ Susanville ☐ Westwood ☐ Bieber ☒ Days 8-5 ☐ Swing ☐ Nights

☐ Temporary ☐ On Call ☐ Ravendale ☐ Standish ☐ Rotating ☐ Weekends

7. U.S. Military Record- For Veteran's Preference

Branch of Service: _____ Enlistment Date: _____ Discharge Date: _____ Type of Discharge: _____

(Month/Day/Year) (Month/Day/Year)

COPY OF DD-214 MUST BE ATTACHED TO APPLICATION FOR VETERAN'S PREFERENCE

8. Are you now employed with Lassen County as a permanent or Probationary employee? ☒ YES ☐ NO

9. Are you now employed with Lassen County as an Exempt or Extra Help employee? ☐ YES ☒ NO

10. If hired, can you present evidence of your U.S. citizenship or proof of your legal right to live and work in this country? ☒ YES ☐ NO

IF YOU RESPOND "YES" TO QUESTIONS 11 or 12 BELOW, YOU MUST EXPLAIN YOUR RESPONSES IN DETAIL ON AN ATTACHED SHEET.

11. Have you previously been employed by the County of Lassen? ☒ YES ☐ NO

12. Have you ever been fired or forced to resign from previous employment? Explain the circumstances and list dates. ☐ YES ☒ NO

13. Language Ability - Please check those that indicate your ability (Optional)

☐ Spanish ☐ Other: _____

☐ Understand ☐ Understand

☐ Speak ☐ Speak

☐ Read & Write ☐ Read & Write

14. Do you possess a valid Driver's License? ☒ YES ☐ NO

CLASS "A" Number: _____

CLASS "B" Number: _____

CLASS "C" * Number: [REDACTED]

* Standard Driver's License

15. Computer Proficiency (If more space is needed, attach additional sheet)

Computer Skills Names of Programs

☒ Word Processing _____

☒ Spreadsheet _____

☐ Database _____

☐ Programming _____

Keyboarding Words Per Minute _____

16. Title & Number of other licenses, certificates or other credentials, if required for this examination.

Title: **CPA**

License: _____

Certificate or _____

Other Credentials: _____

Number: **74491**

Exp. Date: **12/31/20**

17. Education (Check Highest Grade Completed)

High School: 8 9 10 11 **12** G.E.D.

Graduate Work? YES NO

College: 1 yr. 2 yr. 3 yr. **4 yr.**

COLLEGES/UNIVERSITIES ATTENDED	LOCATION	UNITS COMPLETE		MAJOR SUBJECT	DEGREE	NUMBER OF YEARS ATTENDED
		SEM	QTR			
CSU SACRAMENTO	SACRAMENTO, CA			ACCOUNTING	BS	4.5

Applicant Name: MORGAN, JULIE

Resumes will not be accepted in place of a completed application, they may be attached in addition to Employment Application.

18. EMPLOYMENT HISTORY:

You should respond **completely** to the information requested in this section and attempt to cover all the requirements listed in the examination announcement. Show employment for at least last 10 years and explain any gaps in time. LIST YOUR MOST RECENT EMPLOYMENT FIRST. Describe different positions held with the same employer in different blocks, showing dates etc. Additional sheets should be attached to this application when necessary to fully describe related experience, training, and education.

Name of Employer: <u>LASSEN COUNTY</u>		Telephone No.: <u>251-8833</u>
Address of Employer: (Street, City, State & Zip) <u>221 S ROOP ST, STE 4, SUSANVILLE, CA 96130</u>		
DATES EMPLOYED Mo Day Yr Mo Day Yr From: <u>9/14/2004</u> To: <u>1/1</u>		Description of Duties: <u>BUDGET/FISCAL/INFORMATION SERVICES</u>
Job Title: <u>ASST. TO THE CAO</u>		
Total Months Week	Hours per Week	Name and Title of your Supervisor: <u>RICHARD EGAN, CAO</u>
May We Contact This Employer? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO		Reason for Leaving:
Name of Employer: <u>JULIA GUSSETT, CPA PC</u>		Telephone No.: <u>250-3775</u>
Address of Employer: (Street, City, State & Zip) <u>145 S LASSEN ST, SUSANVILLE, CA 96130</u>		
DATES EMPLOYED Mo Day Yr Mo Day Yr From: <u>1/1/20</u> To: <u>1/1</u>		Description of Duties: <u>TAX PREPARATION/OFFICE</u>
Job Title: <u>TAX PREPARER</u>		
Total Months Week	Hours per Week	Name and Title of your Supervisor: <u>JULIA GUSSETT</u>
May We Contact This Employer? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO		Reason for Leaving:
Name of Employer: <u>JULIE MORGAN, CPA</u>		Telephone No.: <u>[REDACTED]</u>
Address of Employer: (Street, City, State & Zip) <u>[REDACTED], SUSANVILLE, CA 96130</u>		
DATES EMPLOYED Mo Day Yr Mo Day Yr From: <u>1/1/2005</u> To: <u>12/31/2019</u>		Description of Duties: <u>TAX PREPARATION</u>
Job Title: <u>OWNER</u>		
Total Months Week	Hours per Week	Name and Title of your Supervisor: <u>SELF-EMPLOYED</u>
May We Contact This Employer? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO		Reason for Leaving:
Name of Employer:		Telephone No.:
Address of Employer: (Street, City, State & Zip)		
DATES EMPLOYED Mo Day Yr Mo Day Yr From: <u>/ /</u> To: <u>/ /</u>		Description of Duties:
Job Title:		
Total Months Week	Hours per Week	Name and Title of your Supervisor:
May We Contact This Employer? YES <input type="checkbox"/> NO <input type="checkbox"/>		Reason for Leaving:

19. CERTIFICATE OF APPLICANT (Read Carefully Before Signing)

I hereby certify that all statements made in this application are true and correct. I understand that this application will be used in determining my qualifications to advance to further stages of competition. I authorize investigation of all matters contained in this application. I agree and understand any mis-statement or omission of material fact on this application will cause forfeiture, on my part, of all rights of employment with Lassen County. I further agree to be fingerprinted, submit to an Alcohol & Drug test and/or a complete medical examination and to furnish such proof of meeting the conditions of employment as may be required.

☐ I understand the County may check my credit or other public records. By marking this box, I request to review copies of these records if they are obtained.

Signature: Julie Morgan

Date: 2/17/2020

COUNTY OF LASSEN

AUTHORIZATION TO RELEASE INFORMATION

I have applied for a position with Lassen County. I understand and agree that part of the employment decision process is an investigation and verification of information I have provided or will provide in my application for employment and during my employment interviews. I understand that these investigations will be conducted by Lassen County and/or its authorized agents to assist Lassen County in determining my qualification for the position I am seeking.

I request and authorize you to furnish the County of Lassen, or its designated representatives, any and all personnel records and information, whether or not such information is maintained by you in writing that you may have including my work record, performance evaluations, and disciplinary matters. Such information shall include but not be limited to all of the circumstances surrounding any termination/cessation of my employment with you or with any other employer. This release shall supersede any agreement I might have with you to not disclose information concerning my employment.

