



**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

TREASURER TAX COLLECTOR APPLICATION

1. Name: _____
 (Last Name) (First Name) (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: _____

Names of colleges / universities attended		Course of Study / Major	Degree Awarded	Degree Type
A)			Yes <input type="checkbox"/> No <input type="checkbox"/>	
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 Treasurer-Tax Collector. 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) <u>From</u> <u>To</u></p> <hr/> <p>Total: <u>Yrs.</u> <u>Mos.</u></p> <hr/> <p>Hrs. per week _____ . Volunteer <input type="checkbox"/></p>	<p>Title</p> <hr/> <p>Employer's Name and Address</p>	<p>Duties Performed</p>
<p>B) Dates (Month, Day, Year) <u>From</u> <u>To</u></p> <hr/> <p>Total: <u>Yrs.</u> <u>Mos.</u></p> <hr/> <p>Hrs. per week _____ . Volunteer <input type="checkbox"/></p>	<p>Title</p> <hr/> <p>Employer's Name and Address</p>	<p>Duties Performed</p>
<p>C) Dates (Month, Day, Year) <u>From</u> <u>To</u></p> <hr/> <p>Total: <u>Yrs.</u> <u>Mos.</u></p> <hr/> <p>Hrs. per week _____ . Volunteer <input type="checkbox"/></p>	<p>Title</p> <hr/> <p>Employer's Name and Address</p>	<p>Duties Performed</p>
<p>D) Dates (Month, Day, Year) <u>From</u> <u>To</u></p> <hr/> <p>Total: <u>Yrs.</u> <u>Mos.</u></p> <hr/> <p>Hrs. per week _____ . Volunteer <input type="checkbox"/></p>	<p>Title</p> <hr/> <p>Employer's Name and Address</p>	<p>Duties Performed</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: _____

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 Treasurer-Tax Collector.

Sign Name: _____ Date: _____

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 Wednesday, November 22, 2023 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 Treasurer Tax Collector. 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.

Treasurer & Tax Collector Application 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?

Not presently, however I will move back to my home in Contra Costa County prior to appointment.

4. Describe specific public service or private sector positions you have held which you believe best qualify you for the position of Treasurer Tax Collector. Indicate major accomplishments in each position. Please identify each role by employer, job title, and length of time held.

I believe that the best indicator of my qualifications for the job of Treasurer Tax Collector is my current role as Treasurer & Tax Collector for the County of Yuba, a position I've held since January of 2010. The laws governing these positions are identical as are duties, responsibilities, and complexities of the job. While ordinances do differ from jurisdiction to jurisdiction, my involvement in a variety of boards and organizations will complement the locally specific tasks and responsibilities of the office. As an elected Treasurer-Tax Collector I oversee the operations of the treasury, tax collections, general collections, business licenses, and debt functions for the County. Each function requires unique knowledge, yet with the are so intertwined that many of their functions are closely related. In addition, in this role I serve on the deferred compensation committee, budget committee, debt committee, and retirement oversight. I also serve on the retirement board for the Yuba Community College District which I understand would be similar to the responsibilities and duties that this position currently serves in Contra Costa County. As the Treasurer & Tax Collector I am very proud to have worked with the State Controller and California Finance Housing Agency to help re-establish the procedures that have brought back several statewide tax payment programs administered by the State of California, for the benefit of all qualified tax payers. These programs have been able to keep our most vulnerable home owners in their properties and brought their taxes current. Truly win-win scenarios that we strive for as public servants. I would count the largest accomplishment in my tenure as Treasurer & Tax Collector to be the recognition I received as the Treasurer & Tax Collector of the year in 2018-2019. I am one of four recipients of this award in the State of California in the last thirty years.

Working chronologically in reverse from my last 13 years as elected Treasurer & Tax Collector, the next job that would qualify me for the role of Contra Costa County Treasurer Tax Collector would be my time spent as the Assistant Treasurer & Tax Collector for the County of Yuba from June 2007 to December 2009. The major accomplishments in that role and specifically during that time was the management and oversight of our debt and investment portfolios. Our portfolios had zero losses during the great recession and banking crisis nor did our debt experience issues with the bankruptcies of the major bond insurers and the investments held in their trusts. In addition to this accomplishment, I was also in charge of changing our investment software and processes as well as overseeing the modernization of our tax system and general policy and procedures.

