

LEADERSHIP AND STRATEGIC EXPERIENCE

Ability to provide administrative, management, and professional leadership and direction for the Finance, Budget, and other divisions; develop, implement, and administer goals, objectives, and procedures for providing effective and efficient financial management services; plan, organize, direct, and coordinate the work of management, supervisory, professional, technical, and administrative personnel; delegate authority and responsibility; select, supervise, train, and evaluate staff; identify and respond to community and Executive/Board of Directors issues, concerns, and needs; analyze problems, identify alternative solutions, project consequences of proposed actions, and implement recommendations in support of goals; research, analyze, and evaluate new service delivery methods, procedures, and techniques; prepare and administer large and complex budgets; allocate limited resources in a cost effective manner; prepare clear and concise administrative and financial reports; interpret and apply the policies, procedures, laws, codes, and regulations pertaining to assigned programs and functions; communicate clearly and concisely, both orally and in writing; establish, maintain, and foster positive and harmonious working relationships, team spirit, and collaboration with those contacted in the course of work.

AREAS OF EXPERTISE

Auditing and accounting standards as prescribed by the Institute of Internal Auditors and Institute of Certified Public Accountants including Generally Accepted Accounting Principles (GAAP), Governmental Accounting Standards Board (GASB) promulgations, and Generally Accepted Auditing Standards (GAAS) operational characteristics, services, and activities of a comprehensive financial management program; grant funding and administration, public trust funds such as California Employer's Retiree Benefit Trust (CERBT); organization and management practices as applied to the analysis and evaluation of programs, policies, and operational needs; modern and complex principles and practices of financial program development and administration; political and legislative processes; advanced principles and practices of budget preparation and administration; principles of supervision, training, and performance evaluation; pertinent Federal, State, and local laws, codes, and regulations. Successful participation and submission of Annual Comprehensive Financial Report (ACFR) to the Government Finance Officers Association (GFOA) for consecutive years.

Other areas of expertise include:

- Financial Statement Preparation and Analysis
- Budget Preparation/Monitoring
- Overall Work Program (OWP) Preparation/Monitoring
- Amendments to Budget/OWP
- Indirect Cost Allocation Plans (ICAP)
- Internal/External Audits
- Coordination and Collaboration with Federal, State and Local Partner Agencies
- Staff Memos and Board Presentations
- Procurement
- ACFR Preparation and GFOA Awards
- Human Resource Functions
- Payroll
- Retirement Administration
- Benefit Administration
- Resourceful Supervisor
- Non-Profit Financial/Operational Management
- Business/Individual Income/Payroll/State Sales & Use Tax Returns

PROFESSIONAL EXPERIENCE

Section Director, Budgets and Financial Planning and Analysis, July 2022 – present

Metropolitan Transportation Commission (MTC), San Francisco, CA

Typical duties include, but are not limited to:

- Management oversight of the financial analysis, short and long-term forecasting, and strategic development, monitoring, and amendment of multi-million and multi-billion dollar capital and operating budgets of MTC, the Bay Area Toll Authority (BATA), the Bay Area Housing Authority (BAHA), the Bay Area Infrastructure Financing Authority (BAIFA), the Bay Area Housing Finance Authority (BAHFA), the Service Authority for Freeways and Expressways (SAFE), the Association of Bay Area Governments (ABAG), the ABAG Finance Authority for Nonprofits (FAN), ABAG Publicly Owned Energy Resources (POWER), and the San Francisco Bay Restoration Authority (SFBRA).
- Establishing the design of programs, analyzing needs and results, as well as leading and mentoring staff by providing performance oversight and clarifying performance expectations.
- Work collaboratively in a team environment with other MTC executives, directors and staff; and help reporting staff engage in MTC's long and short-term goals and objectives.
- Work cooperatively and collaboratively with staff from other agencies (local, regional, state, and federal) including public officials, nongovernmental organizations, and the general public.
- Plan and manage section work within time and budget limitations including succession planning, the mentoring and development of reporting staff.
- Research and analyze financial issues; seek out new solutions to finance operational problems and develop strategies and policies for ongoing control settings and the implementation of best practices.
- Stay current on all required rules and regulations and best practices for government agency financial management, reporting, and compliance.
- Translate broad policies into practical, implementable programs and actions.
- Lead and direct the operations of the budget, grants, and financial budget analysis teams.
- Oversee the preparation of financial reports for all boards and associated committees, attend governing meetings, and present reports and presentations as required and requested.
- Review, design, maintain, and oversee Budget internal controls and determine agencywide impacts.
- Oversee and lead the preparation of MTC's Overall Work Programs (OWP) per Federal government funding requirements.
- Exercises direct supervision over management, supervisory, professional, technical, and administrative staff.
- Oversee and direct the preparation of all operating and capital budgets; oversee contract encumbrance procedures, budget monitoring and reporting, and coordination of budgeting and expense monitoring with MTC sections and teams.
- In coordination with the Chief Financial Officer (CFO), assist with budget projections, tracking revenue trends, and researching and reporting on complex financial transactions.
- Lead operations, in partnership with various directors and staff throughout the agency, on the applications for and management of grants; oversee the financial management of grant funds.