I release and hold harmless you, your officers, and employees, the County of Lassen and its officers and employees from any and all liability and damage, which may result from furnishing the information requested above.

This authorization is a continuing one; if I am hired by Lassen County, it shall remain in effect during the entire period of my employment and may be used by Lassen County at any time it deems appropriate.

I further agree that a copy of this release may be treated as conveying the same authority as the signed original.

Applicant's Name (please print): JULIE MORGAN

Applicant's Signature: Julie Morgan

Date: 2/17/2020

Position Sought: LASSEN COUNTY AUDITOR

February 17, 2020

Lassen County
Attn: Board of Supervisors
221 S Roop Street
Susanville, CA 96130

Dear Board Members:


I am applying for the position of Lassen County Auditor, as I am aware the current Auditor will be retiring soon. The position seems to fit very well with my education, experience, and career interests.

I have a degree in Accounting and experience working with accounting, budget management, information services, purchasing, and policy implementation, including working with you, an elected Board of Officials. I am a Certified Public Accountant (CPA), licensed 1997 in California. My attached resume provides more detail on my qualifications.

My background and career goals match your job requirements well. I am confident that I can perform the job effectively. As a Lassen County resident and employee, I am genuinely interested in the position and in continuing to further my career while continuing to work for Lassen County.

Thank you for considering my application and experience and I look forward to a conversation to discuss further my qualifications and this opportunity.

Sincerely,


Julie Morgan

Attachments: Application and Resume

JULIE M. MORGAN

Susanville, CA 96130

Phone

RESUME

PROFESSIONAL EXPERIENCE:

2004 – Present **Lassen County**, Assistant to the CAO

- Prepare and administer annual operating budget of over \$100 million with approximately 420 full time employees.
- Responsible for administrative activities of the Lassen County Administrative Office.
- Department Head for Internal Services Division, director of supervisor and staff.
- Established goals for and review performance of four employees.
- Participated in development of fiscal, strategic, and organizational plans.
- Directly responsible for general services functions including purchasing, facilities services, contract management.
- Helped develop policy and administrative direction.
- Prepare reports for the department and presented at the Board of Supervisors meetings.
- Participated in a new budget process by which preliminary budget is developed by a committee of the Board of Supervisors.
- Oversight of grant and special programs.

2020 – Present **Julia Gussett, CPA, P.C.**; Tax Preparer

2004 – 2019 **Julie M. Morgan**, Tax Preparation, Owner

1997 – 2004 **Haws, Theobald and Auman, CPA, P.C.**; Accountant

- Plan and work on audits of local governments.
- Bookkeeping oversight and preparation of financial statements.
- Billing and special tax project work.

1992 – 98 **Lassen Union High School**; Softball and Basketball Coach;

1994 – 97 **Carol Jean Curry, CPA**; Accountant

1992 – 94 **Stephen Pezzullo, CPA, P.C.**; Accountant

1988 – 91 **California Department of Forestry and Fire Protection**; Firefighter

1986 **Lassen County**, Office Assistant

EDUCATION:

1997 – Present Certified Public Accountant, Licensed by the California State Board of Accountancy
License #74491

1987 – 1991 California State University, Sacramento; B.S. in Accounting
Graduated Cum Laude

ACTIVITIES:

- * American Institute of Certified Public Accountants
- * California Society of Certified Public Accountants
- * International City and County Managers Association
- * Beta Alpha Psi (National Accounting Fraternity, Professional, Honorary)
- * Beta Gamma Sigma (National Honor Society)
- * California State University, Sacramento intercollegiate softball team
- * Golden Key National Honor Society, (Honorary), Top 10% - all Colleges
- * Accounting Society, Gold Member, Publicity Committee
- * Sigma Kappa (Social), Founder of Chapter at Sacramento
- * Beta Sigma Phi (International Service Organization)

SUPPLEMENTAL QUESTIONNAIRE - LASSEN COUNTY AUDITOR
(REQUIRED SUBMITTAL BY ALL APPLICANTS)

INSTRUCTIONS: Answer all questions. Attach backup documentation, if applicable.

1. Do you understand that you must be a resident of, and a registered voter in, Lassen County, at the time of appointment?

☒ YES ☐ NO

2. Do you understand that the position you are applying for is an elected position which, when there is a vacancy, the Board of Supervisors is authorized to fill by appointment for the remainder of the elected term; that the successful appointee's ability to hold the position thereafter is dependent on their ability to run for office and be elected?

☒ YES ☐ NO

3. Qualified candidates must meet one of the four "QUALIFICATIONS OF THE OFFICE" to be considered. Please indicate which one or more of the following qualifications of the office that you possess:

☒ I possess a valid certificate issued by the California Board of Accountancy under Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code showing the person to be, and a permit authorizing the person to practice as, a certified public accountant or as a public accountant.

☒ I possess a baccalaureate degree from an accredited university, college, or other four-year institution, with a major in accounting or its equivalent, as described in subdivision (a) of Section 5081.1 of the Business and Professions Code, and I have served within the last five years in a senior fiscal management position in a county, city, or other public agency, a private firm, or a nonprofit organization, dealing with similar fiscal responsibilities, for a continuous period of not less than three years.

☐ I possess a certificate issued by the Institute of Internal Auditors showing that I am a professional internal auditor, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.

☐ I have served as county auditor, chief deputy county auditor, or chief assistant county auditor for a continuous period of not less than three years.

4. If appointed to the position of Auditor, do you acknowledge the following: 1. You must complete at least 40 hours of qualifying continuing education for each two year period. 2. You must complete at least 10 hours each year of the two year period. 3. At least 20 hours of the required 40 hours must be obtained in governmental accounting, auditing, or related subjects.

☒ YES ☐ NO

SUPPLEMENTAL QUESTIONNAIRE - LASSEN COUNTY AUDITOR
(REQUIRED SUBMITTAL BY ALL APPLICANTS)

INSTRUCTIONS: Answer all questions. Attach backup documentation, if applicable.

5. Please describe your experience interpreting, applying, and ensuring compliance with applicable guidelines, laws, rules, and regulations, including the California Government Code pronouncement of the Governmental Accounting Standards Board (GASB), Financial Accounting Standards Board (FASB), and provisions of the Generally Accepted Accounting Principles (GAAP), Statements on Auditing Standard Board (SAS), Government Auditing Standards (GAS), Generally Accepted Auditing Standards (GAAS), California Revenue and Taxation Code, the California Government Code, policies and regulations of the Securities and Exchange Commission (SEC), and the Municipal Securities Rulemaking Board (MSRB). If you need additional space, please attach your answer to this application/questionnaire.
6. Please describe your supervisory experience related to personnel management, staff development, and training. Specify the number of staff and types of positions you supported, the scope of your duties performed (i.e. any experience with hiring, training, performance management, and/or discipline), and how long you held those responsibilities. If you need additional space, please attach your answer to you application.
7. Please describe your experience with preparing and presenting your subject matter expertise to groups and or governing boards and committees (e.g. presentations to the Board of Supervisors, District Board, City Council, etc.). Include details regarding your approach to presenting ideas and recommendations, and the steps you took to ensure a complete and successful presentation. If you need additional space please attach your answer to your application.
8. Do you acknowledge that you must attach a resume, letter of interest, and answers to the supplemental questions to your application in order to be considered for the appointment?