My time spent as a fixed income trader and sales coverage of institutional accounts including California municipal entities with Cantor Fitzgerald Debt Capital Markets (1/06-5/07), CIBC World Markets (6/03-1/06), Merrill Lynch, Specialized Institutional Group (2/00-6/03) prepared me for mastery of the treasury, investment, debt and retirement account oversight. During this tenure I held Series 7, 63 and 65 certifications as a registered investment advisor. During these jobs I was responsible for daily trading activity in excess of billions of dollars a day on top of establishing cash flow models and assisting with the creation and execution of investment plans for my clients.

5. Are you prepared to seek election to this office in 2026?

Yes

6. Do you consider this job to be full-time or part-time?

A public servant is a full-time position. Even more so when it is an elected officer's position, so yes I do consider the role of the Treasurer & Tax Collector to be a full-time position and as such I treat the position with the duty and care that the oath of office obligates by upholding the oath when sworn in.

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 have been fortunate to serve on several statewide boards that have further enhanced my ability to serve in the role as Treasurer Tax Collector. In my current role as Treasurer on the board of directors for CalTRUST I oversee the general operations of this Joint Powers investment authority that manages \$3.25 billion for more than 100 California public agencies. As a trustee I have access to daily economic data and fixed income market updates. This helps me manage the County's investment pool efficiently and effectively mitigating risk and achieving safe, secure returns by applying this market insight to the County's investment plan.

In addition to my role as a Trustee for CalTRUST for investment expertise, I also have served on a board of directors for Sierra Central Credit Union (SCCU). This role gives me direct insight into the inner workings of the banking system, banking laws, cash handling, electronic fund transfers, transactional procedures and risks presented to banking institutions, their clients and ultimately individuals. As a trustee I have annual trainings on banking topics, cyber security and current laws. This has allowed me to continually update the County's Treasury operations to maintain efficiency and utilize cutting edge risk mitigation measures to better protect the County Treasury and the public's funds.

On the tax collector's side, I have been honored to serve as the chair of the State Controller's Property Tax Collections Committee since it's re-inception under State Controller John Chiang in 2015 as well as leading this committee under Controller Betty Yee and currently Malia Cohen. This committee is charged with advising, instructing, directing and maintaining the policies, manuals and procedures for local property tax collection across the State of California.

I also have been the legislative chair for the California Association of County Treasurers and Tax Collectors (CACTTC) since 2018 and a member of the committee since 2010. This committee is the body that reviews all legislative proposals and testifies on matters that impact the tax collection and treasury operations of Counties in California. This has allowed me to proactively align the operations of the County of Yuba with the upcoming legal changes. It also has allowed me to leverage the knowledge and expertise of the other 57 County experts regarding the laws

that govern our operations. This collaboration has been critical to the success of our operations and is the backbone of successful public service. With this in mind I have remained active with several professional organizations comprised of Treasurers, Tax Collectors and Finance Officers from around the state as well as around the country.

My years of investment experience prior to joining public service provided my knowledge and certifications as a registered investment advisor. I have continued to increase my knowledge through trainings and certification with my service to the State Treasurer's Office through their California Debt and Investment Advisory Commission's steering committee on their training programs. Further I have a certification as a Certified California Municipal Treasurer (CCMT). Understanding that the Treasurer Tax Collector also serves on the County's retirement board, I too have experience doing so as a member of the Yuba Community College District's Retirement Board.

I would also like to submit a list of references of my peers and colleagues with whom I have worked closely with as a member of these various organizations and are also fellow County Treasurer and Tax Collectors themselves.

