

BAL HARBOUR

- V I L L A G E -

OFFICE OF THE VILLAGE MANAGER

LETTER TO COUNCIL

NO. 056-2019

To: Mayor Gabriel Groisman and Members of the Village Council
From: Jorge M. Gonzalez, Village Manager
Date: March 29, 2019
Subject: **Appointment of Chief Financial Officer (CFO)**

This Letter to Council (LTC) is to inform you of the recent appointment of Ms. Claudia Dixon to the position of Chief Financial Officer (CFO) for Bal Harbour Village effective April 1, 2019.

Ms. Claudia Dixon is an experienced financial executive with a track record of providing an entrepreneurial spirit to organizations in a variety of sectors. Most recently, she has worked for the City of Miramar in Broward County as their Internal Auditor and previously as the Director of Finance since 2016. In these roles, she was responsible for establishing and leading the city's internal audit function and the oversight of the day-to-day operations of the Finance Department including serving as the treasurer, financial reporting, utility billing, payroll, accounts payable, business tax and grant management areas.

Prior to joining the City of Miramar, Ms. Dixon worked for the University of Miami as the Assistant Controller from 2008 to 2016. In this role, she was responsible for the day-to-day operations of the financial reporting and general accounting areas as well as oversight of the annual audits for the university. Ms. Dixon has also worked for several private auditors, including as an Audit Senior Manager for Ernest & Young, an Audit Supervisor for Rachlin, Cohen & Holtz LLP, and as a Senior Auditor for Watson Rice LLP.

Ms. Dixon has a Bachelor of Accounting from the University of South Florida and is also a Certified Public Accountant from the State of Florida. She is a member of the American Institute of Certified Public Accountants and of the Florida Institute of Certified Public Accountants.

Attached is a copy of Ms. Dixon's resume.

Please join me in welcoming Ms. Dixon to Bal Harbour Village. If you have any questions or need any additional information, please feel free to let me know.

JMG/RI/MH

CLAUDIA DIXON, CPA
10749 NW 11TH STREET
PEMBROKE PINES, FLORIDA 33026
(954) 558-2412
OPHLIN@HOTMAIL.COM

PROFESSIONAL SUMMARY

Experienced financial executive with a track record of providing an entrepreneurial spirit to organizations in a variety of sectors. Resourceful problem-solver with keen analytical skills. Demonstrated ability to add value through continuous improvement initiatives involving efficiency and effectiveness. Professional leader, developer and motivator of people with strong communication skills at all levels within the organization. Leader of strategic initiatives that led to successful results.

PROFESSIONAL EXPERIENCE

City of Miramar

Miramar, Florida

11/18 – Present

Internal Auditor

- Charged with establishing and leading the City's Internal Audit Function. Responsibility includes developing the governing documents (i.e., Charter, Policies, and audit programs); performing risk assessment and creating an annual audit plan.
- Reporting on a regular basis on the progress of implementation, and assisting these components in establishing methods to improve efficiency and quality of services, and to reduce the vulnerability to fraud, abuse and waste.

08/16 – 11/18

Finance Director

- Reported directly to the Chief Financial Officer, position required broad exposure to City leadership.
- Responsibility included oversight of the day to day operations of the Finance Department (including Treasurer, Financial Reporting, Utility Billing, Payroll, Accounts Payable, Business Tax, Grants Management divisions) through the direct supervision of 3 reports and of 40 professional and administrative staff.
- Provided financial expertise as member of various leadership teams formed to facilitate significant business transactions (i.e., Union negotiations, Pension modifications, Capital Improvement Planning etc.).
- Oversight of the \$150 million Cash and investments portfolio.
- Monitored budget allocations, expenditures, fund balances and related financial activities for the purpose of ensuring the allocations are accurate, revenues are recorded, expenses are within budget limits and/or fiscal practices are allowed.
- Implemented and monitored financial and operations policies for effective compliance in business and responsible for institutionalizing financial controls for effective cash flow management.
- Refinanced debt to save over \$6 million in interest expense
- Investigated and analyzed opportunities for increased income through the use of investment vehicles.
- Managed the financial section of the City of Miramar Emergency Management Team, which included enhancing policies and procedures to optimize FEMA reimbursement requests.
- Established policies and procedures for recording and reporting which resulted in improved availability of financial statements and data through the year and audit process

University of Miami

Miami, Florida

12/08 – 8/16

Assistant Controller

- Reported directly to the Associate VP and Controller, position required broad exposure to University leadership.