☒ YES ☐ NO

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February 17, 2020

Supplemental Questionnaire – Lassen County Auditor

5. I keep up my continuing education for my CPA license, which includes 80 hours every two years. I am very familiar with all of the applicable guidelines, laws, rules, and regulations. I have been working on financial and accounting issues for Lassen County for the past 15 years. This work includes Government Code familiarity and County policies and procedures. I spent the 12 years prior to working for Lassen County auditing schools and special districts.

6. I have supervised three to four employees for the past 15 years, doing evaluations, developing staff and providing training for them. I have been on interview panels for Administration, the Information Services Department, and the Auditor's office.

7. I have attended many Board of Supervisors meetings and have presented Budgets to the Board for the past 15 years. In the past several years much of the budget work is completed by the Budget Committee of which I have prepared agendas, presentations, minutes and supporting information prior to presenting the budget information at the Board of Supervisors meetings. I have also presented to the Board technology recommendations to enhance our Information Services Department and its goals.



COUNTY OF LASSEN

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RECEIVED

FEB 14 2020

Lassen County Personnel

Please use a typewriter or print in ink. This application must be completed in full. All statements will be subject to verification.

1. POSITION APPLYING FOR (Give Exact Title as Listed on Job Bulletin)		2. Promotional (If Appropriate)									
Auditor											
3. Name: (Last) (First) (Middle)		4. Telephone:									
Morrison, Taya Nichole		Home: _____									
		Work, cell or message: _____									
		(Please circle one option)									
		Email address: tmorrison@co.lassen.ca.us									
5. Mailing Address (If you move, notify the Personnel Dept. of your new address & telephone number)											
Street: _____ City: Susanville State: CA Zip: 96130											
6. Please check the type, area and shift which you will accept. Check at least one in each category. Do not check those which you are not sure you are willing to accept. (Employees are subject to reassignment during employment.)											
TYPE OF JOB AREA SHIFT											
<input checked="" type="checkbox"/> Full Time <input type="checkbox"/> Part Time <input checked="" type="checkbox"/> Susanville <input type="checkbox"/> Westwood <input type="checkbox"/> Bieber <input checked="" type="checkbox"/> Days 8-5 <input type="checkbox"/> Swing <input type="checkbox"/> Nights											
<input type="checkbox"/> Temporary <input type="checkbox"/> On Call <input type="checkbox"/> Ravendale <input type="checkbox"/> Standish <input type="checkbox"/> Rotating <input type="checkbox"/> Weekends											
7. U.S. Military Record- For Veteran's Preference											
Branch of Service: _____ Enlistment Date: _____ Discharge Date: _____ Type of Discharge: _____ (Month/Day/Year) (Month/Day/Year)											
COPY OF DD-214 MUST BE ATTACHED TO APPLICATION FOR VETERAN'S PREFERENCE											
8. Are you now employed with Lassen County as a permanent or Probationary employee? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO											
9. Are you now employed with Lassen County as an Exempt or Extra Help employee? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO											
10. If hired, can you present evidence of your U.S. citizenship or proof of your legal right to live and work in this country? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO											
IF YOU RESPOND "YES" TO QUESTIONS 11 or 12 BELOW, YOU MUST EXPLAIN YOUR RESPONSES IN DETAIL ON AN ATTACHED SHEET.											
11. Have you previously been employed by the County of Lassen? <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO											
12. Have you ever been fired or forced to resign from previous employment? Explain the circumstances and list dates. <input type="checkbox"/> YES <input checked="" type="checkbox"/> NO											
13. Language Ability - Please check those that indicate your ability (Optional)		14. Do you possess a valid Driver's License? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO									
<input type="checkbox"/> Spanish <input type="checkbox"/> Other: _____		CLASS "A" Number: _____									
<input type="checkbox"/> Understand <input type="checkbox"/> Understand		CLASS "B" Number: _____									
<input type="checkbox"/> Speak <input type="checkbox"/> Speak		CLASS "C" * Number: _____									
<input type="checkbox"/> Read & Write <input type="checkbox"/> Read & Write		* Standard Driver's License									
15. Computer Proficiency (If more space is needed, attach additional sheet)		16. Title & Number of other licenses, certificates or other credentials, if required for this examination.									
Computer Skills Names of Programs		Title: _____									
<input checked="" type="checkbox"/> Word Processing All County Systems		License _____									
<input checked="" type="checkbox"/> Spreadsheet _____		Certificate or _____									
<input checked="" type="checkbox"/> Database _____		Other Credentials: _____									
<input checked="" type="checkbox"/> Programming _____		Number: _____ Exp. Date: _____									
Keyboarding Words Per Minute _____											
17. Education (Check Highest Grade Completed)											
High School: 8 <input type="checkbox"/> 9 <input type="checkbox"/> 10 <input type="checkbox"/> 11 <input type="checkbox"/> 12 <input type="checkbox"/> G.E.D. <input type="checkbox"/> College: 1 yr. <input type="checkbox"/> 2 yr. <input type="checkbox"/> 3 yr. <input type="checkbox"/> 4 yr. <input checked="" type="checkbox"/>											
COLLEGES/UNIVERSITIES ATTENDED		LOCATION		UNITS COMPLETE		MAJOR SUBJECT		DEGREE		NUMBER OF YEARS ATTENDED	
				SEM QTR							
Heald College		Hayward, Ca				Computer Bus. Admin		Yes			
University of Phoenix		Reno, Nv				Bus. Management		Yes			

Applicant Name: Taya Nichole Morrison

Resumes will not be accepted in place of a completed application, they may be attached in addition to Employment Application.

18. EMPLOYMENT HISTORY:

You should respond **completely** to the information requested in this section and attempt to cover all the requirements listed in the examination announcement. Show **employment for at least last 10 years and explain any gaps in time**. LIST YOUR MOST RECENT EMPLOYMENT FIRST. Describe different positions held with the same employer in different blocks, showing dates etc. Additional sheets should be attached to this application when necessary to fully describe related experience, training, and education.

