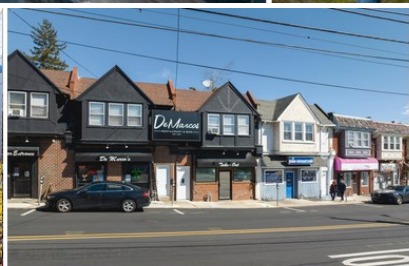




Upper Darby PA



DIRECTOR OF FINANCE (CFO)

Upper Darby (pop. 82,716) is looking for a Director of Finance / CFO with hands-on, administrative / technical experience to manage a wide-range of its financial functions while modernizing financial systems & processes of the 6th largest local government in Pennsylvania!

The Director of Finance / CFO responsible for managing:

- ◆ \$107m in annual revenues, \$459m in assets and liabilities, and
- ◆ \$89 million GF Operating Budget.

The ideal candidate will be:

- ◆ A hands-on, technical / accounting executive;
- ◆ Experienced with municipal finance tools, systems and processes including budgets, warrants, investments, payroll, purchasing, etc.
- ◆ A master in management of financial portfolios, financial systems, debt service, capital investment and debt / growth instruments.
- ◆ Strong with financial software and converting to new software / hardware environments.



The World in One Place

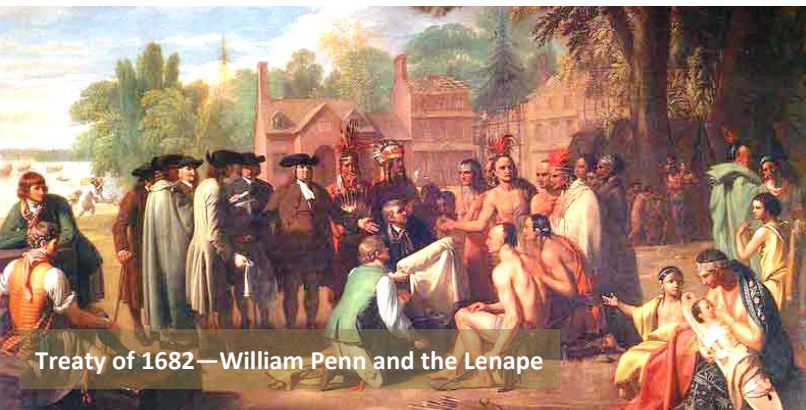
EXPRESS INTEREST BY SEPTEMBER 8TH



HISTORY

The original inhabitants of what is now Pennsylvania included the **Algonquin, Lenape, Delaware, Huron, Iroquois, and Susquehannock**. The **Nanticoke** and **Shawnee** later migrated into Pennsylvania and New Jersey after the first Europeans arrived. In the early 1600s, there were an estimated 5,000-7,000 Susquehannock Native Americans living in the region, but by 1700, that number had dwindled to 300, likely due to diseases brought by Europeans. Although 2020 census reports a Native American population of more than 12,000, there are no federally recognized Native American tribes in Pennsylvania

The **Susquehanna River** or “*Siskëwahane*” (Muddy River) or “*Sisa’we’hak’hanna*” (Oyster River) included widespread oyster beads near the mouth of the river which the Lenape farmed.



Treaty of 1682—William Penn and the Lenape

Pennsylvania / Philadelphia

Although first colonized by the Dutch in 1643, the English took control of the area in 1667, and in 1681, Pennsylvania became an English colony when **William Penn**, a **Quaker** received a royal deed from **King Charles II** of England. Established a colony of religious tolerance, by the mid-1700s, the colony had attracted many German and Scotch-Irish immigrants.

Philadelphia was founded in 1682 by **William Penn** on the confluence of the Delaware and Schuylkill rivers.



The First Continental Congress / Declaration of Independence

Home to **Benjamin Franklin**, the world renowned scientist / inventor / publisher / diplomat, Philadelphia quickly grew into an important colonial city, becoming the site of the **First & Second Continental Congresses**, the signing of the **Declaration of Independence** in 1776, and the seat of the **American Revolution**.

