



## DIRECTOR OF FINANCE

*Population 34,400*

*Express Interest by Friday, August 31st*

### OPPORTUNITY

The Municipality of Norristown is looking for a highly skilled, hands-on, experienced public administrator who is strong in the fundamentals of public finance & personnel management to serve as it's next Director of Finance—someone ***“ready to take the department to the next level”***.

With its' population of 34,400, the Municipality of Norristown, Pennsylvania has all the small city charm with big city benefits. Located near **Historic Valley Forge, the Liberty Bell and Independence Hall**, Norristown boasts a rich heritage and dynamic future making this the place to be.

*where you belong*

### BACKGROUND

Norristown has been a home rule municipality since 1986 when voters adopted a charter with a **Council-Manager** form of government with a seven-member municipal council.

The office of Mayor was abolished in July 2004 after a public referendum amended the municipal charter. Executive & administrative authority is delegated to the Council-appointed **Municipal Manager**. The **Director of Finance** reports to the Municipal Manager

The **Director of Finance** advises the Manager, Council and Department Heads on financial policies and issues affecting Municipal operations and services and provides important technical assistance to department directors and staff of the Municipality.

DIRECTOR OF FINANCE

## HISTORY

The Municipality of Norristown like many municipalities in the Philadelphia metropolitan area, was part of a land grant given to William Penn. The area was first settled by the Dutch, German, Swedish, Welsh, and English and was known in Penn’s time as the “Manor of William Stadt.” The tract which includes present-day Norristown and East Norriton and West Norriton was given to Penn’s son who sold the land to **William Trent** and **Isaac Norris**. Trent founded the city of Trenton. In 1712, Norris became the sole owner of the land.

After Norris’s death, the land passed to heirs who later sold 543 acres to John Bull of Limerick Township. Bull sold most of his land, including Barbadoes Island, to Doctor William Moore Smith for the use of what was to become known as the University of Pennsylvania; the University sold the land to Montgomery County when it was separated from Philadelphia County in 1784 and Norristown became the county seat. The first courthouse was located in what is today the courthouse square.

The University sold the other portion of land to Dr. Smith in 1789. John Markley purchased land from the son of Dr. Smith and in 1801 offered much of it for sale in small lots or farms. As the land developed and population increased, the town became large enough for incorporation. On March 31, 1812, Norristown became the first borough in Montgomery County. The area of the borough at the time of incorporation was about one square mile with a population of about 500. By 1833 the borough had expanded to its present day boundary with a population of over 6,000.

Growing rapidly after the Civil War, Norristown’s population swelled to 22,265 people by 1900 and by 1940 it was home to 38,181 Norristonians, making it the most populous Pennsylvania borough pre-World War II.

## GEOGRAPHY

Norristown is located in southeastern Pennsylvania, 6 miles (10 km) northwest of Philadelphia. Major cities are within short driving distance (in hours):

*Atlantic City (1.5)      New York City (1.5)*  
*Washington D.C. (3)      Pittsburgh (4.5)*

Totalling 3.519 square miles in land area, the municipality sits along the Schuylkill River. It’s two major tributaries, the Stony Creek and the Saw Mill Run, bisect the town in thirds and empty directly into the Schuylkill.

For the outdoors enthusiast, the Annual Dragon Boat races are fun for participants and observers. Thousands of acres of public parks and hundreds of miles of local and regional trails.



Norristown has four distinct neighborhoods: *the West End, the East End, the North End, and the downtown*. Norristown is also bounded by the Townships of East and West Norriton, Plymouth Township, Bridgeport Borough, and Upper Merion.

## DEMOGRAPHICS

Norristown is the seat of Montgomery County, establishing its value as a central place within one of Pennsylvania’s most affluent and rapidly growing counties. Norristown has a population of 34,324 as of the 2010 U.S. Census and is the 4th most populous municipality in Montgomery.