Name of Employer: Lassen County Auditor		Telephone No.: (530) 251-8236	
Address of Employer: (Street, City, State & Zip) 221 S. Roop Street Susanville, Ca 96130			
DATES EMPLOYED Mo Day Yr Mo Day Yr From: 03 / / 08 To: Present		Description of Duties: My duties have included all areas of the auditor's office duties, for example Benefits, payroll, Software, Budget, Grants, Special districts, Bank Pairs, Property tax, State reporting, Supervision of AP staff, and more	Job Title: Accountant Auditor
Total Months 11yrs 11months	Hours per Week 40+	Name and Title of your Supervisor: Diana Wemple Auditor	May We Contact This Employer? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO
		Reason for Leaving: N/A	
Name of Employer: Little Rascals Hideout		Telephone No.: N/A	
Address of Employer: (Street, City, State & Zip) [REDACTED]			
DATES EMPLOYED Mo Day Yr Mo Day Yr From: 09 / / 05 To: 03 / / 08		Description of Duties: State licensed in-home childcare Supervise staff, State reporting, Record keeping, Meal prep, Curriculum prep, In-home inspections, Staying in compliance with law's and regulations	Job Title: Owner
Total Months 3yrs	Hours per Week 60+	Name and Title of your Supervisor: Self	May We Contact This Employer? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO
		Reason for Leaving: Economy	
Name of Employer: Bianchi Preschool		Telephone No.: (925) 838-8541	
Address of Employer: (Street, City, State & Zip) 909 Camino Ramon Danville, Ca 94526			
DATES EMPLOYED Mo Day Yr Mo Day Yr From: 04 / / 01 To: 08 / / 05		Description of Duties: Manage a classroom of 12 children Planned and prepared curriculum, Held parent/teacher conferences, Organized graduations, etc.	Job Title: Pre-K Teacher
Total Months 4yrs	Hours per Week 40	Name and Title of your Supervisor: Karen Vanmeter Director	May We Contact This Employer? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO
		Reason for Leaving: Relocated	
Name of Employer:		Telephone No.:	
Address of Employer: (Street, City, State & Zip)			
DATES EMPLOYED Mo Day Yr Mo Day Yr From: / / To: / /		Description of Duties:	Job Title:
Total Months	Hours per Week	Name and Title of your Supervisor:	May We Contact This Employer? YES NO
		Reason for Leaving:	

19. CERTIFICATE OF APPLICANT (Read Carefully Before Signing)

I hereby certify that all statements made in this application are true and correct. I understand that this application will be used in determining my qualifications to advance to further stages of competition. I authorize investigation of all matters contained in this application. I agree and understand any mis-statement or omission of material fact on this application will cause forfeiture, on my part, of all rights of employment with Lassen County. I further agree to be fingerprinted, submit to an Alcohol & Drug test and/or a complete medical examination and to furnish such proof of meeting the conditions of employment as may be required.

☒ I understand the County may check my credit or other public records. By marking this box, I request to review copies of these records if they are obtained.

Signature:

Date: 02-14-20

1/2018

COUNTY OF LASSEN

AUTHORIZATION TO RELEASE INFORMATION

I have applied for a position with Lassen County. I understand and agree that part of the employment decision process is an investigation and verification of information I have provided or will provide in my application for employment and during my employment interviews. I understand that these investigations will be conducted by Lassen County and/or its authorized agents to assist Lassen County in determining my qualification for the position I am seeking.

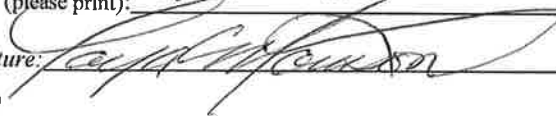
I request and authorize you to furnish the County of Lassen, or its designated representatives, any and all personnel records and information, whether or not such information is maintained by you in writing that you may have including my work record, performance evaluations, and disciplinary matters. Such information shall include but not be limited to all of the circumstances surrounding any termination/cessation of my employment with you or with any other employer. This release shall supersede any agreement I might have with you to not disclose information concerning my employment.

I release and hold harmless you, your officers, and employees, the County of Lassen and its officers and employees from any and all liability and damage, which may result from furnishing the information requested above.

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I further agree that a copy of this release may be treated as conveying the same authority as the signed original.

Applicant's Name (please print): Taya Nichole Morrison

Applicant's Signature: 

Date: 02-14-20

Position Sought: Auditor

SUPPLEMENTAL QUESTIONNAIRE - LASSEN COUNTY AUDITOR
(REQUIRED SUBMITTAL BY ALL APPLICANTS)

INSTRUCTIONS: Answer all questions. Attach backup documentation, if applicable.

1. Do you understand that you must be a resident of, and a registered voter in, Lassen County, at the time of appointment?

YES

2. Do you understand that the position you are applying for is an elected position which, when there is a vacancy, the Board of Supervisors is authorized to fill by appointment for the remainder of the elected term; that the successful appointee's ability to hold the position thereafter is dependent on their ability to run for office and be elected?

YES

3. Qualified candidates must meet one of the four "QUALIFICATIONS OF THE OFFICE" to be considered. Please indicate which one or more of the following qualifications of the office that you possess:

I possess a valid certificate issued by the California Board of Accountancy under Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code showing the person to be, and a permit authorizing the person to practice as, a certified public accountant or as a public accountant.

☒ I possess a baccalaureate degree from an accredited university, college, or other four-year institution, with a major in accounting or its equivalent, as described in subdivision (a) of Section 5081.1 of the Business and Professions Code, and I have served within the last five years in a senior fiscal management position in a county, city, or other public agency, a private firm, or a nonprofit organization, dealing with similar fiscal responsibilities, for a continuous period of not less than three years.

I possess a certificate issued by the Institute of Internal Auditors showing that I am a professional internal auditor, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.

I have served as county auditor, chief deputy county auditor, or chief assistant county auditor for a continuous period of not less than three years.

4. If appointed to the position of Auditor, do you acknowledge the following: 1. You must complete at least 40 hours of qualifying continuing education for each two year period. 2. You must complete at least 10 hours each year of the two year period. 3. At least 20 hours of the required 40 hours must be obtained in governmental accounting, auditing, or related subjects.

YES

SUPPLEMENTAL QUESTIONNAIRE - LASSEN COUNTY AUDITOR
(REQUIRED SUBMITTAL BY ALL APPLICANTS)

INSTRUCTIONS: Answer all questions. Attach backup documentation, if applicable.

5. Please describe your experience interpreting, applying, and ensuring compliance with applicable guidelines, laws, rules, and regulations, including the California Government Code pronouncement of the Governmental Accounting Standards Board (GASB), Financial Accounting Standards Board (FASB), and provisions of the Generally Accepted Accounting Principles (GAAP), Statements on Auditing Standards Board (SAS), Government Auditing Standards (GAS), Generally Accepted Auditing Standards (GAAS), California Revenue and Taxation Code, the California Government Code, policies and regulations of the Securities and Exchange Commission (SEC), and the Municipal Securities Rulemaking Board (MSRB). If you need additional space, please attach your answer to this application/questionnaire.

Over the last eleven plus years in the Auditor's office I have had to follow and report to all guidelines, laws, rules, and regulations listed in this question. With my increasing responsibilities as I have received promotions over the years my knowledge and involvement of enforcement has grown.

6. Please describe your supervisory experience related to personnel management, staff development, and training. Specify the number of staff and types of positions you supported, the scope of your duties performed (i.e. any experience with hiring, training, performance management, and/or discipline), and how long you held those responsibilities. If you need additional space, please attach your answer to your application.