Upper Darby

Founded in 1786, Upper Darby is the 6th largest municipality in Pennsylvania.

In 1974 Upper Darby became a ‘**home rule**’ township in **Delaware County**. Today, more than 85,000 residents (24% foreign-born) call Upper Darby home.

In 2020 the community voted on a motto for Upper Darby, “**The World in One Place**” reflecting the multi-cultural community of the present day.



Row houses in Upper Darby

DEMOGRAPHICS

Population: Most recent census data shows a resident population of 85,681 in 33,548 households. Largest segments of the local population are ages 30-36 (20%) and 20-29 (15%). The Median Age in Upper Darby is 34.6 years.

Heritage: 19% of residents are foreign-born, and 99% are citizens of the USA.

Ethnicity: Upper Darby’s ethnicity is composed of 42% White, 9% Hispanic or Latino, 34% Black or African American, and 12% Asian.

Median Household Income: Based on 2020 data, Upper Darby residents have a median household income of \$62,200. 16% are below the poverty line.

Education Achievement: 12% Graduate, 20% Bachelor, 30% High School, 30% some college, 9% no diploma.

Property Values: The median property value was \$181,600 (2020). 56% ownership.

2022 Population by Age	
Age Group	Percent
< 9	14%
9-19	12%
20-29	15%
30-39	20%
40-49	12%
50-59	11%
60-69	10%
70-79	5%
80+	2%

(source: censusreporter.org)

ABOUT THE TOWNSHIP

Form of Government

Upper Darby has a **Home-rule** charter and utilizes a **Mayor-Council form of government** remaining relatively stable for 50 years.

The **Mayor** is elected *at-large* and serves as the Chief Executive. The **Mayor** is elected to a four-year term, limited to no more than three successive terms. The Mayor is a part-time position. **7 of 11 Township Council Members** are elected from each of the Town’s 7 Districts, plus four (4) elected at-large.

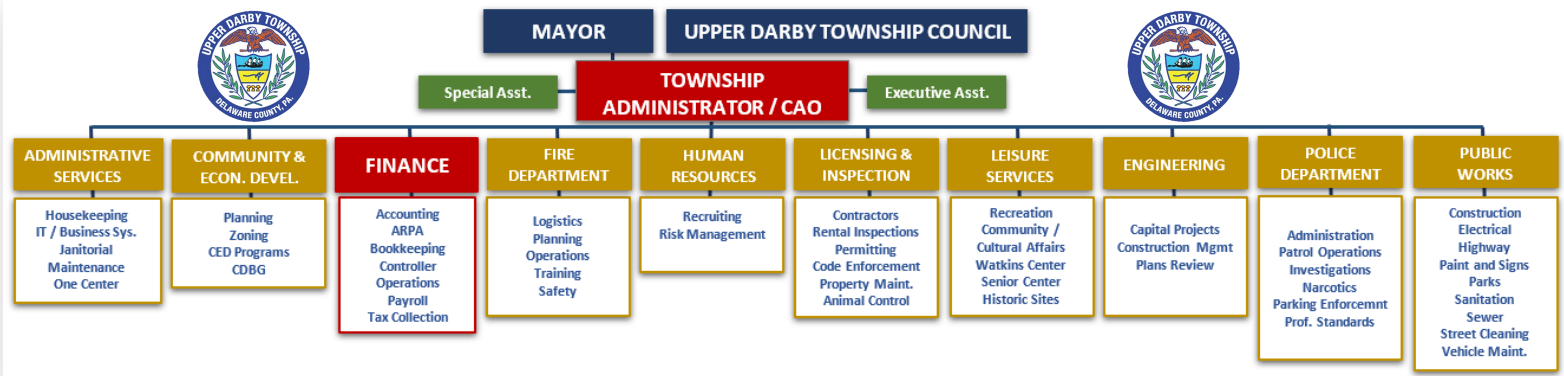
Council Members serve four-year, staggered terms. Council Members in-turn elect a **President, Vice-President, and Secretary**.

