



OUTAGAMIE COUNTY EXECUTIVE
Thomas M. Nelson
320 South Walnut St.
Appleton, WI 54911
920.832.1684
thomas.nelson@outagamie.org

August 22 2023

To the Honorable Outagamie County Board of Supervisors

Ladies & Gentlemen:

It is with great pleasure that I nominate Alison Bong for appointment as Finance Director.

Alison Bong comes to us from the city of Blaine, Minnesota, and has an impressive resume of talents, skills, and extensive experience in fiscal responsibility. I am certain of her ability to achieving financial success for the organization.

Please find supporting documents enclosed for your reference. Your support in confirming this appointment is appreciated. Thank you.

Sincerely,

Thomas Nelson

cc: Alison Bong

Outagamie County Application for Executive Appointment

Name: Alison Bong

Address: [REDACTED]

Home Phone: N/A Work Phone (Professional): [REDACTED] Cell Phone (Private): [REDACTED]

E-Mail Address: [REDACTED]

Would you like agendas and minutes emailed to you? Yes

Do you want your email address given to the general public? No

Present Employer/Position:

City of Blaine, Minnesota; Acting Finance Director

Previous Employer/Position:

Hennepin County, Minnesota; Transportation Capital Program Finance Manager

Educational Background:

Bachelor of Science Economics, University of Minnesota

Bachelor of Science Accounting, Bethel University

Present and Previous Public Service Involvement:

City and County local government agency non-appointed staff position

Comments:

N/A

Signature: _____

Alison Bong

Date Submitted: _____

July 20, 2023

OUTAGAMIE COUNTY DISCLOSURE
IN COMPLIANCE WITH RESOLUTION 46—1974 AND ORDINANCE C-2010-11
AND CHAPTER 2, SECTION 2-424 – 2-426 OF THE OUTAGAMIE COUNTY
CODE OF ORDINANCES

The purpose of this Disclosure Statement is to make full disclosure of all potential or actual conflicts of interest. Conflicts of interest occur when the personal interests, financial or otherwise, of a person actually or potentially interfere with the person's professional obligations to and/or the best interests of Outagamie County.

NAME (LAST) (FIRST) (MIDDLE) DAYTIME TELEPHONE NUMBER Bong, Alison Claire [REDACTED]
MAILING ADDRESS STREET CITY STATE ZIP CODE [REDACTED]

POSITION OR CAPACITY WITH OUTAGAMIE COUNTY (now held or seeking): Finance Director

PRINCIPAL EMPLOYER(S) NAME City of Blaine, MN - Present through September 8, 2023 County of Outagamie, WI - Pending appointment August 8, 2023
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ADDRESS 10801 Town Square Drive, Blaine MN 55449 320 South Walnut Street, Appleton WI 54911

SOURCE OF INCOME IN EXCESS OF \$1,200 PER YEAR (List all sources or anticipated in excess of \$1,200/year). List any interest in any business, contract, lease or item of value, the nature and extent of such interest, holding or employment which may involve a conflict of interest or potential conflict or ethics problem in conducting county business. <u>N/A</u>
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I, Alison Claire Bong, currently serving or will be serving Outagamie County in the capacity of Finance Director, certify that I anticipate no income from any other source to be in conflict with the county ethics code nor do I have any holdings not disclosed which would be in conflict or a potential conflict of interest or violation of the Outagamie County Code of Ordinances, Chapter 2, Section 2-424 – Section 2-426, Resolution 46—1974 and Ordinance C-2010-11.


Signature

Subscribed and sworn to before me this 20 day of July, 2023.

Notary Public Seal Commission Expires:

 LEE GORDON MACKLEM Notary Public State of Minnesota My Commission Expires January 31, 2028



Work Experience

City of Blaine, Finance (October 2021 – Present)