As a pre-K teacher for four years, I had to supervise parents, staff, and children. As well as special programs, that participated with our facility. As a business owner, I had one employee. This employee had trainings and legal requirements that needed to be met and renewed. In my current position, I have had to facilitate and organize trainings to all staff in the office and other departments. Special districts need to be supervised and trained regularly. I have been supervising AP staff for five years.

7. Please describe your experience with preparing and presenting your subject matter expertise to groups and or governing boards and committees (e.g. presentations to the Board of Supervisors, District Board, City Council, etc.). Include details regarding your approach to presenting ideas and recommendations, and the steps you took to ensure a complete and successful presentation. If you need additional space please attach your answer to your application.

Preparing and presenting started for me at University of Phoenix. This facility required presentations weekly to different individuals and environments. Over the years of being a student, I became very comfortable preparing and presenting information and projects. Working with some children, I would have to prepare progress reports to present to parents. In my current position, I have put together

SUPPLEMENTAL QUESTIONNAIRE - LASSEN COUNTY AUDITOR
(REQUIRED SUBMITTAL BY ALL APPLICANTS)

INSTRUCTIONS: Answer all questions. Attach backup documentation, if applicable.

manuals and presentations for training. For example, I have created a special district manual with legal requirements and guidelines. After the manual was created, I visited to each district during their normal board meeting. I presented to the board and their audience, with manual and answered all questions.

8. Do you acknowledge that you must attach a resume, letter of interest, and answers to the supplemental questions to your application in order to be considered for the appointment?

YES

|||||

Taya N Morrison
[REDACTED]
Susanville, CA 96130
(530) 251-8125 Work
[REDACTED]

February 14, 2020

Lassen County
221 S. Roop Street
Susanville, CA 96130

I am interested in the position of Auditor. Within my current position as Accountant Auditor I have gained the experience necessary for the position of Auditor. Comprehensive knowledge of financial record keeping and state reporting is very important in my current position. I also have experience from running my own business for three years. I am very dedicated and self-motivated. I enjoy working together with individuals to get a job complete.

Over the last eleven years, I have worked for the Auditor's office I have worked in the majority of the office positions. I started as a clerk, and then quickly promoted up through the ranks. I worked hard to master each position, which makes my knowledge and value to this office invaluable.

I have completed my Bachelor of Science degree in Management from University of Phoenix. I also have an Associate's Degree in Computer Business Administration from Heald College. I have eleven years of experience working in the Auditor's office and I am interested in furthering a career in business.

I feel that with my office and communication skills, as well as, my own experience as a team member in the Auditor's office, I would be an asset in this new position of Auditor. I have many ideas and goals to improve the office and hope to have the opportunity to execute them. I appreciate your consideration of my application for this position.

Sincerely,



Taya Morrison

Taya N. Morrison

Susanville, CA 96130

Objective: To apply extensive experience in business, processing, and management skills. Utilize strong organizational, communication, and interpersonal relation skills, in a challenging, professional and stable environment.

Experience:

March 2008 to Present: Admin Assistant

Lassen County Auditor, Susanville CA

- Accounts Payable and Accounts Receivable.
- Special districts: Budget creation, Account Auditing
- Process important and confidential situations from start to finish
- Provide input on program area policies, goals and procedures
- County Bank Pays, import of Lassen Works, College, and School checks, cancel checks, CIV process, stale dates, and journal entries
- Assist with budget preparation and monitoring department budgets throughout the fiscal year.
- Supervisor of Account Clerk, and Sr. Account Clerk Staff.
- Monitor and file state reporting
- Prepare monthly reports and conduct internal audits
- Sales tax and EDD reporting.
- Grant organizing, tracking, and auditing of all county grants
- Property Tax Manager

September 2005-March 2008: Business Owner

Little Rascals Hideout, Susanville CA

- Provided State Licensed in-home Daycare for 12 children
- Recommend and implement improvements and modifications; prepare various reports on operations and activities.
- Perform detailed work and maintain appropriate records and statistics.
- Participate in the selection of staff; provide and coordinate staff training; work with employees to correct deficiencies; implement discipline procedure and program modifications as necessary to meet stated goals and objectives

April 2001-August 2005: Pre-Kindergarten Teacher

Bianchi Preschool, Danville CA

- Provided customer service, resolved customer conflicts, trained employees, and answered phones
- Managed a classroom of 12 children, planned and prepared all classroom curriculum, held parent/teacher conferences
- Respond to complaints and requests for information from the public and staff.
- Maintain State Mandated Regulations

Education: Heald College, Hayward CA

Associate in Applied Science Degree in Computer Business Administration
Awarded in 2003

University of Phoenix, Reno NV

Bachelors of Science in Business Management
Awarded in 2012

Computer Skills: Word, Excel, PowerPoint, Lassen Financial System, FileZilla, Crest,
50+ wpm

Other Experience: *Policy council and hiring board (Head Start Facility), Site Council (Shaffer Elementary School) Junior S Club (Soroptimist of Susanville)*



COUNTY OF LASSEN

We are an Equal Opportunity Employer that values the strength of a Diverse Workplace

RECEIVED

FEB 14 2020

Lassen County Personnel

Please use a typewriter or print in ink. This application must be completed in full. All statements will be subject to verification.

1. POSITION APPLYING FOR (Give Exact Title as Listed on Job Bulletin) 2. Promotional (If Appropriate)

Lassen County Auditor

3. Name: (Last) (First) (Middle)

Pearce

Loretta

J

4. Telephone:

Home:

Work, cell or message

(Please circle one option)

Email address:

5. Mailing Address (If you move, notify the Personnel Dept. of your new address & telephone number)

Street: City: Susanville State: Ca Zip: 96130

6. Please check the type, area and shift which you will accept. Check at least one in each category. Do not check those which you are not sure you are willing to accept. (Employees are subject to reassignment during employment.)

TYPE OF JOB

- ☒ Full Time ☐ Part Time
☐ Temporary ☐ On Call

AREA

- ☒ Susanville ☐ Westwood ☐ Bieber
☐ Ravendale ☐ Standish

SHIFT

- ☒ Days 8-5 ☐ Swing ☐ Nights
☐ Rotating ☐ Weekends

7. U.S. Military Record- For Veteran's Preference

Branch of Service: Enlistment Date: Discharge Date: Type of Discharge:

COPY OF DD-214 MUST BE ATTACHED TO APPLICATION FOR VETERAN'S PREFERENCE

8. Are you now employed with Lassen County as a permanent or Probationary employee? ☒ YES ☐ NO

9. Are you now employed with Lassen County as an Exempt or Extra Help employee? ☒ YES ☐ NO

10. If hired, can you present evidence of your U.S. citizenship or proof of your legal right to live and work in this country? ☒ YES ☐ NO

IF YOU RESPOND "YES" TO QUESTIONS 11 or 12 BELOW, YOU MUST EXPLAIN YOUR RESPONSES IN DETAIL ON AN ATTACHED SHEET.