Mayor and Council provide vision and policy direction for the Township, enact legislation, set policy, and adopt the annual budget.



The Mayor hires a **Chief Executive Officer (CAO)** to manage daily operations and implement the Mayor and Council’s vision and policies.

[Mayor and Council bios](#) demonstrate a high-level of professionalism, diversity and years of public and private service to the community.



SENIOR MANAGEMENT TEAM

The Chief Administrative Officer (CAO)

The **Chief Administrative Officer (CAO)** is hired by the Mayor to implement policy and laws adopted by the Council, and manage operations directed by the Mayor. He / She is also responsible for the preparation of the annual & capital budgets, management of the Township’s assets, procurement, personnel, and the effective / efficient organization of all City Departments under your authority.

Upper Darby is a ‘full-service’ local government. An experienced Senior Management Team leads over 400 employees in 10 departments, not including the Offices of the Mayor (1 FTE) & CAO (3 FTEs).

Department Heads

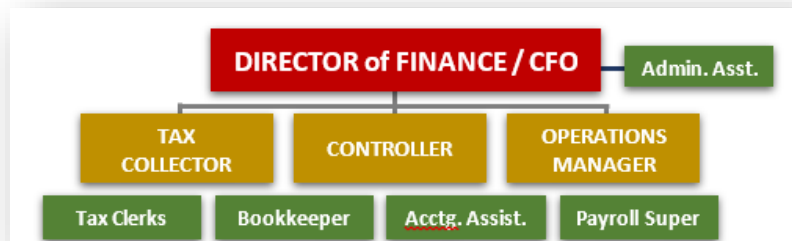
There are The Senior Management Team consists of ten (10) direct report Department Heads with their length of service and number of employees:

- ◆ **Administrative Services:** 2.5 years, 11.5 FTEs
- ◆ **Community & Economic Dev:** 3 years, 5 FTEs
- ◆ **Engineering Department:** new, vacant
- ◆ **Finance:** vacant, 10 FTEs
- ◆ **Fire Department:** 31 years, ret., 63 FTEs, 3 cadets
- ◆ **Human Resources:** 7 months, 4 FTEs
- ◆ **Leisure / Senior Services:** 1.5 years, 9 FTEs, 8 PT
- ◆ **Licenses & Inspections:** 1 month, 9FTEs, 8 PT
- ◆ **Police Department:** 17.5 years, 159 FTEs, 19 PT
- ◆ **Public Works:** 21 years, 136 FTEs, 14 PT

FINANCE DEPARTMENT

About the Finance Department

The **Finance Department** consists of 10 full-time employees who are responsible for *Accounting, Bookkeeping, Controller, Payroll, Operations and Tax Collection.*



The Director of Finance / CFO

The Director of Finance / CFO is responsible for planning and coordinating all Municipal *financial transactions and purchases, financial forecasting and planning, budgeting, reporting, systems development, debt and cash management, internal auditing, investment / grants management, payroll, rev. collection, risk management, and pension administration.*

The Director of Finance / CFO reports to the Township Administrator and is responsible for all areas of financial management for the Upper Darby Township, and is responsible for the management of:

- ◆ \$107m in annual revenues,
- ◆ \$459m in assets and liabilities, and
- ◆ \$89m General Fund Operating Budget.

The Chief Financial Officer (continued):

Essential duties & Responsibilities:

