



**Contra
Costa
County**

For Office Use Only
 Date Received:

EMAIL TO:
 Contra Costa County
 Human Resources Department
jobs@hrd.cccounty.us

PLEASE TYPE OR PRINT IN INK

AUDITOR - CONTROLLER EMPLOYMENT APPLICATION

1. Name:	Schmidt (Last Name)	Donna (First Name)	Moore (Middle Name)
2. Address:			
3. Phones:			
4. Email Addr			

5. **EDUCATION:** Check the appropriate box if you possess one of the following:

High School Diploma G.E.D. Certificate California High School Proficiency Certificate

College or other advanced education/training

Give Highest Grade or Educational Level Achieved: BS in Accounting

Names of colleges / universities attended	Course of Study / Major	Degree Awarded	Degree Type
A) Golden Gate University	Accounting	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>	Bachelor
B)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
C)		Yes <input type="checkbox"/> No <input type="checkbox"/>	
D) Other schools / training completed:	Course Studied	Hours Completed	Certificate Awarded: Yes <input type="checkbox"/> No <input type="checkbox"/>

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve as the County Auditor-Controller. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) From <u>02/2024</u> To <u>12/2024</u></p> <p>Total: <u>0</u> Yrs. <u>8</u> Mos.</p> <p>Hrs. per week <u>40</u> . Volunteer <input type="checkbox"/></p>	<p>Title Consultant</p> <p>Employer's Name and Address College of Marin, 1800 Ygnacic</p>	<p>Duties Performed Responsible for analyzing Ora</p>
<p>B) Dates (Month, Day, Year) From <u>05/2022</u> To <u>02/2024</u></p> <p>Total: <u>1</u> Yrs. <u>9</u> Mos.</p> <p>Hrs. per week <u>50</u> . Volunteer <input type="checkbox"/></p>	<p>Title Business Manager/Controller</p> <p>Employer's Name and Address Liftech Consulting Inc. 344 20th</p>	<p>Duties Performed Responsibilities include but are not limited to</p>
<p>C) Dates (Month, Day, Year) From <u>02/2016</u> To <u>04/2022</u></p> <p>Total: <u>6</u> Yrs. <u>1</u> Mos.</p> <p>Hrs. per week <u>65</u> . Volunteer <input type="checkbox"/></p>	<p>Title Director of Finance</p> <p>Employer's Name and Address Celerity Consulting Group, Inc.</p>	<p>Duties Performed Accounting & Finance: • Supervising</p>
<p>D) Dates (Month, Day, Year) From <u>02/2014</u> To <u>03/2016</u></p> <p>Total: <u>2</u> Yrs. <u>1</u> Mos.</p> <p>Hrs. per week <u>65</u> . Volunteer <input type="checkbox"/></p>	<p>Title Director of Finance & Human Resources</p> <p>Employer's Name and Address 26 7th Street, San Francisco, CA</p>	<p>Duties Performed Fiscal and Administrative Management</p>

7. Do you have any financial relationships with the County such as grants, contracts, or other economic relations?

No Yes

If Yes, please identify the nature of the relationship: n/a

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publicly accessible. I understand and agree that any misstatements / omissions of material fact may cause forfeiture of my rights to appointment as the Auditor-Controller.

Sign Name: Donna Schmidt Date: 03/17/2025

Important Information

1. Your application and any attachments you provide are public documents and are subject to the California Public Records Act (CA Gov. Code §6250-6270), and will be posted online.
2. The completed application and supplemental questionnaire must be received by 11:59 PM on Friday, March 14, 2025 by email to jobs@hrd.cccounty.us.
3. Applicants must complete the Supplemental Questionnaire (below). Attach pages for Supplemental Questionnaire. A resume or other relevant information may be submitted with this application.
4. Applicants may be required to complete a Statement of Economic Interests (California Fair Political Practices Commission Form 700) and authorize the County to conduct a background check, including but not limited to a social media/internet check, credit check and Live Scan fingerprinting.

Supplemental Questionnaire

1. Are you a United States Citizen?
2. Are you registered to vote in the State of California?
3. Are you a resident of Contra Costa County?
4. Describe specific public service or private sector positions you have held which you believe best qualify you for the position of Auditor-Controller. Indicate major accomplishments in each position. Please identify each role by employer, job title, and length of time held.
5. Are you prepared to seek election to this office in 2026?
6. Do you consider this job to be full-time or part-time?
7. In addition to the foregoing, please indicate any special qualifications, skills, training, or achievements you possess which are relevant to consideration for this position.

From: [Donna Schmidt](#)
To: [CCC Jobs](#)
Subject: Auditor-Controller
Date: Friday, March 7, 2025 12:18:32 PM
Attachments: [image.png](#)
[Resume-Controller.docx](#)

Attached, please see my application and resume for the above-referenced position.