11. Have you previously been employed by the County of Lassen? ☒ YES ☐ NO Currently Assistant Auditor from 3/2017 to current

12. Have you ever been fired or forced to resign from previous employment? Explain the circumstances and list dates. ☐ YES ☒ NO

13. Language Ability - Please check those that indicate your ability (Optional)

- ☐ Spanish ☒ Other: English
☐ Understand ☒ Understand
☐ Speak ☒ Speak
☐ Read & Write ☒ Read & Write

14. Do you possess a valid Driver's License? ☒ YES ☐ NO

CLASS "A" Number:

CLASS "B" Number:

CLASS "C" * Number:

* Standard Driver's License

15. Computer Proficiency (If more space is needed, attach additional sheet)

- Computer Skills Names of Programs
☒ Word Processing Microsoft Word
☒ Spreadsheet Microsoft Excel
☒ Database Munis Software
☐ Programming

Keyboarding Words Per Minute 55

16. Title & Number of other licenses, certificates or other credentials, if required for this examination.

Title: License Certificate or Other Credentials:

Number: Exp. Date:

17. Education (Check Highest Grade Completed)

High School: 8 ☐ 9 ☐ 10 ☐ 11 ☐ 12 ☒ G.E.D. ☐

Graduate Work? YES ☐ NO ☐

College: 1 yr. ☐ 2 yr. ☒ 3 yr. ☐ 4 yr. ☐

COLLEGES/UNIVERSITIES ATTENDED

LOCATION

UNITS COMPLETE
SEM QTR

MAJOR SUBJECT

DEGREE

NUMBER OF YEARS ATTENDED

Napa Junior College

Napa California

Business Accounting

N/A

2

Applicant Name: Loretta J Pearce

Resumes will not be accepted in place of a completed application, they may be attached in addition to Employment Application.

18. EMPLOYMENT HISTORY:

You should respond **completely** to the information requested in this section and attempt to cover all the requirements listed in the examination announcement. Show employment for at least last 10 years and explain any gaps in time. LIST YOUR MOST RECENT EMPLOYMENT FIRST. Describe different positions held with the same employer in different blocks, showing dates etc. Additional sheets should be attached to this application when necessary to fully describe related experience, training, and education.

Name of Employer: County of Lassen		Telephone No.: (530) 251-8320
Address of Employer: (Street, City, State & Zip) 221 South Roop Street, Susanville, Ca 96130		
DATES EMPLOYED Mo Day Yr Mo Day Yr From: 03 / 20 / 2017 To: / /		Description of Duties: Assists the County Auditor in the overall management and Coordination of the activities and operations of the Auditor's Office
Job Title: Assistant Auditor		
Total Months 35	Hours per Week 40	Name and Title of your Supervisor: Diana Wemple, Auditor
May We Contact This Employer? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO		Reason for Leaving: Still employed
Name of Employer: Lassen Community College		Telephone No.: (530) 251-8811
Address of Employer: (Street, City, State & Zip) 478-200 CA-139, Susanville, CA 96130		
DATES EMPLOYED Mo Day Yr Mo Day Yr From: 06 / 01 / 2013 To: 03 / 17 / 2017		Description of Duties: Coordinate and participate in recruitment, hiring, background checks, EEO on committees, Maintain Personnel employee contracts. Process employee information into NoGov. Manage benefits packages. Review and approve payroll.
Job Title: Human Resources Technician		
Total Months 45	Hours per Week 40	Name and Title of your Supervisor: Vickie Ramsey Human Resources Director
May We Contact This Employer? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO		Reason for Leaving: Accepted a position with the County of Lassen
Name of Employer: Lassen Community College		Telephone No.: 530-251-8811
Address of Employer: (Street, City, State & Zip) 478-200 CA-139, Susanville, CA 96130		
DATES EMPLOYED Mo Day Yr Mo Day Yr From: 03 / 01 / 2011 To: 06 / 01 / 2013		Description of Duties: Processed Payroll, Reconciled and Filed 941, DE-9 and W-2. Reconciled bank statements. Reconciled Account Receivables, prepared monthly financial statements performed all financial requirements if bookstore and cafe.
Job Title: Accountant Tech II		
Total Months 27	Hours per Week 40	Name and Title of your Supervisor: Terry Bartley
May We Contact This Employer? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO		Reason for Leaving: Changed to Human Resources Technician
Name of Employer: Northeastern Rural Health Clinics		Telephone No.: (530) 257-5000
Address of Employer: (Street, City, State & Zip) 1850 Spring Ridge Road, Susanville, CA 96130		
DATES EMPLOYED Mo Day Yr Mo Day Yr From: 08 / / 2002 To: 12 / / 2011		Description of Duties: Supervised fiscal staff, handled recruiting and training of finance department, Implemented HR Software, managed leave accruals, prepared monthly financial statements, reconciled GL, maintained weekly cash-flows spreadsheets, developed and maintained financial policies and procedures.
Job Title: Seinor Accountant		
Total Months 112	Hours per Week 40	Name and Title of your Supervisor: Garrett Taylor
May We Contact This Employer? <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO		Reason for Leaving: Worked at Lassen Community College and NRHC for 9 months. Needed to go down to one full time job.

19. CERTIFICATE OF APPLICANT (Read Carefully Before Signing)

I hereby certify that all statements made in this application are true and correct. I understand that this application will be used in determining my qualifications to advance to further stages of competition. I authorize investigation of all matters contained in this application. I agree and understand any mis-statement or omission of material fact on this application will cause forfeiture, on my part, of all rights of employment with Lassen County. I further agree to be fingerprinted, submit to an Alcohol & Drug test and/or a complete medical examination and to furnish such proof of meeting the conditions of employment as may be required.

☐ I understand the County may check my credit or other public records. By marking this box, I request to review copies of these records if they are obtained.

Signature: Loretta Pearce

Date: 2/17/20

COUNTY OF LASSEN

AUTHORIZATION TO RELEASE INFORMATION

I have applied for a position with Lassen County. I understand and agree that part of the employment decision process is an investigation and verification of information I have provided or will provide in my application for employment and during my employment interviews. I understand that these investigations will be conducted by Lassen County and/or its authorized agents to assist Lassen County in determining my qualification for the position I am seeking.

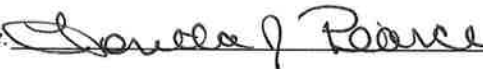
I request and authorize you to furnish the County of Lassen, or its designated representatives, any and all personnel records and information, whether or not such information is maintained by you in writing that you may have including my work record, performance evaluations, and disciplinary matters. Such information shall include but not be limited to all of the circumstances surrounding any termination/cessation of my employment with you or with any other employer. This release shall supersede any agreement I might have with you to not disclose information concerning my employment.

I release and hold harmless you, your officers, and employees, the County of Lassen and its officers and employees from any and all liability and damage, which may result from furnishing the information requested above.

This authorization is a continuing one; if I am hired by Lassen County, it shall remain in effect during the entire period of my employment and may be used by Lassen County at any time it deems appropriate.

I further agree that a copy of this release may be treated as conveying the same authority as the signed original.