- ◇ *Establishing and maintaining an accounting system designed to accurately reflect the assets, liabilities, receipts and expenditures of the Municipality.*
- ◇ *Collect and prepare financial data needed for the constructions of the annual budget; Prepare the annual budget under the supervision of CAO.*
- ◇ *Supervise and implement all aspects of payroll, accounts payable, accounts receivables, sewer rental, business privilege tax, mercantile tax, occupational privilege tax, amusement tax, pension, debt and cash management, banking, auditing, internal control, budgeting and financial reporting.*
- ◇ *Supervise, train and discipline Finance Department personnel.*
- ◇ *Prepare and approve journal entries, warrant requests, subsidiary entries, and account analysis.*
- ◇ *Oversee all accounting and record-keeping systems; reviews general ledger accounts and computer reports; prepares new accounts.*
- ◇ *Review and approve all purchase requisitions and invoices for payment.*
- ◇ *Supervise collection of all funds due to the Municipality; supervise tax clerk to ensure accuracy of funds collected.*
- ◇ *Attend meetings with council, finance committee; other boards, commissions and professional seminars and conferences.*
- ◇ *Interact with outside auditors.*
- ◇ *Plan and manage a comprehensive investment program of all Municipality funds, provides daily cash flow analysis; comply financial and demographic information of the Municipality's bonds; prepares official prospectus for Municipality bond issues.*

OPPORTUNITIES, CHALLENGES & TOP PRIORITIES

Deferred Maintenance Schedule

The Municipality is in need of a **5-year Capital Improvements Program** which includes all *fixed* and *mobile assets*. The ability to forecast future expenditures and liabilities is a very high priority.

Financial Management System / Plan

The Municipality is in need of updating its financial controls and policies. The municipality does currently not have a formally-established Financial Management System / Plan.

A **5-year Strategic Financial Plan** is needed to inform current and guide future decision-making.

Organizational Development / Software

The Municipality currently uses OpenGov and is currently in the process of updating its HR Information System. Updating the municipality's financial software is critical. Evaluating financial systems, tools, processes policies and procedures needs to be done concurrently.

Professional Development

The Finance Department Staff are dedicated and skilled with a mix of public and private-sector experience. Evaluating staff skills and create a professional development strategy for the department will help to (a) create continuity of financial operations, (b) retaining of quality employees, (c) create greater efficiencies, (d) provide appropriate cross-training, and (e) minimize risk, waste, fraud and abuse.

FINANCIAL DOCUMENTS

[2024 Annual Budget](#)

[2022 Annual Audit](#)

[Other Financial Documents are available here](#)

THE IDEAL CANDIDATE

The current environment provides a tremendous opportunity for the new Director of Finance / CFO to provide value to the municipality,

Desired experience includes:

- A hands-on, technical / accounting executive;
- Experienced in municipal finance involving warrants, investments, TIF financing, and GASB / GAAP;
- A master in management of financial portfolios, financial systems, debt service, capital investment and debt / growth instruments;
- Strong with financial software systems including planning and facilitating the conversion and integration to new software / hardware environments;

Desired skills include:

- Financial management, budget preparation and fiscal accountability;
- Planning, organizing, directing and improving department operations, procedures, structures;
- Training and professional development of staff;
- Excellent communication;

Desired attributes include:

- Authoritative, transparent & accountable;
- Brings public & private sectors best-practices;
- Excellent communicator, accepts input from others, is a decisive decision maker;
- Values staff input and the ability to recognize staff contributions, skills and abilities;
- Possess a positive, customer service attitude;
- Embodies efficiency and effectiveness and teaches department staff by example;
- Thrives in an environment of teamwork and transparency environment;
- Fully understands and effectively explains risk;
- Possesses the ability to direct the conversion to new hardware and software platforms;



Upper Darby

A Home Rule Community
Established 1736

QUALIFICATIONS

Experience

- Ten (10) or more years of** progressively responsible experience in financial management in the public sector. **At least four (4) years** in a Senior Management role.
- Local / State government financial management experience highly preferred.

Education

- Bachelor's Degree** in Finance, Accounting, or closely-related field (*required*). *Master's Degree is preferred.*
- Equivalent combination of education, training and experience will also be considered.

Certifications & Licenses

- Gov't Finance Officers Association (GFOA)
- Certified Public Accountant CPA, CMA and / or CFM.
- Successful background check; ability to bond.

COMPENSATION

Upper Darby offers a **competitive salary of \$140,000 to \$160,000** (DOQ). Performance incentives, relocation expenses, professional dues, retirement and [attractive benefits program](#) include:

- » Medical, Dental, Vision
- » Retirement & Deferred Compensation
- » Life Insurance (Term, Supplemental, Dependent), Paid time off (10 holidays), more!