*Russell Watts, Contra Costa County
Treasurer- Tax Collector
Russell.watts@tax.cccounty.us*



*Sandie Arnott, San Mateo County
Treasurer- Tax Collector
sarnott@smcgov.org*



*Mary A. Zeeb, Monterey County
Treasurer- Tax Collector
zeebm@co.monterey.ca.us*



*Jose Cisneros, City and County of San Francisco
Treasurer- Tax Collector
Jose.cisneros@sfgov.org*



*Charles A. Lomeli, Solano County
Treasurer-Tax Collector-County Clerk
calomeli@solanocounty.com*



Dan M. Mierzwa



November 21, 2023

Contra Costa County Human Resources Department

RE: Treasurer-Tax Collector Recruitment

Dear Hiring Manager,

As an experienced elected County Treasurer & Tax Collector, the recruitment for the Treasurer-Tax Collector position with Contra Costa County has sparked my interest. When reviewing the position requirements and your organization's website, I was excited to find that my qualifications and personal strengths align with your needs and mission. This opportunity also provides me the ability to return home and serve the community where I grew up and started my career and family.

I bring a comprehensive set of skills that I believe will be valuable to Contra Costa County. In my current role as the Yuba County Treasurer & Tax Collector, I am intimately familiar with the state statutes and codes that govern the management of public funds as well as the tax collection activities across the spectrum of property taxes. With over two decades of experience in investment management, I have developed the skills and knowledge to be a trustworthy steward of public funds. My collaboration, people-oriented, and compassionate approach has also enhanced my leadership abilities.

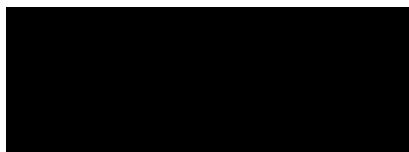
I am eager to contribute my talents and critical thinking skills toward your team's effort. As a proven leader of a county treasury and tax collection department, I have demonstrated skills in effective communication and building strong professional relationships. I hope to bring these assets to Contra Costa County.

Please review my enclosed resume, application, and supplemental questionnaire for a more in-depth illustration of my work history and accomplishments. I believe my experience as a California Treasurer-Tax Collector makes me the perfect candidate for the position as I have the unique ability to step in and immediately get to work serving the community and its constituents. I would appreciate the opportunity to be considered for the position of Treasurer-Tax Collector and look forward to your reply.

Thank you for your time and consideration of my candidacy.

Sincerely,
Dan Mierzwa

Dan M. Mierzwa



SUMMARY

A seasoned professional and influential leader with an adept ability to find consensus and efficiently carry out governmental and regulated mandates while still maintaining the customer centric approach. Over twenty years in investment management, initially as an investment advisor and then as a portfolio manager and investment officer. Strong leader with conflict resolution skills. Proven ability to implement strategic changes and employee development.

SKILLS

- Strategic Planning and Execution
- Fiscal Accountability
- Prime Negotiator by Building Consensus and Commonality
- High Productivity with Collaborative Approachability
- Talent Training, Development, and Mentoring
- Customer Service Centric Approach
- Budget Management
- Risk Management and Performance Metrics
- Government Code and Revenue & Taxation Expertise
- Investment Expertise in a Variety of Markets
- Legislative Policy Development and Integration
- Governance Leadership Experience

WORK EXPERIENCE

County of Yuba, Treasurer & Tax Collector, 1/10- Current

Treasurer & Tax Collector

Responsible for managing both the Treasury and Tax Collection functions of the office. Provide pooled treasury services for all participants within the county, special districts, and schools. Manage and invest the county's pooled funds in a prudent and safe manner. Keep up-to-date with the latest changes to Revenue and Taxation as well as Government codes, economic forecasts, Federal Reserve policies and the state budget disbursements. Provide insight and advice for bond issuance for the county, schools, and the pooled participants, as well as managing the reinvestment of those proceeds. Responsible for the billing, collection, and oversight of all secured, unsecured, supplemental, and transient occupancy taxes as well as various licenses issued by the County as governed by the California Revenue and Taxation Code, Government Code, Code of Civil Procedures as well as local ordinances. Led a training program for staff to develop their skills and grow their careers inside our organization.

County of Yuba, Treasurer & Tax Collector's Office, 6/07-12/09

Assistant Treasurer & Tax Collector

Responsible for overseeing both the Treasury and Tax Collection functions of the office. Provided pooled treasury services for all participants within the county, special districts, and schools. Verified and processed deposit receipts. Cleared county, special district, and school warrants issued by those entities. Handled the daily cash flow needs of the county and special districts to help determine the liquidity necessary to maintain working capital for all depositors. Managed and invested the county's pooled funds in a prudent and safe manner. Administered the billing, collection, and reporting of property tax revenues. Oversaw the Tax Defaulted Property Tax Sales. Provided insight and advice for bond issuance for the county, schools, and the pooled participants, as well as managed the reinvestment of those proceeds.