As of the 2010 census, Norristown's population is 34,324, which represents a 9.7% increase since 2000. Norristown’s population’s median age is 32.5 compared to the national average of 36.8 and lower than most communities in the region. An age break down chart is as follows:

Age Bracket	Percentage
1-10	15%
10-20	13%
20-30	19%
30-40	15%
40-50	13%
50-60	11%
60-70	7%
70+	6%

*Source: U.S. Census*

Director of Finance

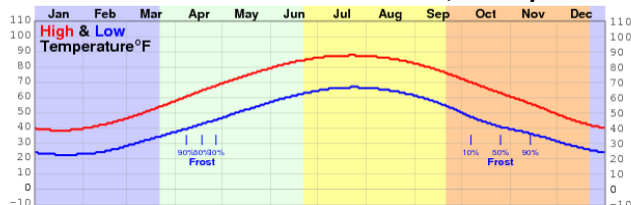
In terms of race and ethnicity, the municipality's population is 41% White, 36% Black / African American, 2.1% Asian and 4.6% claim two or more races. Also, 28.3% of the population had some Hispanic or Latino ancestry.

The median age of all residents is 31.2 years, with an age distribution of 26.2% under the age of 18, 43.5% between ages 18 and 44, 21.2% between ages 45 and 64, and 9.1% ages 65 and above. Median household income in 2010 was \$42,764.

## CLIMATE

Norristown is classified falling within the humid subtropical climate zone. Summers are typically warm and humid, fall and spring are generally mild, and winter is generally cold.

Table II: Climate Data for Norristown, Pennsylvania



## COMMERCE

Norristown's economy is based largely on institutions of government, healthcare, legal & social services sectors. Norristown is home to the corporate headquarters of **USM** and **U.S. Roofing**. **Montgomery County** is the largest employer. Other employers with a considerable presence in Norristown include:

- Pennsylvania Dept. of Environmental Protection (DEP)
- Montgomery County Intermediate Unit
- Norristown Area School District
- USM (formerly U.S. Maintenance)
- U.S. Roofing Corporation

In addition to major employers, there are numerous small professional, manufacturing, technology, and distribution firms operating in the municipality, as well as law offices and local realty companies.

Norristown is home to two distinct business districts: *Main Street & West Marshall*, which is home to diverse businesses that represent nearly a dozen countries. As Norristown enters its third century, there is a renewed interest in urban style living and walkable communities.

Norristown is determined to revitalize its business districts and neighborhoods and has made important efforts to do



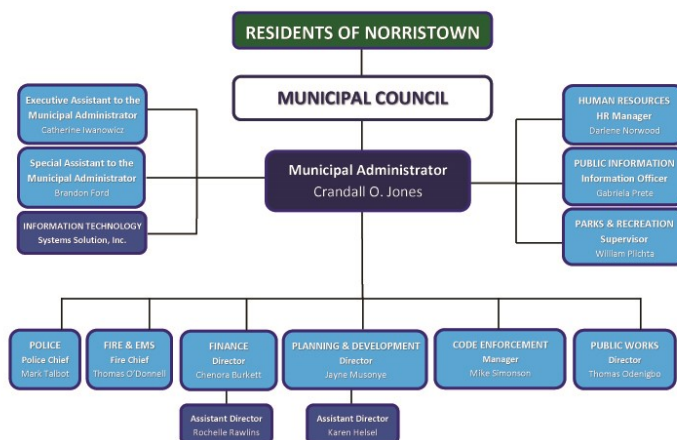
so. But the Municipality has also recognized that future development is at times hampered by its poor image, disproportionately large concentration of the County's low income population and the amount of assessed land that is exempt from real estate taxes.

## FORM of GOVERNMENT

Norristown has been a home rule municipality since 1986 when voters adopted a charter with a **Council-Manager form of government** with a seven-member municipal council. The office of Mayor was abolished in July 2004 after a public referendum amended the municipal charter. Executive and administrative authority is now delegated to a council-appointed Municipal Administrator.

Members of the Municipal Council each represent one of the voting districts in the Municipality. There are four districts and three at large seats. All council members serve four year terms. No council member may be elected for more than two consecutive four-year terms and the balance of one unexpired term of a vacant Council seat. Thereafter, an outgoing Council Member may not be elected or appointed to serve for at least two years.

The Council directs Municipal activities through the appointed Municipal Manager, who supervises all departments. Mr. Crandall Jones has served for the past 4.5 years.



## Director of Finance



## MUNICIPAL SERVICES

Norristown has a \$32 million FY2018 Annual Budget, and an ad valorem tax millage rate on property classification of .0147. The municipality also collects and manages an Enabling Tax inclusive of Business Privilege Tax, Earned Income Tax and a local services tax at a rate of 2.1% shared with the local school district. The business privilege tax rate is .001 or \$1 per \$1,000 of gross revenue after exclusions

The provision of public services and community facilities in Norristown is provided largely by the Municipality with some supplementation by private resources. As such, Norristown is nearly a full service city with more than 160 full-time employees in 8 departments:

***Administration, Building & Code, Finance, Fire Parks & Recreation, Police and Public Works, and Planning & Community Development.***

Norristown is not responsible for water treatment or wastewater treatment.