Total compensation expected to exceed \$200,000.

PAST DIRECTORS

2 Directors of Finance in 33 years. Most recent for 2 years. No Finance Director past 2 years.

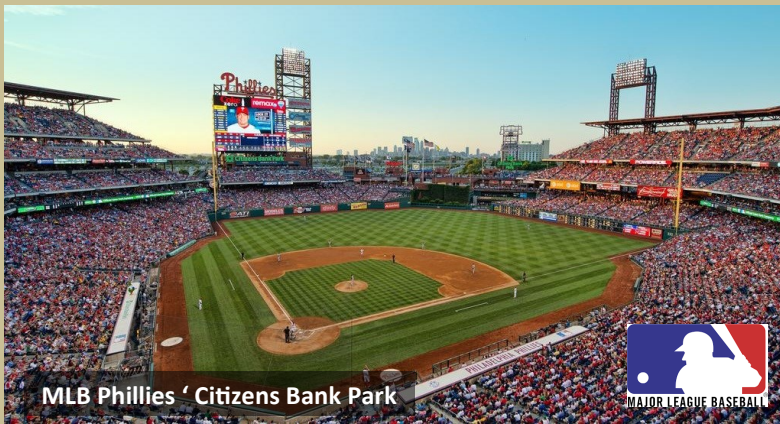
REGIONAL AMENITIES



Upper Darby's International Festival

Valley Forge
 Philadelphia Museum of Art
 Museum of the American Revolution
 Betsy Ross Home // The Franklin Institute
 Constitutional Walking Tour of Philadelphia
 Independence National Historic Park and Liberty Bell Center

Rocky Statue /Steps
 International Festival (Upper Darby)
 Reading (Railroad) Terminal Market
 Sellers Memorial Free Public Library
 Weitzman National Museum of American Jewish History



MLB Phillies ' Citizens Bank Park



NFL Philadelphia Eagles



NBA Philadelphia 76'ers



NHL Philadelphia Flyers

LOCAL AMENITIES



Valley Forge National Battlefield

Upper Darby is at the perfect location for social, cultural, civic recreation and interaction. Activities, parks, amenities, community services, and sites of significant historical interest:

- ◆ Annual Signature Events / Festivals - the annual International Festival celebrates UD's diverse groups .
- ◆ Historic Sites: Within minutes, you can reach the *Lower Swedish Cabin, Valley Forge & Gettysburg National Battlefields*, the *Liberty Bell* and *Independence Hall* - birthplace of the United States.
- ◆ Professional Sports enthusiasts have a lot to choose from: **NBA, NFL, MLB, and NHL** franchises are all here!
- ◆ Trails, Libraries, Parks & Playgrounds - local facilities are used to capacity: 1 Gym, 3 libraries, 34 local parks and playgrounds, two (2) beautiful Naylor's Run Trail (1.6 mi) or Darby Creek Trail (3 mi) .

Philly Cheesesteak



Liberty Bell & Independence Hall



Darby Creek Trail



Upper Swedish Cabin



Reading Market



Old Sellers Library



"The World in One Place"



Historic Valley Forge

DIRECTOR OF FINANCE / CFO

Residency within the municipality not required.

Equal Opportunity

Upper Darby Township values diversity and equal opportunity in the workplace. Veterans, all ethnicities, genders, and persons with disabilities who meet the qualifications are encouraged to apply.

Confidentiality

Expressions of Interest may be confidential before the selection of Finalists is completed. Finalist names may be shared with the media, and may become public information.

This recruitment actively managed by:



MUNICIPAL SOLUTIONS[®]
EFFICIENCY. TECHNOLOGY. SAFETY.

APPLY TODAY!

Email Resume and Letter of Interest to:

CFO-UpperDarbyPA@municipalsolutions.org

Before Sunday, September 8th

Direct Questions to (888) 545-7333.



The World in One Place

EXPRESS INTEREST BY SEPTEMBER 8TH