



**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:** LOPEZ OBDULIA "LULIS"  
(Last Name) (First Name) (Middle Name)

**2. Address:** [Redacted]

**3. Phones:** [Redacted]

**4. Email Address:** [Redacted]

**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: Bachelor of Arts

Names of colleges / universities attended		Course of Study / Major	Degree Awarded		Degree Type
A)	College of Sequoias	Business emphasis in Accounting	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	Associate of Arts (AA)
B)	Fresno Pacific University	Business Management	Yes <input checked="" type="checkbox"/>	No <input type="checkbox"/>	Bachelor of Arts (BA)
C)			Yes <input type="checkbox"/>	No <input type="checkbox"/>	
D) Other schools / training completed: 1. CSAC -Senior Exec credentials (2017) 2. IPMA-HR (2015)		Course Studied foundations of leadership and policy competencies HR certification	Hours Completed		Certificate Awarded: Yes <input checked="" 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>  10/31/2016    present</p> <p>Total: <u>Yrs.</u>    <u>Mos.</u> 7 yrs            1 mos</p> <p>Hrs. per week <u>40+</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title <b>Assistant County Tax Collector</b></p> <hr/> <p style="text-align: center;">Employer's Name and Address Contra Costa County- Treasurer Tax Collector 625 Court St Room 100 Martinez, CA 94553</p>	<p style="text-align: center;">Duties Performed</p> <p>Plan, organize, supervise Tax and Casiering staff. Review policies &amp; procedures and make changes based on Revenue &amp; Taxation Code. Analyze new legislations and monitor all Tax Contracts. Prepare tax unit budget. Oversight of Business License, Transient Occupancy Tax and Cannabis Tax. Annually collection rate of over 99% of Property Taxes, special levies for cities, school district, special district, and county government. Mail out over 45k unsecured tax bills with collection rate of 96%. Oversight of annual Public Auction. Member of Bankruptcy and Tax Manual Committee for the last 6 years. In the absence of TTC, attend the CCCERA Retirement Board Meeting.</p>
<p>B) Dates (Month, Day, Year) <u>From</u>      <u>To</u>  08/01/2010    10/30/2016</p> <p>Total: <u>Yrs.</u>    <u>Mos.</u> 6 yrs    2 mos</p> <p>Hrs. per week <u>40+</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title <b>Fiscal Manager</b></p> <hr/> <p style="text-align: center;">Employer's Name and Address Tulare County - CAO - General Services 5953 S Mooney Blvd Visalia, CA 93277</p>	<p style="text-align: center;">Duties Performed</p> <p>Manage Administration office staff, operations and General Fund and Internal Service Funds. Work with Department Head or fiscal staff to review departmental ISF budget. Responsible for Human Resources recruitment, conduct discipline process, payroll, training, safety and planning. Oversight of Capital Projects Fiscal responsibilities. Work with CAO for mid-year budget review. Work with Risk management to complete necessary OSHA reporting requirements. Work with County IT Client Specialist to meet departmental goals and special needs. Prepare year end report for Auditor's for ACFR and Countywide Cost Allocation Plan. Oversight of Capital Projects fiscal responsibilities.</p>
<p>C) Dates (Month, Day, Year) <u>From</u>      <u>To</u>  03/15/2008    07/30/2010</p> <p>Total: <u>Yrs.</u>    <u>Mos.</u> 2 yrs    4 mos</p> <p>Hrs. per week <u>40+</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title <b>Administrative Services Officer II</b></p> <hr/> <p style="text-align: center;">Employer's Name and Address Tulare County - Health and Human Services Agency (HHS)A 5957 S Mooney Blvd Visalia, CA 93277</p>	<p style="text-align: center;">Duties Performed</p> <p>Manage 50+ staff in Account receivable unit. Of HHS. Direct, monitor billing for various. Financial classes. Work with IT staff to make updates or changes to billing systems. Make changes to Procedures based on State regulations. Monitor Petty cash in county clinics and made quarterly cash audits to all HHS. clinics and Human Services Offices.</p>
<p>D) Dates (Month, Day, Year) <u>From</u>      <u>To</u>  11/01/2001    03/14/2008</p> <p>Total: <u>Yrs.</u>    <u>Mos.</u> 6 yrs    4 mos</p> <p>Hrs. per week <u>40+</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title <b>Accountant I - III</b></p> <hr/> <p style="text-align: center;">Employer's Name and Address Tulare County - Health and Human Services Agency 5957 S Mooney Blvd Visalia, CA 93277</p>	<p style="text-align: center;">Duties Performed</p> <p>Responsible for various Grant billing for State and Federal Grants with a budget of 20k to 3 million, Trust Funds, Realignment Report for Human Services, Mental Health And Health, Statement of Fees, CFDA reporting, Quarterly cash audit for all county clinics, ACFR reporting to the Auditor's, Agency Allocation Cost. Budget Adjustments. Part of team to implement new County finance system -AFIN. Bank reconciliation of various Agency bank accounts. Review internal service funds charges for HHS. that included over 100 agency Units. Monitor 300 million Agency budget, monthly reconciliation of revenue and expense report. Annual review of all trust funds for compliance with Welfare and Institution Codes. Set up new bank accounts at County bank branch.</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: Obdulia "Lulis" Lopez Date: 11/20/2023  
Obdulia "Lulis" Lopez (Nov 20, 2023 18:17 PST)