- Lead reporting managers to review, update, and implement operational processes and procedures to ensure efficiencies and best practices, and in coordination with connected business operational teams ensuring effective operational support throughout the agency; discuss, inform, and lead staff on the integration and implementation of new revenue sources and new operational programs and projects.
- Participate as the CFO's senior leadership team, working with the agency's executives to ensure compliant and effective finance division operations.

Section Director, Financial Reporting and Operational Accounting, August 2018 – September 2022

Metropolitan Transportation Commission (MTC), San Francisco, CA

Typical duties include, but are not limited to:

- Management oversight of the financial operations of MTC, the Bay Area Toll Authority (BATA), the Bay Area Housing Authority (BAHA), the Bay Area Infrastructure Financing Authority (BAIFA), the Bay Area Housing Finance Authority (BAHFA), the Service Authority for Freeways and Expressways (SAFE), the Association of Bay Area Governments (ABAG), the ABAG Finance Authority for Nonprofits (FAN), ABAG Publicly Owned Energy Resources (POWER), and the San Francisco Bay Restoration Authority (SFBRA) and numerous affiliated entities.
- Establishing the design of programs, analyzing needs and results, as well as leading and mentoring staff by providing performance oversight and clarifying performance expectations.
- Work collaboratively in a team environment with other MTC executives, directors and staff; and facilitate stakeholder engagement in MTC's long and short-term goals and objectives.
- Provide support and financial presentations to the Audit Committee, other committees/boards, the MTC Commission, the ABAG Finance Committee, the ABAG Executive Board, and other ABAG committees.
- Work cooperatively and collaboratively with staff from other agencies (local, regional, state, and federal) including public officials, nongovernmental organizations, and the general public.
- Plan and manage section work within time and budget limitations including succession planning, the mentoring and development of reporting staff.
- Research and analyze financial issues; seek out new solutions to finance operational problems and develop strategies and policies for ongoing control settings and the implementation of best practices.
- Stay current on all required rules and regulations and best practices for government agency financial management, reporting, and compliance.
- Translate broad policies into practical, implementable programs and actions.
- Lead and direct the operations of the budget, grants, financial reporting, accounting, and payroll functions and teams.
- Oversee and direct MTC's Annual Comprehensive Financial Report (ACFR) reporting, GASB implementations, multiple annual audit processes including managing the contracts, and relationships with outside audit firms.
- Oversee the preparation of financial reports for all boards and associated committees, attend governing meetings, and present reports and presentations as required and requested.
- Review, design, maintain, and oversee Finance and Accounting internal controls.

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Cell: [REDACTED]

- Oversee and lead the preparation of MTC's Overall Work Programs (OWP) per Federal government funding requirements.
- Exercises direct supervision over management, supervisory, professional, technical, and administrative staff.
- Oversee and direct the preparation of all operating and capital budgets; oversee contract encumbrance procedures, budget monitoring and reporting, and coordination of budgeting and expense monitoring with MTC sections and teams.
- In coordination with the Chief Financial Officer (CFO), assist with budget projections, tracking revenue trends, and researching and reporting on complex financial transactions.
- Lead operations, in partnership with various directors and staff throughout the agency, on the applications for and management of grants; oversee the financial management of grant funds.
- Lead reporting managers to review, update, and implement operational processes and procedures to ensure efficiencies and best practices, and in coordination with connected business operational teams ensuring effective operational support throughout the agency; discuss, inform, and lead staff on the integration and implementation of new revenue sources and new operational programs and projects.
- Participate as the CFO's senior leadership team, working with the agency's executives to ensure compliant and effective finance division operations.

Director of Finance & Administrative Services, January 2008 – August 2018

Association of Monterey Bay Area Governments (AMBAG), Monterey, CA

Typical duties include, but are not limited to:

- Exercises direct supervision over management, supervisory, professional, technical, and administrative staff.
- Preparation and coordination of the annual Overall Work Program (OWP) and Budget, including amendments and proposed changes for Federal, State and Local partners.
- Adherence and compliance with Subpart F of Title 2 U.S Code Of Federal Regulations (CFR) Part 200, Uniform Administrative Requirements, Cost Principles, and Audit Requirement for Federal Awards (Uniform Guidance), Audits of States, Local Governments, and Non-Profit Organizations, including requirements relating to preparation of the Schedule of Expenditures of Federal Awards (SEFA).
- Preparation of the Indirect Cost Allocation Plan (ICAP).
- Pension and Other Post-Employment Benefits (OPEB) funding, investing and reporting requirements.
- Directs, prepares for and coordinates annual internal and external audits.
- Performs all payroll functions which may include preparation of payroll reporting, payroll tax preparation and year-end reporting.
- Assumes full management responsibility and leadership for all Finance Division services and activities including accounting, budget, grant management, contracts, auditing, and risk management.
- Providing and coordinating internal and external staff training for finance and human resource functions.
- Manages the development and implementation of Finance Division goals, objectives, policies, and priorities for each assigned service area; establish, within AMBAG policy, appropriate service and staffing levels; allocate resources accordingly.