Applicant's Name (please print): Loretta J Pearce

Applicant's Signature: 

Date: 02/17/2020

Position Sought: Lassen County Auditor

SUPPLEMENTAL QUESTIONNAIRE - LASSEN COUNTY AUDITOR
(REQUIRED SUBMITTAL BY ALL APPLICANTS)

INSTRUCTIONS: Answer all questions. Attach backup documentation, if applicable.

1. Do you understand that you must be a resident of, and a registered voter in, Lassen County, at the time of appointment?

☒ YES ☐ NO

2. Do you understand that the position you are applying for is an elected position which, when there is a vacancy, the Board of Supervisors is authorized to fill by appointment for the remainder of the elected term; that the successful appointee's ability to hold the position thereafter is dependent on their ability to run for office and be elected?

☒ YES ☐ NO

3. Qualified candidates must meet one of the four "QUALIFICATIONS OF THE OFFICE" to be considered. Please indicate which one or more of the following qualifications of the office that you possess:

☐ I possess a valid certificate issued by the California Board of Accountancy under Chapter 1 (commencing with Section 5000) of Division 3 of the Business and Professions Code showing the person to be, and a permit authorizing the person to practice as, a certified public accountant or as a public accountant.

☐ I possess a baccalaureate degree from an accredited university, college, or other four-year institution, with a major in accounting or its equivalent, as described in subdivision (a) of Section 5081.1 of the Business and Professions Code, and I have served within the last five years in a senior fiscal management position in a county, city, or other public agency, a private firm, or a nonprofit organization, dealing with similar fiscal responsibilities, for a continuous period of not less than three years.

☐ I possess a certificate issued by the Institute of Internal Auditors showing that I am a professional internal auditor, with a minimum of 16 college semester units, or their equivalent, in accounting, auditing, or finance.

☒ I have served as county auditor, chief deputy county auditor, or chief assistant county auditor for a continuous period of not less than three years.

4. If appointed to the position of Auditor, do you acknowledge the following: 1. You must complete at least 40 hours of qualifying continuing education for each two year period. 2. You must complete at least 10 hours each year of the two year period. 3. At least 20 hours of the required 40 hours must be obtained in governmental accounting, auditing, or related subjects.

☒ YES ☐ NO

SUPPLEMENTAL QUESTIONNAIRE - LASSEN COUNTY AUDITOR
(REQUIRED SUBMITTAL BY ALL APPLICANTS)

INSTRUCTIONS: Answer all questions. Attach backup documentation, if applicable.

5. Please describe your experience interpreting, applying, and ensuring compliance with applicable guidelines, laws, rules, and regulations, including the California Government Code pronouncement of the Governmental Accounting Standards Board (GASB), Financial Accounting Standards Board (FASB), and provisions of the Generally Accepted Accounting Principles (GAAP), Statements on Auditing Standard Board (SAS), Government Auditing Standards (GAS), Generally Accepted Auditing Standards (GAAS), California Revenue and Taxation Code, the California Government Code, policies and regulations of the Securities and Exchange Commission (SEC), and the Municipal Securities Rulemaking Board (MSRB). If you need additional space, please attach your answer to this application/questionnaire.
6. Please describe your supervisory experience related to personnel management, staff development, and training. Specify the number of staff and types of positions you supported, the scope of your duties performed (i.e. any experience with hiring, training, performance management, and/or discipline), and how long you held those responsibilities. If you need additional space, please attach your answer to your application.
7. Please describe your experience with preparing and presenting your subject matter expertise to groups and or governing boards and committees (e.g. presentations to the Board of Supervisors, District Board, City Council, etc.). Include details regarding your approach to presenting ideas and recommendations, and the steps you took to ensure a complete and successful presentation. If you need additional space please attach your answer to your application.
8. Do you acknowledge that you must attach a resume, letter of interest, and answers to the supplemental questions to your application in order to be considered for the appointment?

☒ YES ☐ NO

//////////

Supplemental Questionnaire-Lassen County Auditor

5. I have numerous years of experience in interpreting, applying and ensuring compliance with accounting standards. Most of my experience came from my time at Northeastern Rural Health Clinics. During this time, I prepared all of the monthly and annual financial statements. These statements were prepared by GASB standards and met all GAAP provisions. I prepared monthly financial statements as well as year-end financial statements. I worked with the external auditor to ensure that the financial statements were correct. The health clinics were federally funded, therefore, there were multiple required filings to be in compliance with grant requirements. I attended trainings to learn about the requirements as well as GASB continued education classes.

6. My supervisor experience began when I was 14 years old. At this time, I began working at my father's station. I was trained by a CPA on bookkeeping and proper accounting principles. I scheduled work hours, did inventory management, processed payroll and supervised job duties of 5 station attendants. This is what led me to pursue a career in accounting. More current supervisory experience, as reflected on my resume, began when I supervised one accounts payable clerk from 1996-2002 while employed at the Lassen Indian Health Center. My supervisor responsibilities included overseeing the job duties of one employee. I looked over and approved accounts payables, ensured that work was completed correctly and efficiently and provided job training as needed. In 2002, I began working at Northeastern Rural Health Clinics where I worked until 2011. In this position I was the supervisor of three fiscal staff. I oversaw the workload of these three employees, provided training, performed performance reviews, and worked side by side with the HR department during the hiring process and to properly handle any disciplinary actions that arose. During my time there I attended numerous management trainings that also included focuses on supervising.

In 2012, I worked as the interim Chief Financial Officer for Central Oklahoma Family Medical Center. During this time, I was the supervisor of the fiscal staff which consisted of six employees. I worked as a contracted employee however, I flew back to Oklahoma on multiple occasions to provide training to the staff. I ensured that duties were spread out properly between all of the staff members and that proper controls were in place.

Since 2017, I have been employed as the Assistant Auditor of Lassen County which has involved assisting with the supervision of 7 staff members. Overall, I have significant supervisory experience. Over the past 24 years, I have consistently had supervisor duties for 18 years.

7. My experience with preparing and presenting information comes from my employment at Northeastern Rural Health Clinics and my contracted positions at Central Oklahoma

Family Medical Center and Anderson Valley Medical Center. During my Health Care positions I reconciled accounts, created journal entries, balanced, and closed monthly financials. Board members would receive the monthly financial packet which included the actual financial reports and year to dates, bank balances, and outstanding accounts payables and receivables balances by the third week of the following month. This information was broken down in multiple ways to portray the entire financial picture as a whole as well as by different categories. These categories included, payers which consisted of insurance companies, federal grant funding and federal loans. The reports also included remaining drawdown balances for loans and grants. I put together and presented graphs of patient visits, grouped them by providers, insurances, suites, and as a whole. These graphs were complex and detailed all the way down to the cost per patient. At the board meetings, I would go over financial packets with the board members, discuss possible scenarios and answer any questions that were asked. The steps I took to ensure a complete and successful presentation was to prepare and distribute all items in advance so that the board had ample time to look over the information and think about the questions that they had prior to the meetings.