Supplemental Questionnaire

1. Are you a United States Citizen? **Yes**
2. Are you registered to vote in the State of California? **Yes**
3. Are you a resident of Contra Costa County? **No**
4. Describe specific public service or private sector positions you have held which you believe best qualify you for the position of Auditor-Controller. Indicate major accomplishments in each position. Please identify each role by employer, job title, and length of time held.

# of Yrs.	Employer	Area	Job Title	Major Accomplishments
5 yrs.	Hellman & Friedman	Private Equity/Fund Accounting	Fund Accountant/ Administrator of US & UK	Managed \$300M in Fund III; later set up London and NY offices and promoted to Administrator of NY, SF and London offices
2.25 yrs.	Pacific Maritime Association	Non-profit	Payroll Manager/ Sr. Accountant	Passed the CPP exam for payroll; lost the certification working for Celerity as we were running and selling the business at the same time and could not get to CPE units needed.
6 yrs.	Celerity Consulting Group	Professional Services	Director of Finance	Turned around a dying company and was able to sell 70% to a PE firm for millions.

5. Are you prepared to seek election to this office in 2026? **?**
6. Do you consider this job to be full-time or part-time? **Full time**
7. In addition to the foregoing, please indicate any special qualifications, skills, training, or achievements you possess which are relevant to consideration for this position. **I've passed all 4 parts of the CPA exam and have the work experience signed off. In order to be licensed, I would need to transfer another 30 hours from a previous endeavor and take the ethics exam. I've not completed this as I've not needed a CPA designation in any of my prior positions.**

Donna Schmidt

Education

B. S. Accounting, Golden Gate University

Experience

College of Marin (Contract)

February 2024 – December 2024

Responsible for analyzing Oracle ERP system and documenting processes for improvement.

Business Manager/Controller

May 2022 – February 2024

Liftech Consulting Inc. (Engineering Consultants)

Responsibilities include but are not limited to, managing a staff of 5. Responsible for the firm's overall financial plans and policies along with its accounting practices and the conduct of its relationship with lending institutions and the financial community. Directs banking, budgeting, audit, tax (including foreign state licensure and taxes, accounting, property taxes, leases, and insurance activity of the firm. Serves to monitor and has input into all commercial aspects of the firm, including contract review, claims coordination, and human resource (HR) benefit and policy monitoring. Maintain and update In-house manuals. Government reporting for census, EDD, city licenses for various cities, personal property tax statements, and residency certificates as required by law. Review depreciation schedules and inventory including monitoring cash flow.

Director of Finance

April 2016 – April 2022

Celerity Consulting Group (Gas & Utilities Consulting/eDiscovery)

Major Accomplishment

Instrumental in helping Celerity transact a partial sale of the company.

Accounting & Finance:

- Supervise finance staff of 1-2 in all accounting/finance functions, including billing and collections, accounts payable, credit card reconciliation, and accounts receivable.
- All month-end close tasks such as bank reconciliation, general ledger analysis, and monthly journal entries.
- Prepare monthly financial package for Officers, reporting on the organization by department and as a whole.
- Projections and forecasts.
- Develop and maintain annual budgets. Report on budget vs. actual.

Tax:

- Prepared documentation and support for annual federal and state tax preparation.
- Prepared monthly and quarterly revenue taxes for all office locations.
- Prepared and filed all annual business taxes.

Ad hoc:

- Converted payroll system from Paylocity to ADP.
- Converted accounting and billing system from Juris to NetSuite. The NetSuite implementation included both project and resource management modules.
- Spearheaded conversion from in-house HR to Insperity.
- Prepared documents and managed annual 401K audit.
- Prepared for and managed annual workers comp audit.
- Review and manage semi-monthly multistate payroll.

- Prepared and managed annual 401K audit and preparation of the 5500.
- Monthly commission calculations
- Quarterly bonus calculations.
- Annual risk management renewal.
- All internal/admin contract negotiations.
- Reviewed all legal documents/contracts.

Director of Finance & Human Resources
Alonzo King Lines Ballet (Non-Profit)

November 2014 – March 2016

Fiscal and Administrative Management

- In coordination with the Executive Director, the Creative Director, and Department Directors, develop annual budgets to meet financial needs of programs and general operations.
- Supervise finance staff and coordinate management of financial and administrative procedures to maintain fiscally sound programs and accounting systems.
- Supervise audits and tax preparation, including but not limited to, annual independent financial audit and IRS filings, workers compensation audit, sales tax returns (multiple state) and audits.
- Preparation of board financial reports, department expenditure and budget variance reports, grant reports, and all other fiscal reports.
- Oversee banking transactions and cash flow.
- Prepare bi-weekly payroll and weekly check run, ensure timely filing of all payroll reports, W-2s, 1099 and 1096.
- Monitor contract compliance for legal implications, address insurance requirements and financial responsibilities.
- Recommend appropriate insurance coverage (Directors & Officers, Commercial Liability, Workers Compensation, etc.) to the Executive Director and Board, based on annual audit and operations.
- Oversee rigorous fund tracking systems for grant proposals and reporting.
- Serve as primary liaison with Landlord and/or representative.

