



# HUMAN RESOURCES DEPARTMENT

## City of Burlington

179 So. Winooski, Burlington, VT 05401

Voice (802) 865-7145  
Fax (802) 864-1777

## MEMO

TO: Board of Finance

FROM: Stephanie Hanker, Human Resources Generalist  
Susan Leonard, Human Resources Director

DATE: June 07, 2012

RE: Recommendation – Step placement for Marie Friedman, Senior Accountant

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I recommend that Marie Friedman, incumbent for the position of Senior Accountant in the Clerk Treasurer's office, is placed at step 7 of Grade 18 (Step 1 - \$48771.53, Step 7 - \$54392.64 annually) in the Willis Classification System pursuant to Section 5.4 Compensation Plan, subsection A. Placement, of the City of Burlington Comprehensive Personnel Policy Manual. The minimum qualification for the Senior Accountant position requires 3 years of experience as well as a Bachelors degree. Mrs. Friedman possesses a total of 23 years of direct experience in the accounting field, 20 years specifically for the City of Burlington, and a Bachelor's degree. We believe Mrs. Friedman is an excellent candidate for this position and this City will benefit from the many years of direct experience Mrs. Friedman will bring.

Thank you for your consideration.

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**The City is also committed to providing proper access to services, facilities, and employment opportunities.  
For accessibility information or alternative formats, please contact Human Resources Department at 865-7145.**



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### City of Burlington Job Description

Position Title: Senior Accountant

Department: Clerk Treasurer

Reports to: Chief Accountant

Pay Grade: **18**

Job Code: **325**

Exempt/Non-Exempt: Exempt

Union: N/A

General Purpose:

**Provides senior level accounting services, including supervision, in support of the City's central accounting function. Position may also provide accounting services to several other major City Departments, including Burlington International Airport and Burlington Telecom.**

Essential Job Functions:

- Performs and/or supervises accounting duties such as the preparation of journal entries, bank statement reconciliation, general ledger account reconciliation and billing, including but not limited to, payroll, accounts payable, revenue collection, work order accounting and fixed asset accounting.
- Supervises, evaluates and trains appropriate fiscal and clerical staff necessary to carry out the above duties.
- Assists in the preparation of the City's budget.
- Assists in the development and maintenance of appropriate accounting standards and procedures in accordance with Generally Accepted Accounting Principles (GAAP) and other regulatory guidelines and requirements.
- Assists with audits including, but not limited to, the reconciliation of assigned general ledger accounts producing schedules and documentation as well as responding to auditor inquiries.
- Performs and/or oversees the development and reporting of the City's cost allocation plan and capital assets as well as assists with rate design studies and maintains equipment inventory systems.
- Prepares reports, including but not limited to, Capital Improvements, reconciliations, and periodic budget reports.
- Assists in the processing, checking and posting of transactions associated with the City's fiscal and accounting functions.

Non-Essential Job Functions:

- Performs related work as may be required.

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### Qualifications/Basic Job Requirements:

- Bachelor's Degree in Accounting, Business Administration, or related field and three years of relevant experience in accounting; or An Associate Degree or equivalent state testing in accounting and five years of relevant accounting experience; or an equivalent combination of education and experience.
- Minimum of two years supervisory experience preferred.
- Thorough knowledge of general accounting principles and practices required.
- Working knowledge of computerized accounting systems including the ability to operate spreadsheets, word-processing, and database software in a Windows based environment.
- Knowledge of applicable State and Federal guidelines for telecommunication, Federal Airport Grants, and applicable payroll/income tax rules preferred
- Ability to delegate, direct and review the work of subordinate staff and the ability to train associates in accounting practices and procedures.
- Must be consistent and accurate.
- Ability to work well under pressure and appropriately deal with stress.
- Ability to communicate effectively both orally and in writing with City management and departmental staff.
- Ability to establish and maintain good relations with co-workers.
- Ability to meet schedules and deadlines while working with minimal supervision.