Cantor Fitzgerald, Debt Capital Markets, 1/06 – 5/07

Assistant Vice President

Grew existing account relationships and prospected new clients. Recommended fixed income products for clients' portfolios and introduced accounts to a range of investment options. Proactively proposed swap ideas for portfolios based upon account-specific investment policies and beliefs about the yield curve and future rate changes. Sold and purchased all fixed income products with an emphasis on investment grade debt, federal agencies, and government securities. Prepared presentations for swap proposals as well as providing current market economic indicators for accounts review. Advised clients on portfolio management and helped facilitate cash flow analysis for specific accounts fiscal needs.

CIBC World Markets, Debt Capital Markets, 6/03 – 1/06

Institutional Fixed Income Sales

Covered clients needs for money market investments out to five years on all fixed income products. Managed all pending offer and bid transactions between the sales desk and the trading desk. Designed swap proposal investment ideas for accounts based on their individual portfolio needs. Focused on short duration investments and structured products, such as floating rate notes and Step-up coupon bonds, based upon the yield curve and Federal Reserve's consistent and measure pace to raising the Fed Funds Rate. Charted various products yields as the fed funds rate raised, as well as maintain clients' portfolios in one central location to enable one location to find all the accounts positions and enhance swap proposals between clients and supplement the firms and streets current positions.

Merrill Lynch, Specialized Institutional Group, 2/00 – 6/03

Trading and Fixed Income Sales

Responsible for maintaining the sales group's account base and daily transactions. Conducted over \$5 billion in fixed income transactions on an average daily basis. Provided lead coverage on all money market products as well as all odd-lot inquiries from accounts in longer maturity investments. Directed trading and sales on all fixed income products in support of the trading and sales desks respectively. In addition to daily calls and transactions with accounts, set-up a daily economic update list to keep accounts informed of all of the latest financial market indicators and notes from the Federal Reserve meetings. Tracked all transactions and inquiries to set-up account profiles to help the desk better identify what the account was interested in, in addition to knowing when the clients' portfolios had upcoming maturities and called securities. Created and maintained all the records and files regarding the accounts from authorized individuals to trade to investments that met their investment policies and specific strategies.

EDUCATION

University of Puget Sound, Tacoma, WA

Bachelor of Arts in Economics with Finance and Business Administration minors

Member of Omicron Delta Epsilon, Economics International Honor Society

Certified California Municipal Treasurer (CCMT) certification

PROFESSIONAL AFFILIATIONS

California Association of County Treasurers and Tax Collectors (CACTTC), 6/07-current

President 6/14-6/15, Legislative Chair 6/18-current, Executive Committee member 6/10-current

California Bond Oversight Committee (CalBOC), 1/13-12/20

Director

California Credit Union League (CCUL) 5/10-current

Member

California Debt and Investment Advisory Commission (CDIAC), 6/18-current

Steering Committee advisor

California Municipal Treasurers Association (CMTA), 7/15-current

Member

California Society of Municipal Finance Officers (CSMFO), 7/23-current

Member

California Statewide Communities Development Authority (CSCDA), 1/10-current

Commissioner 1/10-current, Secretary 3/21-current

CalTRUST, Board of Directors, 3/22-current

Trustee, 3/22-current, Treasurer 4/23-current

Financial Industry Regulatory Authority, NASD member 2/00-7/07

Member

National Association of County Collectors, Treasurers & Finance Officers (NACCTFO), 7/14-current

Member

Sierra Central Credit Union (SCCU), Board of Directors, 5/10-current

Chairman 5/18-5/20

State Controller's Property Tax Collections Committee, 1/15-current

Chairman 1/15-current

Yuba Community College District Retirement Board (YCCD), 2/13-current

Director

Yuba Levee Finance Authority (YLFA), 1/10-current

Vice Chair