## WORKING ENVIRONMENT

The new Director of Finance will enjoy collaboration and a supportive environment where unique challenges, innovative solutions and accomplishment will be a part of daily work. Departments are led by highly-qualified, experienced, professional managers who continue to provide valuable leadership to the Municipality.

### ***Administration***

*Responsible for implementing the policies, resolutions, and ordinances adopted by the Municipal Council, preparation and implementation of the Council-approved annual budget and daily management of all municipal staff, departments, and activities.*

### ***Building and Code Enforcement***

*Serves the following functions: Regulating Residential Properties, Building Construction, pre-occupancy Building Inspection, Property Maintenance, Historical and Architectural Review Board, & Shade Tree Commission.*

### ***Fire & Emergency Services***

*Saving lives and protecting property with 9 Chief Officers, the Fire Marshal, 15 career firefighters and 30 volunteer firefighters. The Fire Department has 80 combined career and volunteer firefighters.*

### ***Police***

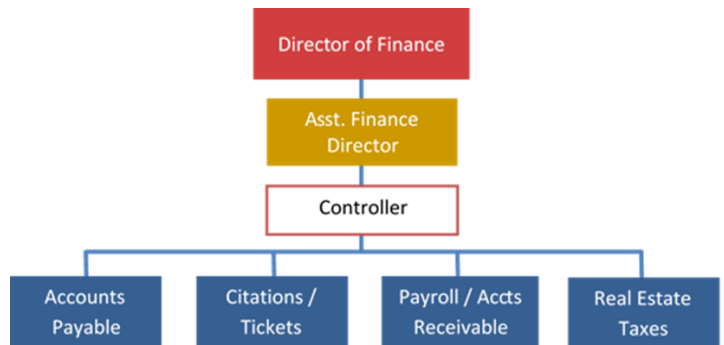
*Protecting life and property to maintain a high quality of life for Norristown's residences. The Department has 48 uniformed officers and 6 full-time detectives.*

### ***Parks and Recreation***

*Norristown offers adult and children's recreation programs for the winter, spring, and fall seasons. The municipality enjoys the benefit of 12 public parks of more than 300 acres.*

### ***Public Works***

*Provides services in: Street Maintenance, Storm Water, Trash Collection / Recycling and Snow Removal—19 employees in 4 divisions managed by 3 Foremen.*



## THE FINANCE DEPARTMENT

The Finance Department conducts all financial transactions related to municipal assets, cash collections and disbursements, employee payroll and benefits according to Generally Accepted Accounting Principals, tax collection, and customer service / collections of parking citations.

Seven (7) finance employees serve in four divisions:

***Accounts Payable, Citations / Parking Tickets, Payroll / Accounts Receivable, Real Estate Taxes.***

The Department is experienced. Average employee longevity is 8.6 years and employee retention of expertise of senior management for continuity of operations is high with the Asst. Finance Director's (22yrs) & Controller's (13yrs).

Director of Finance

## KEY RESPONSIBILITIES of the

### FINANCE DIRECTOR

Responsibilities of the Director of Finance are:

- ◆ Revenue forecasting, revenue collection and compliance, treasury management, investment management, pension administration, debt management, disbursements, reporting and audit activities;
- ◆ Strengthen the organizations financial management, business processes, policies, data management and information technology;
- ◆ Maximize return and limit risk on cash by minimizing cash balances and making investments;
- ◆ Enforcement of the collection of taxes in compliance with the laws of the Commonwealth of Pennsylvania;
- ◆ Develop and maintenance an inventory of capital assets and infrastructure;
- ◆ Protect assets by establishing, monitoring and enforcing internal controls;
- ◆ Develop and administering policies and standard operating procedures necessary to assure safe and effective management of staff and daily operations;
- ◆ Develop and executing annual operating & capital budgets;
- ◆ Maintain department records including assets, maps, plans, personnel, purchasing, and reports;
- ◆ Provide status of financial condition of the Municipality by collecting, interpreting, projecting and reporting key financial data.
- ◆ Ensure compliance with federal, state and local legal requirements by researching existing and new legislation, consulting with outside advisors and filing financial reports.
- ◆ Pension administration for uniform, non-uniform and management workforce.
- ◆ Manage budget & expenditure controls effectively.
- ◆ Hires, trains and appraises staff effectively and takes corrective action as necessary on a timely basis and in accordance with Human Resources .