### Physical & Mental/Reasoning Requirements: Work Environment:

**These are the physical and mental/reasoning requirements of the position as it is typically performed. Inability to meet one or more of these physical or mental/reasoning requirements will not automatically disqualify a candidate or employee from the position. Upon request for a reasonable accommodation, the City may be able to adjust or excuse one or more of these requirements, depending on the requirement, the essential function to which it relates, and the proposed accommodation.**

- |  |  |   |
|--|--|---|
| <input checked="" type="checkbox"/> seeing                       | <input checked="" type="checkbox"/> ability to move distances            | <input checked="" type="checkbox"/> lifting (specify)     |
| <input type="checkbox"/> color perception<br>(red, green, amber) | within and between<br>warehouses/offices                                 | 30 pounds   |
| <input checked="" type="checkbox"/> hearing/listening            | <input type="checkbox"/> climbing  | <input checked="" type="checkbox"/> carrying (specify)    |
| <input type="checkbox"/> clear speech                            | <input type="checkbox"/> ability to mount and<br>dismount forklift/truck | 30 pounds   |
| <input checked="" type="checkbox"/> touching                     | <input type="checkbox"/> pushing/pulling                                 | <input type="checkbox"/> driving (local/over<br>the road) |
| <input checked="" type="checkbox"/> dexterity                    |  |   |
| <input checked="" type="checkbox"/> hand                         |  |   |
| <input checked="" type="checkbox"/> finger                       |  |   |

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- |   |   |  |
|---|---|--|
| <input type="checkbox"/> reading - basic                    | <input type="checkbox"/> math skills - basic              | <input checked="" type="checkbox"/> analysis/comprehension   |
| <input checked="" type="checkbox"/> reading - complex       | <input checked="" type="checkbox"/> math skills - complex | <input checked="" type="checkbox"/> judgment/decision making |
| <input type="checkbox"/> writing - basic                    | <input type="checkbox"/> clerical                         |  |
| <input checked="" type="checkbox"/> writing - complex       |   |  |
| <input type="checkbox"/> shift work                         | <input type="checkbox"/> outside                          | <input type="checkbox"/> pressurized equipment               |
| <input checked="" type="checkbox"/> works alone             | <input type="checkbox"/> extreme heat                     | <input type="checkbox"/> moving objects                      |
| <input checked="" type="checkbox"/> works with others       | <input type="checkbox"/> extreme cold                     | <input type="checkbox"/> high places                         |
| <input checked="" type="checkbox"/> verbal contact w/others | <input type="checkbox"/> noise                            | <input type="checkbox"/> fumes/odors                         |
| <input checked="" type="checkbox"/> face-to-face contact    | <input type="checkbox"/> mechanical equipment             | <input type="checkbox"/> hazardous materials                 |
| <input checked="" type="checkbox"/> inside                  | <input type="checkbox"/> electrical equipment             | <input type="checkbox"/> dirt/dust                           |

Supervision:

Directly Supervises: 2-6 Indirectly Supervises: 1-3

Disclaimer:

The above statements are intended to describe the general nature and level of work being performed by employees to this classification. They are not intended to be construed as an exhaustive list of all responsibilities, duties and/or skills required of all personnel so classified.

Approvals:

Department Head: \_\_\_\_\_ Date: \_\_\_\_\_

Human Resources: \_\_\_\_\_ Date: \_\_\_\_\_

(Revised February 2011)

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**OFFICE OF THE CLERK/TREASURER**  
**City of Burlington**

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City Hall, Room 20, 149 Church Street, Burlington, VT 05401

Voice (802) 865-7000  
Fax (802) 865-7014  
TTY (802) 865-7142

**TO: Human Resources**

**FROM: Rich Goodwin/Ann Barton**

**DATE: June 7, 2012**

**RE: Step placement for Marie Friedman**

Please review the forwarded resume of Marie Friedman for step placement as allowed under the City of Burlington's Personnel Policy.