### 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](mailto: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? Yes
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.

Employer	Job Title	Length of Time	Major Accomplishments
Contra Costa County – Treasurer- Tax Collector	Assistant County Tax Collector	October 2016 – present	<ul style="list-style-type: none"> <li>• Over 99% collection rate of Secured Property Taxes</li> <li>• Over 96% collection rate of Unsecured Taxes</li> <li>• Request for Proposal for a new tax system</li> <li>• Annual Public Auctions</li> <li>• Continue services during Pandemic and over 99% collection rate.</li> <li>• Oversight of HR – recruiting and discipline</li> </ul>
County of Tulare County – CAO General Services	Fiscal Manager	August 2010 – October 2016	<ul style="list-style-type: none"> <li>• Implemented various systems for Internal Service Funds (ISF) billing to county departments.</li> <li>• Internal Service Fund rate book</li> <li>• Meet with county departments to meet ISF budget goals.</li> <li>• Human Resources- recruitment, discipline, safety, training</li> <li>• Accounts payable and receivable</li> <li>• Facilities phone line for all work order request</li> </ul>
County of Tulare – Health and Human Services Agency	Administrative Services Officer II	March 2008 – July 2010	<ul style="list-style-type: none"> <li>• Oversight of 50+ employees in account receivable</li> <li>• Billing of various financial classes and over issuance food stamps and cash aid</li> <li>• Cash audit of county clinics and Human Services offices</li> </ul>

OBDULIA “LULIS” LOPEZ

			<ul style="list-style-type: none"> <li>• Responsible for Accounting System and implement changes.</li> <li>• Prepare budget for Account Receivable Unit</li> </ul>
County of Tulare – Health and Human Services Agency	Accountant III	December 2005 – March 2008	<ul style="list-style-type: none"> <li>• Oversight of Accountant I/II to assign and evaluate work performance.</li> <li>• Grant Invoicing of various State and Federal Programs with a budget of 20k to 3 million</li> <li>• Bank Reconciliations</li> <li>• Monthly expense and revenue reconciliation</li> <li>• Outside Auditor’s liaison</li> </ul>
County of Tulare – Health and Human Services Agency	Accountant II	November 2002 – December 2005	<ul style="list-style-type: none"> <li>• Realignment Report</li> <li>• Trust funds reconciliation</li> <li>• Monitor 300 mill budget.</li> <li>• CFDA reporting</li> <li>• Set up new bank accounts.</li> <li>• Annual review of Agency trust funds for compliance with Welfare &amp; Institution Codes</li> </ul>
County of Tulare – Health and Human Services Agency	Accountant I	November 2001 – November 2002	<ul style="list-style-type: none"> <li>• Redistribute internal service funds expenses.</li> <li>• Statement of fees</li> <li>• State/federal funding</li> <li>• Bank reconciliation</li> <li>• Revenue/expense monthly reconciliation</li> </ul>
County of Tulare – Treasurer – Tax Collector	County Financial Technician II	December 1997 -October 2001	<ul style="list-style-type: none"> <li>• Daily Deposits of cash/checks</li> <li>• Balance trust funds</li> <li>• Public Auction</li> <li>• Liaison with State Controller Office</li> <li>•</li> </ul>
County of Tulare – Department of Child Support	Senior Account Clerk	August 1997 – December 1997	<ul style="list-style-type: none"> <li>• Set up accounts base on court orders.</li> <li>• File liens</li> <li>• Time study</li> <li>• Monthly state reports</li> <li>• Fastest to set up bank accounts</li> </ul>
County of Tulare – Treasurer – Tax Collector	Account Clerk/County Financial Technician I	March 1995 – August 1997	<ul style="list-style-type: none"> <li>• First bilingual staff member</li> <li>• Translated all Tax Collector literature.</li> <li>• Process all shortage/overage payments.</li> <li>• Tax Sale</li> <li>• Implement new tax sale system</li> </ul>

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? The position is a full-time position with 40+ hours per week.
  