## RECENT PROGRESS by the FINANCE TEAM

Norristown is a municipality that is looking toward the future, without forgetting its past. For the past 3 1/2 years, the Finance Department has been modernizing its systems, tools and processes. During this period the Director of Finance's efforts have successfully:

- ◇ Brought the municipality current from a 7-year backlog of audits;
- ◇ Refinanced the city's debt— found **\$1 million surplus** which was used to help fund the Fire & Police Pensions;
- ◇ Aiding in the completion of the city's 1st **Capital Improvements Program (CIP) - \$10 Million** over 5 years;
- ◇ Raised the Bond Rating to AA-;

## OPPORTUNITIES & CHALLENGES

The new Director of Finance will be given the opportunity to address these opportunities & challenges:

- ◇ Creating a long-range Financial Plan;
- ◇ Updating Financial Management System / Software;
- ◇ Increasing the municipality's E-government services;
- ◇ Assisting in managing \$3.5 Million in street construction projects over the next 5 years;
- ◇ Assisting in the upgrade to Municipal (City) Hall.;
- ◇ Increasing accounting and financial management capacity of department staff;
- ◇ Examining finance processes (purchasing, payroll, procurement, AR/AP, budgeting, reporting) & more;
- ◇ Examining the City's current services, management of assets, potential for financial growth, & sustainability;
- ◇ Examining the City's current capital investments and use of debt instruments to help the City to make better use of growth markets and debt capacity;
- ◇ Improving financial reporting, accuracy & priority-setting tools, and a well-defined budget process;
- ◇ Modernizing the Finance Department, professional development of department staff, and improved use of technologies;
- ◇ Creation of a long-term Financial Strategic Plan

Director of Finance

## PAST FINANCE DIRECTORS

Past Directors of Finance have served an average of 3.5 years. Current Director of Finance is leaving soon after accepting a job with a national Non-Profit organization.

## THE IDEAL CANDIDATE

The ideal candidate will possess the following skills:

- ◆ Financial management, budget preparation and fiscal accountability;
- ◆ Organizational processes improvement;
- ◆ Planning, organizing, directing and improving department operations, procedures and organizational structure;
- ◆ Training and professional development / training of department staff.

The ideal candidate will possess the following abilities and attributes:

- ◆ Authoritative but responsible & accountable;
- ◆ A hands-on, technical / accounting executive ;
- ◆ Brings best-practices from public & private sectors;
- ◆ Excellent communicator, accepts input from others, and is a decisive decision maker;
- ◆ Fully understands and effectively explains risk;
- ◆ Improves skills performance of other departments;
- ◆ Thrives in an environment of transparency ;
- ◆ Values staff input and the ability to recognize staff contributions, skills & abilities;
- ◆ Possesses a positive, public / customer service attitude;
- ◆ Can effectively tell staff and Council “no” with clear reasons for doing so;

## CERTIFICATIONS & LICENSES

- ◆ Government Finance Officers Assoc. (“GFOA”) desired.
- ◆ Certified Public Accountant (“CPA”) CPA, CMA or CFM.
- ◆ Successful background check; ability to bond.

## EDUCATION

- Bachelors Degree in Accounting, Business Administration, Public Administration, or closely related field. (Masters Degree preferred, but not required).

*Note: Equivalent combination of education, training, and progressively responsible experience in Finance, Business Administration which provides the requisite knowledge, skills, and abilities for the job will be considered*

## EXPERIENCE

- ◆ 5 or more years as Chief Financial Officer for a similarly-sized local government, county, or state agency;

**OR**

*7 or more years as Deputy or Assistant Finance Officer / Director for a local government, county, or state agency larger than Norristown.*

- ◆ Experienced in municipal finance involving Warrants, Investments, TIF Financing, and GASB / GAAP;
- ◆ Understands Debt Service, Capital Investment and Debt Instruments and how to best to use them as growth instruments;
- Proven senior financial management experience for a government agency is highly desired—and will be given first consideration.
- Some private-sector executive financial management experience will be a plus.