- Responsibility included the day-to-day operations of the Financial Reporting, General Accounting (including Accounting Systems Training and Document Management), and Property Accounting departments. Responsibility included the direct supervision of 3 direct reports and of 33 professional and administrative staff.
- Oversight of annual audits, which included supervising collaboration among external auditors and central administrative reporting units/departments (i.e., Treasurer's Office, Budget Office, Medical School Finance Department, Hospitals, Clinics, Benefits Office for various retirement plans, etc.) to review accounting changes; identified/addressed accounting issues and assessed/standardized management interpretations for their separately issued financial statements and reports.
- Provided financial expertise as member of various teams formed to facilitate significant business transactions (i.e., sales of assets, business line, etc.).
- Facilitated the work of other departments by resolving complex issues having little or no precedent.
- Chaired the Accounting Council team for the Financial System Implementation.
- Accomplishments included: establishing policies and procedures for recording and reporting which resulted in improved availability of financial statements through the year-end close and audit process; and the implementation of new software for Financial Reporting and tax reporting.
- Formerly responsible for the following functions that were transitioned to other departments/sub-departments:
 - Worked closely with tax advisors and various agencies to identify and resolve issues, including assisting with responses to various agency audits/inquiries (i.e., IRS, State of Florida, etc.).
 - Planned, guided, directed and worked closely with the Benefits Office and external auditors in the successful issuance of government-required pension plans' financial statements until FY 2013.
 - Acted as liaison with the International Studies Department regarding international financial transactions (i.e., study abroad programs, etc.)
 - Oversaw preparation of the University's various tax returns including: 990s, 990Ts, 5500s prior to the creation of a tax department.
 - Coordinated the annual A-133 audit of federal and state grants and contracts until FY 2012.

Ernst & Young
1/05 – 11/08

Audit Senior Manager

Fort Lauderdale, Florida

As an audit senior manager supervised, planned and executed audit engagements. Supervised up to 12 audit teams primarily for three audit clients.

As the primary client contact for assigned engagements at Ernst & Young LLP:

- Responsible for development and management of client relationships, co-development of risk assessments and audit plans, supervision of engagement teams and engagement management, including the preparation of fee quotes and the development and monitoring of time budgets.
- Researched and resolved complex accounting and reporting issues.
- Prepared and presented audit plans, audit findings, business improvement ideas and accounting and industry developments to senior management, audit committees and boards of directors.
- Coordinated with internal audit departments.

Practice management responsibilities included training of professional staff, evaluation and counseling of assigned staff, and identification and interviewing of potential employees. In addition, involved in annual firm budgeting and charged hour forecasting, revenue planning and resource management processes. Led and participated in practice development activities such as proposals and fee negotiations.

Organized and facilitated internal and external activities for the National Association of Black Accountants 2006 National Convention.

Experienced public speaker, including presentations at internal and external training seminars.

Rachlin Cohen & Holtz LLP

Miami, Florida

10/00 – 1/05

Audit Supervisor

Managed day-to-day engagement duties as an audit supervisor , including.

- Planned engagements and supervised engagement team.
- The preparation and review of financial statements and required disclosures.
- Accomplished audits efficiently for executive review.
- Identified key internal controls to determine the nature, extent, and timing of audit procedures.
- Documented internal controls, identified weaknesses, and communicated weaknesses and areas for improvement to management via management recommendation letters.
- Researched proper treatment of accounting issues.
- Applied analytical procedures to assess client operations.

Practice responsibilities included training staff members, conducting in-house peer reviews, assisting expert witnesses in preparation for depositions and trials for various types of litigation cases, coordinating and presenting continuing professional education seminars.

Watson Rice LLP
6/97*–10/00

Audit Senior

Miami, Florida

Reported to firm management in connection with various audit and management advisory engagements, including:

- Provided leadership and supervision to staff auditors during audit engagements.
- Prepared annual financial statements including all footnote disclosures.
- Performed testing of clients' systems of internal controls and evaluation of major accounting functions.
- Prepared management letter comments to be communicated to the clients' audit committee or top management for process improvement and implementation guidance and support.
- Conducted in-house continued professional educational lectures for staff development.
- Implemented firm paperless workpaper environment.

(*) – includes internship period.

EDUCATION AND LICENSURE

University of SouthFlorida

Tampa, Florida

- Bachelor of Accounting, 1999

Certified Public Accountant, State of Florida

PROFESSIONAL AFFILIATIONS

American Institute of Certified Public Accountants, Member

Florida Institute of Certified Public Accountants:

- Member
- 1040K Race – Committee Member, 2009

The Institute of Internal Auditors, Member

Government Finance Officers Association, Member

University of Miami – Workday Finance Implementation Accounting and Advisory Chair, 2015-2016

Controller's Peer Group, Member, 2008 – 2016

National Association of College and University Business Officers, Member

University of Miami – Finance & Treasury Strategic Planning Committee, Member, 2013

University of Miami United Way – Finance & Treasury Ambassador, 2013-2014

Ernst & Young –SouthEast Area - Diversity Committee Member, 2007- 2008

National Association of Black Accountants- Southern Region

- Student Affairs Director, 2006-2008
- Student Convention Committee Member, 2006-2007

National Association of Black Accountants - South Florida Chapter

- Advisor, 2006-2009
- President, 2005-2006
- National Convention Committee Member, 2005
- Executive Vice President, 2004
- Continuing Professional Education Presenter – 2004 National Convention
- Professional Development Director, 2003

Miss Jamaica-Florida Pageant, Inc – Auditor, 2005-2015

Midnight Golf Program, Inc. – South Florida Chapter, Board Member, 2009-2010