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- Continuously monitors and evaluates the efficiency and effectiveness of service delivery methods and procedures; assesses and monitors work load, administrative and support systems, and internal reporting relationships; identifies opportunities for improvement; directs the implementation of changes.
- Represents the Finance Division to other partner agencies, the Board of Directors, elected officials and outside agencies; explains and interprets Finance Division programs, policies, and activities; negotiates and resolves sensitive, significant, and controversial issues.
- Provides audited financial statements in compliance with the GFOA ACFR program and submits annual for the award.
- Selects, trains, motivates, and evaluates Finance Division personnel; provides or coordinates staff training; works with employees to correct deficiencies.
- Plans, directs, and coordinates the Finance Division's Overall Work Program; meets with management staff to identify and resolve problems; assigns projects and programmatic areas of responsibility; reviews and evaluates work methods and procedures.
- Manages all financial and operational functions of AMBAG's non-profit arm, Regional Analysis and Planning Services, Inc. (RAPS) including tax return preparation and dissemination of information to the Board of Directors.
- Oversees the development and administration of the AMBAG and related agency budgets; directs the forecast of additional funds needed for staffing, equipment, materials, supplies and other expenditures; directs the monitoring of and approves expenditures; directs the preparation of and implements budgetary adjustments as necessary.
- Provides staff assistance to the Executive Director and AMBAG staff; prepares and presents staff reports and other necessary correspondence.
- Conducts a variety of financial analysis, investigations, and operational studies; recommends modifications to Finance programs, policies, and procedures as appropriate.
- Provides financial oversight of AMBAG budget by reviewing and approving contracts and purchase orders, reviewing all grant applications and preparing periodic regular reports to management, the Executive Finance Committee and Board of Directors on the financial status of the organization's budgets and programs.
- Reviews cash flow to ensure that resources are available to pay invoices from vendors and subrecipients, payroll and related costs, and other payments; ensures that invoicing to funding agencies is done expeditiously and accurately.
- Oversees the process of amending the AMBAG budget as needed and receiving approval from funding agencies.
- Stays abreast of new trends and innovations in the field of financial management and information systems.
- Responds to and resolves difficult and sensitive inquiries and complaints.
- Performs human resource, payroll and other related duties and responsibilities as assigned.
- Committee member and participant for the fiscal/audit/bylaw/expert feedback committees for the California Special District Association (CSDA).
- GFOA Special Review Committee member and participant for annual ACFR reviews.
- Assistant other city, county, jurisdiction agencies and transportation agencies with finance/human resources/administrative/procurement duties as a consultant or by agreement.

Business Faculty Instructor, January 2006 – January 2008

Heald College, LLC, Salinas, CA

- Facilitate student learning in program areas through a variety of methodologies, types of assessments, and an environment conducive to student success.
- Provide quality instruction, meet course objectives, requirements, and student learning outcomes. Manage the classroom environment using a variety of teaching strategies; support students and their effort to succeed, provide formative and summative assessment of student learning, facilitate a safe, positive and supportive learning environment.

Financial Specialist, January 2005 – February 2006

Robert Half International, Inc., San Jose, CA

- Specialization in the preparation of tax returns and tax planning of all entities, accounting, financial management, payroll, audits, compilations, reviews, and many other functions in the accounting field.
- Provides consultation to clients regarding areas in which they are lacking. Whether that derives from employee turnover or a new segment to the company.

Accountant/Auditor, February 2000 – December 2004

Hayashi & Wayland Accounting & Consulting LLP, Salinas, CA

- Coordinated and led engagement planning process, including scheduling of planning meetings and fieldwork, design of testwork procedures and audit program preparation, established more effective internal controls, etc.
- Trained and supervised 6 – 10 personnel in accounting, auditing and software skills in client, office and classroom settings. Demonstrated effective project management skills by inspiring teamwork and responsibility with engagement team members during audit engagements. Developed effective use of current technology (***One of the first firm members to utilize and implement the paperless audit program***) and tools to enhance the effectiveness of deliverables and services.
- Prepared income tax returns and advised clients of the tax advantages and disadvantages.
- Prepared payroll tax returns, business property statements, and business valuations, while meeting deadlines and client needs.
- Examined journal vouchers, general ledger reconciliations, and numerous analyses including P&L variances, inter-company accounts and aging.

TECHNICAL EXPERTISE

Central Square, OneSolutions, Ceridian, Paychex Preview, Paychex Flex, Time Labor Online (TLO), Kronos, Paychex Stratus Time, PeopleSoft, QuickBooks, Peachtree, Mas90, BlackBaud, Raisers Edge, Creative Solutions, Account Trial Balance (ATB), Lawson, RSM McGladery, Lacerte, CCH, CFS, PPC, Superforms, Citrix, Microsoft Office Suite, Adobe/Creative Cloud, PeopleSoft HR/Financial, including extensive Mac/Window-based accounting, tax, and business valuation software.

EDUCATION AND CERTIFICATIONS

Golden Gate University, San Francisco, CA

Masters of Science, Taxation (Fall of 2008)

Bachelor of Science, Accounting (Spring 2003)

1999-2001 The National Dean's List

Actively pursuing the Certified Public Finance Officer (CPFO) certification