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?

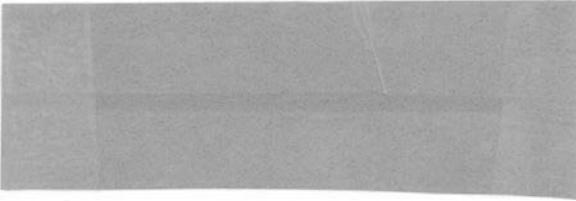
During my 29-year tenure as a government employee, I have the privilege of serving in various capacities within the Treasurer-Tax Collector Office (TTC) of both Contra Costa County and Tulare County for a total of 14 years. Over the past 15 years, my experience has been in management positions, which greatly contributes to the Treasurer- Tax Collector position. Throughout my career, I have successfully handled county budgets, including internal service funds budget and Capital Projects Fund, while closely collaborating with Human Resources, Risk, and County Counsel departments. Additionally, my experience in General Services has allowed me to work closely with department heads in meeting their budgetary needs despite constraints.

I have always embraced opportunities to expand my skill set, leading to my certifications in Human Resources from the International Public Management Association of Human Resources (IMPA-HR) and Senior Executive Credentials from the County State Association of Counties (CSAC). My proactive and determined nature has enabled me to thrive within the organization, as I confidently tackle new challenges to achieve departmental goals and objectives.

Furthermore, I have actively represented the TTC Office by delivering presentations at Contra Costa Taxpayers Association, O'Hara Park School Career Day, Advisory Council on Equal Employment Opportunity, Hercules Democratic Club, and West County Forum. In the absence of the Treasurer-Tax Collector, I recently attended the CCCERA Retirement Meeting as a representative. To gain knowledge and prepare for CCCERA trustee, I have completed the State Association of County Retirement Systems (SACRS) Public Pension Investment Management Program at UC Berkeley and the California Association of Public Retirement Systems (CALAPRS) Principal Pension Governance at Pepperdine University.

Over the past three years, significant improvements have been made within the TTC office. We successfully implemented a new cashiering system, introduced a user-friendly online platform for public auctions, and adapted our processes to comply with Wells Fargo's policy changes in Property Tax payments. Currently, I am actively involved in developing a Request for Proposal (RFP) for a modernized tax system, aiming to replace the outdated one. This collaborative effort with the Auditor's Office is driven by the shared goal of enhancing efficiency and effectiveness in our operations.

# Obdulia “Lulis” Lopez



Board of Supervisors of Contra Costa County  
1025 Escobar Street  
Martinez, CA 94553

Dear Board of Supervisors:

I am pleased to present my application for the position of Treasurer – Tax Collector, which I consider a great honor and privilege. I am also grateful for the recommendation I have received from the current Treasurer-Tax Collector, Russell Watts. Having accumulated over 29 years of valuable government experience, including 14 years specifically with the Treasurer – Tax Collector Office, I am confident in my ability to make a meaningful contribution to the ongoing success and effectiveness of the office and continue with the critical project of the RFP for a new tax system.

Throughout my career, I have developed a strong service-oriented approach, consistently striving to provide outstanding customer service. As Assistant County Tax Collector, I have interacted with a diverse range of taxpayers, helping them navigate complex tax-related processes and addressing their concerns. This experience has honed my customer service skills and reinforced the importance of empathy and effective communication in resolving issues.

Furthermore, my decision-making abilities are another asset that makes me well-suited for this position. As Assistant County Tax Collector, I am entrusted with the responsibility of making well-informed decisions based on Revenue & Taxation Codes, Government Codes, and County policies. This necessitates extensive research, critical analysis, and a comprehensive understanding of the legal framework surrounding these Codes. These decision-making skills will directly translate to the role of Treasurer – Tax Collector, where I will be required to evaluate tax-related and Treasury matters to make sound judgments, ensuring compliance and optimizing revenue collection for Contra Costa County.