## EQUAL OPPORTUNITY

The Municipality of Norristown is an Equal Opportunity Employer. The Municipality values public service, equal opportunity and the importance of diversity in the workplace. It is a community committed to workforce building and serving its residents and businesses with commitment to the following values:

***Responsibility, Respect, Teamwork,  
Honesty and Diversity/Inclusion.***

Veterans, all genders and ethnicities encouraged to apply.

Director of Finance



# AMENITIES

## Norristown

### AMENITIES

Norristown, Pennsylvania, is the bustling center of local government with a lively urban vibe. Norristown reflects a varied cultural and ethnic demographic that give its events, attractions, dining experiences, rich history & wide appeal.

#### 10 things to do in Norristown include:

- Valley Forge National Historic Park
- Elmwood Park Zoo
- Norristown Farm Park
- Greater Norristown Art League
- Norristown Riverfront Park
- Theatre Horizon, Center Theater and Iron Age Theater
- Schuylkill River & Riverfront Park
- Selma Mansion
- Elmwood Park Bandshell
- Zwahlen's generational ice cream and chocolatiers

Architecture and history enthusiasts will enjoy the region's richness of Revolutionary War sites and more than 60 many national historic landmarks including the **Liberty Bell, Independence Hall, and Gettysburg National Battlefield.**

Despite the loss of its historic movie & vaudeville theaters, Norristown is home to two performing arts theaters: **Montgomery County Cultural Center & Theatre Horizon**, and four professional theater companies: **Centre Theatre, Iron Age Theatre, Theatre Horizon, and New Cavern Productions**) - all part of The Theatre Alliance of Greater Philadelphia and **Greater Philadelphia Cultural Alliance.**

These theaters form the nucleus for **Norristown Arts Hill**, a collection of theaters, art galleries, and professional firms on the 300-500 blocks of DeKalb Street in downtown. The city's Main Street contains a wide variety of upscale ethnic restaurants providing Korean / Japanese, Mexican, Italian, Ethiopian and Vietnamese food. For those who like to shop, the **King of Prussia Mall**— the 2nd largest shopping mall in the United States—is a luxury mall sits just minutes from Norristown. Among its 400 stores and restaurants are Bloomingdales, Macy's, Louis Vuitton, Gucci and a Telsa Motors dealership!

Within 20 minutes drive of Norristown are the **Philadelphia Eagles** (NFL), **76ers** (NBA) and **Flyers** (NHL) professional sports franchises . **There is something for everyone here!**

Valley Forge National Historic Park is a 15 minute drive.



Courtesy: Valley Forge Tourism & Convention Board



Elmwood Park Zoo



Director of Finance





## RESIDENCY

Residency within the city limits is not required.

## COMPENSATION

Salary \$110,000—\$120,000 / year (*doq*) w/ competitive benefits:

- ◆ Vacation – 25 days annually
- ◆ Medical (Aetna)– HMO, QPOS & PPO. HMO base plan; employee contributes 12.5% of premium. Buy-up to the QPOS or PPO plan. EE has option to opt-out of coverage.
- ◆ Dental –Delta Dental – 100% employer paid
- ◆ Vision – Vision Benefits of America – 100% employer paid
- ◆ Life & AD&D – 1x annual salary – employer paid; employee has option to purchase additional coverage on self, spouse and dependents
- ◆ Generous Personal and Sick leave

### *Other useful information*

For additional information, visit the following links:

- [Municipality of Norristown](#)
- [Norristown Area School District](#)
- [Montgomery County Government](#)



## APPLICATION & SELECTION PROCESS

Express interest on or before **August 31st**.

Candidates will be screened **early September**.

Semi-Finalist background checks **mid-September**.

Final interviews held end of September / early October .

## APPLY TODAY!!!

Email with **Resume & Letter of Interest** to:

***David Evertsen, Principal***  
[NorristownFinDir@municipalsolutions.org](mailto:NorristownFinDir@municipalsolutions.org)

before **Friday August 31st**

Faxed & mailed resumes will not be considered.

Direct questions to 928-220-2611 or 623 207-1309.

## CONFIDENTIALITY

The Municipality realizes that not every candidate is comfortable having their names disclosed to the public. Accordingly, all candidate application materials, including the applicant’s name, will remain strictly confidential until such time as the candidate authorizes disclosure.

*This recruitment actively managed by:*



**MUNICIPAL SOLUTIONS**®  
EFFICIENCY. TECHNOLOGY. SAFETY.

[www.MunicipalSolutions.org/recruiting](http://www.MunicipalSolutions.org/recruiting)

Director of Finance