Marie was hired as a Senior Accountant on May 14, 2012. Marie has many years of accounting experience, as well as, being a Certified Public Accountant. With her qualifications, we would like to offer Marie the maximum number of steps allowable under the Personnel Policy.  
Thank you.

**MARIE J FRIEDMAN, CPA**  
26 Tyler Drive  
Essex Junction, VT 05452  
802-338-0227  
marie\_friedman@yahoo.com

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## SUMMARY

Government Accounting and Management Professional with over twenty years experience. Successful record of financial statement preparation. Thorough understanding of all general ledger accounting functions: grant accounting, payroll, accounts payable, accounts receivable and fixed assets. Successful record of personnel management, forming and leading teams across the organization, replacing and upgrading accounting systems software. Delivery at all stages of the business process, from staff recruiting through project completion. Have Certified Public Accounting (CPA) License. Areas of expertise include:

- Advanced knowledge of GAAP, GASB, A-133 and other fund accounting guidance
- Financial analysis
- Accounting Policies & Procedures
- Financial Statement Preparation
- Mentoring
- Upgrade financial and payroll computer software
- City financial audit, Single audit, various external audits and Federal compliance audits
- Continued Professional development
- RFP & Procurement experience

## CAREER HISTORY

### City of Burlington, Vermont

**Burlington, Vermont**

#### Accounting Consultant

**1997 – 2012**

Provide a high level of complex financial accounting services to Chief Administrative Officer, Assistant CAO and Chief Accountant.

- Responsible for single audit planning, preparation, completion and Schedule of Federal Expenditures. This also includes monitoring departmental compliance with grant covenants.
- Implement new Pentamation financial software systems. Managed implementation of Payroll software systems, including consolidating multiple payroll processing stations into one team.
- Key player in City-wide audit from audit planning to financial statements.
- Managed financial component of complex Tax Increment Financing audit which covered a scope of sixteen years of projects.
- Delivered Special Projects as required, such as grant audits, external audit and inquires from other governmental agencies.
- Improved Grant management resulting in reduced Single Audit findings.
- Manage City's responsibility with Bond Compliance issues, including required reporting and annual filings.
- Creation and preparation of monthly Enterprise Fund Income Statement, Balance Sheet and Statement of Cash Flow which gives management valuable up to date information on operations.
- Developed Pension plan reconciliation process which resulted in elimination of Net Pension Obligation deficits.
- Developed Retirement and Debt Service tax rate methodology which resulted in more accurate tax rate setting.
- Mentor and train accounting staff to improve accuracy and understanding of their assignments.

#### Assistant Treasurer

**1993– 1997**

Responsible for managing financial, accounting, personnel and administrative activities of the Treasurer's office.

Responsibilities included coordinating all City accounting functions, central payroll, investments and administration of the City's budget program.

- Lead teams to develop and establish central computer policies, procedures and recommendations. Oversaw several computer needs studies.

- Train associates in accounting or fiscal practices and procedures.
- Delegate, direct and review the work of staff.
- Provide technical accounting support to all City departments, Mayor, Board of Finance and City Council
- Meet schedules and deadlines in a fast paced office

**Urbach, Kahn & Werlin, PC , Vermont**

**Burlington, Vermont**

**Senior Audit Staff**

**1989 – 1993**

Provide audit and accounting services to a variety of clients, including many government engagements. Tax preparation and pension plan administration. Audits performed in accordance with Government Auditing Standards issued by the Comptroller General of the United States, including:

- Audits of governmental entities.
- Single audits of governmental and not-for-profit Federal grant and loan recipients.
- Federal contract audits.
- Audits of pension plans
- Audits of manufacturing entities.

**Education**

BS in Business Administration, major in Accounting, University of Vermont, Burlington, VT, 1989

**Community Achievements and Leadership**

- Certified Public Accountant since 1991
- Member of Vermont Society of Certified Public Accountants
- Member of American Institute of Certified Public Accountants
- Served as Treasurer of two non-profit community groups.
- Awarded Young Careerist from the Burlington Business and Professional Women's Association