Effective leadership requires collaboration, which is one of my strengths. I work closely with my colleagues, Auditor and Assessor’s Office to tackle complex tax matters, simplify procedures, and introduce enhancements. I firmly believe that transparent communication, attentive listening, and teamwork is essential for the department's triumph.

As an Assistant County Tax Collector and public servant for over 29 years, I have gained the essential skills and strengths required to thrive as a Treasurer-Tax Collector. With my emphasis on

customer service, adept decision-making skills, and collaborative approach, I am confident that I can continue to make a positive impact on the Contra Costa County Treasurer-Tax Collector's Office.

I am excited about the opportunity to continue the mission and vision of Contra Costa County Treasurer- Tax Collector Office. Thank you for considering my application and look forward to hearing from you.

Sincerely,

Obdulia "Lulis" Lopez

Obdulia "Lulis" Lopez (Nov 20, 2023 15:01 PST)

**Lulis Lopez**

Assistant County Tax Collector



# Obdulia "Lulis" Lopez

## Objective

Over 29 years of government experience, looking to obtain the Treasurer-Tax Collector position to fully utilize my training and skills, while making a significant contribution to the success of the county and its constituents. I am committed to fulfill the obligations of the office, which is to bill, collect, invest, borrow, and safeguard and disburse monies and properties.

## Education

Fresno Pacific University, Fresno, CA

November 2007, Bachelor of Arts: Business Management

College of Sequoias, Visalia, CA

May 1994, Associate of Arts: Business/Accounting

## Experience

Contra Costa County -Treasurer-Tax Collector | 625 Court St Room 100, Martinez, CA 94553

Assistant County Tax Collector – October 2016 – current

Manage the billing and collections of over 380k property taxes and special levies for cities, school district, special district, and county government with an overall collection rate of 99.14%, 45k unsecured tax bills with collection rate of 96%, Supplemental bills, over 5k business license, Cannabis and Transient Occupancy Tax. Oversight of the Public Tax Auction. Oversight of department HR. Prepare and monitor Tax Unit budget. Member of Bankruptcy and Tax Manual Committee. In the absence of TTC, attend the CCCERA Retirement Board meeting.

Tulare County – County Administrative Office – General Services

Fiscal Manager – August 2010 – October 2016

Responsible for Business Office that include Budgets, payroll, Human Resources, Accounts Payable/Receivable. Plan, assign, schedule, monitor and evaluate task to staff based on department needs. Prepared the departmental budget of General Fund and Internal Service Funds, submissions and payment reports and implement the plan to meet department goal and objectives. Worked closely with managers to review Internal Service Fund and General Fund Budget, Personnel issues, and Resolution. Work with County IT Client Specialist to meet department goals and special needs. Prepared Year End report for Auditor's reporting for ACFR and COWCAP information. Oversight of Capital Projects Fiscal responsibilities.

Obdulia "Lulis" Lopez

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Tulare County|- Health and Human Services Agency (HHSA)

Administrative Services Officer II March 2008- August 2010

Oversight of over 50+ employees in Accounts Receivables for Health, Human Services and Mental Health. Responsible for the billing of Health, Mental Health and over Human Services issuance of cash/food stamps and various financial classes. Prepare budget and forecast bi-annual budget. Make changes to procedures based on State regulations. Monitor Petty cash in County clinics and perform quarterly cash audits for all HHSA clinics and Human Services Offices.

Tulare County – Health and Human Services Agency

Accountant III – December 2005- March 2008

Oversight to Accountant I and II to assign, schedule, monitor and evaluate. Responsible for Agency reconciliation and disbursement of trust funds, realignment report, accruals, reconciliation of monthly revenue and expense reports, Statement of fees, Mental Health Service Act funding reporting, AB8 reporting, Grant Accounting for various Federal and State Grants with a budget of 20k to 3 million and prepare the Single Audit Reporting. Work with outside Auditor's to gather all the data for the annual audit. Work with Internal Auditors to provide the data for the Comprehensive Annual Financial reporting for the agency.

Tulare County – Health and Human Services Agency

Accountant II – November 2002 – December 2005

Responsible for monthly reconciliation of Agency revenue and expense, trust funds reconciliation, monitor all HHSA accruals, statement of fees and quarterly reporting of agency's realignment. Review internal services funds charges for HHSA that included over 100 agency units, grant invoicing for Mental Health and Health Programs. Monitor the 300 million agency budget. Work with outside Auditor's to during the transition of Agency director. Set up new bank accounts with banking institute for various programs. Annually review trust funds for compliance with Welfare and Institution Codes.