Loretta Pearce

[REDACTED]
Susanville, CA 96130 [REDACTED]
[REDACTED]

February 17, 2020

Lassen County Personnel Department
221 South Roop Street, Suite 3
Susanville, CA 96130

To The Hiring Committie:
Subject: Lassen County Auditor


I would like to formally apply for the Lassen County Auditor position. I have 40 years of highly skilled, professional accounting experience that I feel makes me an exceptional candidate for this position. As you know, I have been employed with the County of Lassen as the Assistant Auditor since March 2017. During this time, I have demonstrated my abilities as an efficient and focused employee as well as my willingness to take on all projects and tasks. I have had the opportunity to learn the policies and procedures of the County and the Auditors office as well as a chance to build a working relationship with the staff and gain a thorough understanding of the business practices and daily operations of the Auditors Office.

In my employment prior to being the Assistant Auditor, I held multiple jobs in a supervisor position. In the past 24 years, I have held a position as a supervisor for 18 years. I have 40 years of accounting experience with duties including; preparing financial statements, budgeting, processing payroll, maintaining accounts receivables, analyzing productivity, budgeting and reporting of state and federal grants, maintaining inventory, reconciling bank statements and general ledgers, performing journal entries, preparing W-2's and 1099's and processing payroll tax returns. I have worked directly with external auditors and am very familiar with the audit process.

Prior to employment at the County of Lassen, while employed at Lassen Community College, I also worked as a contract employee for several FQHC Health Centers. My strong background in auditing, finance and financial statement preparation allowed me to quickly evaluate their situation, determine their needs, and develop a plan to make them more efficient. For example, one clinic ran three different accounting systems which I converted into one accounting software program. I then created excel templates to convert their billing system into a format that imported directly to their accounting software program, saving hours of time previously spent entering journal entries. As a contract employee working primarily off site, it was important to have professional communication skills, the ability to prioritize and work efficiently, as well as the ability to work individually and as a team.

I appreciate your consideration and look forward to further discussing this opportunity with you. Please let me know if I can provide any further information to support my abilities to fulfill this position. I can be reached by phone at [REDACTED] or by email at [REDACTED]

Sincerely,


Loretta Pearce

Loretta Pearce

[REDACTED]
Susanville, CA 96130

[REDACTED]
[REDACTED]

OBJECTIVE: To advance to a higher position that will continue to challenge my skills and abilities.

EDUCATION:

40 years of accounting experience

Excellent knowledge of the following:

- MIP Fund Accounting Software
- MIP Human Resources Software
- Redwing Fund Accounting Software
- Microsoft Excel
- NextGen
- Healthpro
- Microsoft Access
- Quickbooks
- Peachtree
- Datatel
- NeoGov Hiring Program
- Conversion of New Software
- Genled Accounting
- ADS Payroll
- Munis (Tyler) Software

WORK EXPERIENCE:

March 2017-Current

Assistant Auditor-County of Lassen, Susanville, CA

- Supervise and direct workload of audit department staff.
- Assist in external audits.
- Project Manager for Munis(Tyler) Software implementation.
- Coordinate the activities of the department.
- Assist in the hiring, training and evaluation of staff.
- Serve in the absence of the Auditor.
- Coordinate department information technology systems including payroll.
- Coordinates outside auditor.

June 2013-March 2017

Human Resources Technician-Lassen Community College,
Susanville, CA

- Coordinated and participated in the recruitment, hiring and processing of assigned groups of employees and substitute. Coordinated logistics and other hiring activities. Processed background verifications. Prepared notices of employment. Served as EEO on committees.
- Prepared and maintained personnel employee files, recruitment files and employment contracts for faculty and management.
- Applied California Education, Teacher's Retirement Law, federal and state laws to benefits and followed procedures to support compliance
- Answered questions regarding opening and hiring procedures.
- Assisted with applicants submitting applications on NeoGov.
- Enrolled new employees in benefit programs by providing information, helping with forms and explaining benefit packages.
- Processed and entered new employee information into NeoGov.
- Maintained up to date information for Staff in Datatel.
- Reviewed, provided additional documentation and worked with applicant to compile a complete application for minimum qualifications.
- Worked with payroll to ensure accurate payroll on wages, benefits and deductions.
- Reviewed and approved payroll before processing.

March 2011-June 2013

Accountant II-Lassen Community College, Susanville, CA

- Processed payroll for approximately 400 employees
- Reconciled and Filed 941's, DE-9's and W-2's
- Reconciled Accounts Receivable
- Reconciled bank deposits
- Prepared monthly financials
- Performed all financial requirements of bookstore/cafe

August 2002-December 2011

Senior Accountant Northeastern Health Clinics Susanville, CA

- Supervised purchasing, accounts payable, payroll, and accounts receivable
- Handled recruiting and training of finance department
- Implemented/maintained HR software
- Managed leave accrual, benefit eligibility, self funded UI accounts and 403B contributions/distributions.
- Maintained weekly cash-flows spreadsheet
- Reconciled/ Filed 941's, DE-6's, DE-7's, W-2's, & 1099's
- Reconciled GL monthly
- Reconciled/submitted reports/draw downs, for grants
- Developed/maintained financial policies and procedures
- Journal Entries
- Prepared monthly financials
- Maintained 330 Pharmacy inventory and sales
- Assisted in the implementation of NextGen
- Reconciled monthly NextGen reports and entered into MIP
- Prepared job descriptions/qualifications
- Worked closely with auditors on all audits

April 1996-June 2002 **Fiscal Controller/Auditor** Susanville Indian Rancheria/Lassen Indian Health Center Susanville, CA

- Supervised Accounts Payable clerk
- Processed payroll
- Processed monthly Accounts Receivable statements
- Accounts Receivable collections
- Maintained and processed company/employee credit cards
- Maintained government credit cards
- Assisted in budget preparation
- Monitored state and federal grants and contracts
- Controller for Hud project

CONTRACTED CONSULTANT SERVICES:



March 2012-July 2012

Contracted Interim CFO-Central Oklahoma Family Medical Center-Konawa, OK

- Reconciled GL monthly
- Combined billing system with GL
- Reconciled Pharmacy, revenue, inventory, etc
- Trained Employees
- Produced monthly financial/board reports

- | | |
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| November 2011-March 2015 | Consultant Services-Anderson Valley Health Center, Boonville, CA <ul style="list-style-type: none"> • Reconciled a full year of financials for audit purposes • Reconciled A/R from ECW billing system • Analyzed A/R aging • Monthly reconciliations of 9 bank accounts • Prepared month end journal entries • Performed annual audit preparations |
| June 2004-October 2007 | Consultant Services-Coffee Up-Susanville, CA <ul style="list-style-type: none"> • Full Charge Bookkeeper • Processed Payroll • Analyzed Business Sales Reports • Designed/implemented improved performance plan |
| August 2001-May 2004 | Consultant Services-McCourt Construction-Susanville, CA <ul style="list-style-type: none"> • Processed Payroll • Full Charge Bookkeeper |

REFERENCES:

Garrett Taylor	CPA/Former Supervisor	
Lucy Reimche	CPA/Former Auditor	
Bob Gaumont	Former Supervisor	