Human Resources Management

- Develop and implement appropriate human resources priorities and procedures, including training, career development, hiring and firing, and performance management.
- Ensure that staff have the equipment necessary to perform their functions efficiently – that all office machinery is functioning and oversee the IT consultant.
- Ensure that AKLB's growth is supported internally, including technology, financial management and human resources. Maximize business efficiencies without limiting program effectiveness. Refine systems, manuals, and procedures.

Consultant

March 2014 – August 2014

Various accounting/finance/payroll/HR projects.

Payroll Manager/Sr. Accountant
Pacific Maritime Association (Non-Profit)

November 2011 – February 2014
 11/11 – 7/12 as consultant

- Provide technical payroll expertise and analysis as needed to senior management in audit, budget, compliance, and tax reporting.
- Maintain and run the four scheduled payrolls (three semi-monthly and one monthly) and complete related review and reporting packages.
- Responsible for reporting and analysis of executive compensation and benefits for Form 990 reporting.
- Prepare quarterly workers compensation reporting for staff and PMA Longshore Payroll reporting to states and outside vendors and quarterly and annual tax filings, 5500 reporting, and other compliance-related returns for under the direction of the Assistant Controller.
- Senior level accounting work, including complex general ledger entries, reconciliations, and account analysis.

- Manage and prepare financial audit deliverables for annual 401(k) Plan audit, JPLRC risk management audit, and executive compensation review and prepare detailed analysis, supporting schedules and detailed internal control documents for PMA consolidated audit.
- Re-engineer accounting processes and procedures as necessary to improve the efficiency of work streams, visibility of information, and usefulness of the internal control and review process.

Director of Finance
Bricsnet FM America (Software)

August 2008 – September 2011

Finance

Responsible for oversight of the bookkeeping and financial reporting. Duties included, but were not limited to:

- Reported to the CEO.
- Responsible for controlling the associated financial risk and resources of a start-up software operation.
- Managed accounting staff.
- Prepared financial reports, budgets, cost reports and forecasts.
- Developed and prepared profitability reports.
- Daily monitoring of cash flow and prospective projection of cash needs.
- Responsible for the budgetary controls of the firm.
- Convert the accounting system from Peachtree to Quick Books On-Line.
- When downsized, performed all accounting functions from accounts payable to financial reporting.

Human Resources/Administration

Duties included, but were not limited to:

- Converted HR from TriNet outsource PEO to in-house.
- Implemented HR programs and policies.
- Coordinated payroll for all US employees in various locations throughout the US.
- Implemented and processed payrolls for Canadian and Dutch employees.
- Negotiated, initiated, and managed all health and benefits in US, Canada, and the Netherlands.
- Performed all hiring functions, including recruiting, interviewing, due diligence, and offers, and all termination functions.
- Building lease and contract negotiations and risk management.

Controller
Golden State Lumber (Lumber/Retail)

June 2007 – June 2008

- Reported to General Manager on location and CFO at corporate.
- All accounting and HR functions for a 94-employee lumber division.
- Directly managed 14 administrative and accounting employees.
- Coordinated administrative functions, including supervision of accounting and admin staff.
- Hiring of temporary and permanent employees.
- Employee relations.
- Expense management.
- System review of equipment needs.
- Preparation and presentation of monthly financials.
- Monthly meetings and presentation with Controllers and General Managers from the various divisions at corporate.
- Coordination of year-end close and financial reconciliation of all accounts.

Administration/Human Resources
Consultant Fund III Accountant
Hellman & Friedman, LLC (Private Equity)

January 2005 – May 2007
August 2001 - December 2004

Fund III Accountant (Consulting)

- Provided temporary management support for a private equity company; in charge of quarterly accounting for a multi-million-dollar fund; responded to investors' requests.

Human Resources for US and Europe (Staff) Duties included, but were not limited to:

- Human resource functions for San Francisco, London, and New York offices.
- Heavy administrative recruiting for San Francisco and New York.
- All hiring functions, including recruiting, interviewing, due diligence and offers for US admin staff.
- All termination functions for US admin staff.
- Managed Executive Assistants.
- All payroll functions for all offices, including London.
- Establish accounts/relations for London office.
- Risk Management for all offices.
- Corporate credit card management.
- Drafted staff handbook and implemented HR programs and policies.
- Converted existing ADP system from DOS to base.
- Coordinated with Farallon each year to negotiate and initiate health benefit policies.
- Managed all health benefits for US and Europe.