Tulare County – Health and Human Services Agency

Accountant I – November 2001- November 2002

Redistribute general services cost to each agency unit, statement of fees, responsible for agency cost allocation disbursement to each HHSA program, State and federal grant invoicing for various Health, Mental Health, and Human Services programs with a budget of over 50k. Bank reconciliation of various agency bank accounts.

Tulare County – Treasurer – Tax Collector Office

County Financial Technician II - December 1997 – October 2001

Responsible for daily deposits of cash/checks, trust funds, payment vouchers, returned checks, tax sale and business licenses. Prepare journal vouchers. Translator for the Tax and Assessor's Office. Process all shortages/overages tax bill payments. Liaison to State Controller's office.

Obdulia "Lulis" Lopez

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Tulare County – Department of Child Support Services

Senior Account Clerk – August 1997 – December 1997

Set up new accounts for non-custodial parent based on court order, file liens, weekly balancing, bank reconciliation, balance suspense accounts, monthly time study for each task to invoice state, monthly state reports, take cash/check payments in the office. Skip tracing to find non-custodial parent utilizing various private, State, and Federal systems.

Tulare County – Treasurer- Tax Collector Office

Account Clerk - March 1995 – August 1997

Customer Service for front counter and phones. Handle all phone messages and return calls, keep the phone system updated with recording of Spanish and English messages. Only Spanish translator for office and at times helped the Auditor's and Assessor's Office with Spanish speaker customers. Process overage and shortage payments for all tax payments. Assist with Tax Sale and development and implementation of a new tax sale system.

## Skills

- Bilingual – Spanish- read, speak, write.

## Credentials

- Credentialed California County Senior Executive, California State Association of Counties - 2017
- International Public Management Association of Human Resources (IPMA-HR) Certification - 2015-current
- State Association of County Retirement Systems (SACRS) Public Pension Investment Management Program – UC Berkeley Hass School of Business Executive Education – 2023
- California Association of Public Retirement Systems (CALAPRS) Principle of Pension Governance - 2023

## Committee

- Bankruptcy Committee member – 2021- current
- Tax Manual Committee member – 2018- current

## References

Mary Lindsay – Retired Assistant County Administrative Officer Tulare County

Linda McCauley – Chief Accounting Officer – College of Sequoias

Kyria Martinez – County Administrative Officer - Kings County

Brice Bins – Retired Chief Deputy Treasurer-Tax Collector – Contra Costa County

November 16, 2023

Board of Supervisors of  
Contra Costa County  
1025 Escobar Street  
Martinez, CA 94553

To Whom It May Concern:

It is a privilege to recommend Lulis Lopez for the Contra Costa County Treasurer – Tax Collector position. As the former Assistant County Administrative Officer for Tulare County, I had the opportunity to work with Lulis for almost two years as her supervisor. In Tulare County, the General Services operations consisted of Administration, Capital Projects, Facilities, Custodial Services, Fleet Services, Parks and Grounds, Property Management and Mail/Copier/Print/Courier services. Lulis was one of eight managers in the General Services department under the guidance of the County Administrative Office.

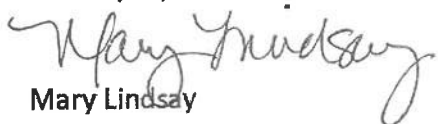
What consistently impressed me with Lulis was her willingness to accept responsibility and her willingness to learn. Lulis was always the first to ask, "How can I help you?" when the department was faced with a challenge. Her in depth knowledge of the financial aspects of General Services and familiarity with departmental budgets, internal service funds and the general fund allowed her to provide workable and relevant solutions. As a result of her proficiency, the high regard with which she was held in, and her problem-solving abilities, she was promoted from an Administrative Services Officer II to Fiscal Manager.

Lulis is a genuinely attentive person. She kept her finger on the pulse on the departmental operations, and as a result was fully trusted by her fellow managers and myself particularly for her discretion in assisting with fiscal issues and sensitive departmental matters. She works incredibly hard and is unassuming. During the time I worked with Lulis she demonstrated strong ethical values, honesty, integrity and an open communication style that helped us, as a department, to improve our services.

Thank you for considering Lulis for the Treasurer-Tax Collector position with Contra Costa County. I am confident she will provide exemplary services and will rise to the challenge of this new role.

You may contact me directly at [REDACTED] should you have any questions.

Thank you,

  
Mary Lindsay