STATEMENT OF ECONOMIC INTERESTS
COVER PAGE
A PUBLIC DOCUMENT

Date Initial Filing Received
Filing Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Schmidt Donna Moore

1. Office, Agency, or Court

Agency Name (Do not use acronyms)

Contra Costa County

Division, Board, Department, District, if applicable

Your Position

Auditor-Controller

► If filing for multiple positions, list below or on an attachment. (Do not use acronyms)

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)

- State Judge, Retired Judge, Pro Tem Judge, or Court Commissioner (Statewide Jurisdiction)
- Multi-County _____ County of Contra Costa
- City of _____ Other _____

3. Type of Statement (Check at least one box)

- Annual:** The period covered is January 1, 2024, through December 31, 2024.
- Leaving Office:** Date Left ____/____/____ (Check one circle below.)
- The period covered is January 1, 2024, through the date of leaving office.
- Assuming Office:** Date assumed ____/____/____
- The period covered is ____/____/____, through the date of leaving office.
- Candidate:** Date of Election 04/01/2025 and office sought, if different than Part 1: _____

4. Schedule Summary (required)

► Total number of pages including this cover page: 24

Schedules attached

- Schedule A-1 - Investments** – schedule attached **Schedule C - Income, Loans, & Business Positions** – schedule attached
- Schedule A-2 - Investments** – schedule attached **Schedule D - Income – Gifts** – schedule attached
- Schedule B - Real Property** – schedule attached **Schedule E - Income – Gifts – Travel Payments** – schedule attached

-or- **None - No reportable interests on any schedule**

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 03/25/2025
(month, day, year)

Signature
(File the originally signed paper statement with your filing official.)

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

Investments must be itemized.
Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name
Donna Schmidt

▶ NAME OF BUSINESS ENTITY
Schwab

GENERAL DESCRIPTION OF THIS BUSINESS
Investment/IRA

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other **mutual funds**
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:
06 / **01** / **24** / / /24
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:
 / / /24 / / /24
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:
 / / /24 / / /24
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:
 / / /24 / / /24
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:
 / / /24 / / /24
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF THIS BUSINESS

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More *(Report on Schedule C)*

IF APPLICABLE, LIST DATE:
 / / /24 / / /24
 ACQUIRED DISPOSED

Comments: _____

SCHEDULE B
Interests in Real Property
(Including Rental Income)

Name
Donna Schmidt

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS


FAIR MARKET VALUE
 \$2,000 - \$10,000
 \$10,001 - \$100,000
 \$100,001 - \$1,000,000
 Over \$1,000,000

IF APPLICABLE, LIST DATE:
 ACQUIRED / / 24 DISPOSED / / 24

NATURE OF INTEREST
 Ownership/Deed of Trust Easement
 Leasehold _____ Yrs. remaining _____ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED
 \$0 - \$499 \$500 - \$1,000 \$1,001 - \$10,000
 \$10,001 - \$100,000 OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.
 None

▶ ASSESSOR'S PARCEL NUMBER OR STREET ADDRESS

CITY

FAIR MARKET VALUE
 \$2,000 - \$10,000
 \$10,001 - \$100,000
 \$100,001 - \$1,000,000
 Over \$1,000,000

IF APPLICABLE, LIST DATE:
 ACQUIRED / / 24 DISPOSED / / 24

NATURE OF INTEREST
 Ownership/Deed of Trust Easement
 Leasehold _____ Yrs. remaining _____ Other

IF RENTAL PROPERTY, GROSS INCOME RECEIVED
 \$0 - \$499 \$500 - \$1,000 \$1,001 - \$10,000
 \$10,001 - \$100,000 OVER \$100,000

SOURCES OF RENTAL INCOME: If you own a 10% or greater interest, list the name of each tenant that is a single source of income of \$10,000 or more.
 None

* You are not required to report loans from a commercial lending institution made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE TERM (Months/Years)
 _____% None _____

HIGHEST BALANCE DURING REPORTING PERIOD
 \$500 - \$1,000 \$1,001 - \$10,000
 \$10,001 - \$100,000 OVER \$100,000
 Guarantor, if applicable

NAME OF LENDER*

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

INTEREST RATE TERM (Months/Years)
 _____% None _____

HIGHEST BALANCE DURING REPORTING PERIOD
 \$500 - \$1,000 \$1,001 - \$10,000
 \$10,001 - \$100,000 OVER \$100,000
 Guarantor, if applicable

Comments: _____