Deputy Finance Director

- Serve as the Assistant City Manager/Finance Director's second-in-command by overseeing the City of Blaine's finance program including an all-funds annual budget of \$75 million in operating and \$45 million in capital appropriations.
- Direct and oversee the work of 10 staff members through four supervisors and program coordinators, to provide city-wide services for the following programs: treasury, financing and debt management, accounting, accounts payable and receivable, utility billing, budget, risk management, procurement. Core activities include the accurate and timely recording of financial transactions, annual audit and annual financial comprehensive report, budget planning and management, cash management, establishing user fees, property tax levy and evaluating financing, annual insurance renewal risk management priorities, and regular analysis of financial performance for all funds and programs. Previously oversaw a unit of three responsible for geospatial information systems, business intelligence, and data warehousing.
- Collaborate with the City Manager and the Assistant City Manager/Finance Director to create a transition plan for the upcoming retirement of the incumbent Finance Director. Strategically develop succession plans by aligning critical functions and programs with talent. Coach and mentor staff through individual development plans, creating bench strength to allow flexibility and agility for growth opportunities from upcoming vacancies.
- Provide strategic guidance and leadership for core financial programs including policies surrounding fund balance, program levels of service, debt, property tax levies and user rates as well as long-range plans for staffing, capital asset preservation, and financing by aligning departments and finance staff with the direction of the City Manager and Council.
- Present all Finance Department workshop and council items to the City Council including year-end audit results, budget planning, and Truth-In-Taxation.
- Liaise with departments and Blaine's municipal advisor to set policy, evaluate funding eligibility, and guide staff regarding funding sources which include Tax Increment Financing (TIF), federal grants such as regional solicitation, Community Development Block Grants (CDBG), American Rescue Plan Act (ARPA), and state programs such as Municipal State Aid Streets (MSAS) and Local Road Improvement Program (LRIP).
- Establish and maintain policies, processes, and procedures for finance and technology programs including the Purchasing Policy, finance manual, procurement program, IT governance, systems integration, and data management.
- Provide guidance to staff and cross-functional departments regarding rules and regulation from state statute, ordinance, generally accepted accounting principles (GAAP), government accounting standards board (GASB) rules, internal controls and policy, to ensure compliant, effective, and sound financial business practices.
- Promote innovative problem-solving within finance by empowering staff to lead projects to implement new systems, decommission old systems and processes, improve cross-functional processes, and eliminate waste. Projects include the implementation of electronic timecards; Invoice Cloud, an upgraded utility billing platform; an organics recycling program; Questica, a new budget platform; Open Book, a new transparency platform; Clear Gov, a new digital budget book platform; a city-wide procurement process improvement project; establishing the city's first Capital Improvement Program (CIP); a utility rate study; and shifting from a GIS focused program to a data services model.

Hennepin County Public Works, Transportation Project Delivery (2016 – 2021)

Transportation Capital Program Finance Manager | April 2020 – October 2021

- Oversaw Hennepin County's Transportation Capital Funds; a portfolio of projects with \$1.3 billion in board appropriated budget. Implemented policies, processes, and procedures to ensure fund integrity, including establishing the fund's cash balance strategy. Established and maintained business practices across multiple departments to process capital project financial transactions accurately and efficiently.
- Acted as primary liaison for Transportation's capital financial initiatives and project financials for internal departments and external agencies including the county's Office of Budget and Finance and MnDOT related to project financials.

- Oversaw report development to guide internal policy decisions and provided key business metrics: project cash and receivables; aggregate project reporting by revenue type; and aggregate parent project summaries.
- Oversaw a continuous improvement initiative to automate data connections across multiple key financial systems, including cross-institution databases. Systems include PeopleSoft, Cognos, Azure, Power BI, and Crystal Reports.
- Oversaw staff resources that assisted in the creation of the Transportation 5-year CIP and long-range capital plan.
- Oversaw cradle-to-grave financial life cycle of complex state aid and federal aid programs including Turnback, Highway Safety Improvement Program (HSIP), and Regional Solicitation.
- Resolved State Aid Regular account overprogramming via historical project reconciliation and closeout, maximizing use of external funds, and setting policy to guide staff in day-to-day decision making.
- Lead the reconciliation of a \$147 million jurisdictional transfer program capturing \$25 million in external revenues.
- Led the automation of several executive and staff level financial reports saving over 500 staff hours annually.

Capital Budget Coordination and Policy Supervisor | February 2019 – April 2020

- Co-led the development and implementation of a new capital program prioritization process for Transportation.
- Managed a work unit responsible for coordinating Public Works' capital budget, generating ad hoc reports, researching rules and regulations, and documenting key policies, processes, and procedures.
- Responded to special requests from the Hennepin County Board of Directors and Public Works' executive leadership which included research, recommendations, and report creation to aid internal and external policy decisions.
- Coordinated the Public Works' capital budget, a \$330 million 5-year capital improvement program. Liaised with internal and external partners, including cross-functional departments within Public Works, the Office of Budget and Finance, and with external partners including MnDOT, local businesses, and local municipalities.
- Mentored, coached, and developed staff within the line of business and across the county. Assisted staff through the promotion evaluation processes.

Policy and Data Analytics Supervisor | January 2018 – February 2019

- Researched Public Works Transportation capital project closeout for Public Works' executive leadership and the board. Drafted policy recommendations for the board which were adopted, ultimately reducing county audit risk.

Continuous Improvement Lead | January 2016 – January 2018

- Served as Hennepin County's lead to develop and pass ordinance and permit language pertaining to new small cell transmitter legislation in coordination with the metropolitan area cities and counties, the Transportation Permits Office, and the County Attorney's Office to produce ordinance language that was passed by the county board.

Hennepin Health Plan, Formerly Metropolitan Health Plan (MHP) (2013 – 2016)

Business and Compliance Analyst

- Researched regulatory and contractual guidelines to develop and maintain internal policies including the creation and maintenance of a full policy repository.

Education, Awards, and Community Engagement

Bethel University (Summer 2019) | Bachelor of Science in Accounting

University of St Thomas (Fall 2015) | Certified Professional Project Manager Program, CPPM

University of Minnesota (Fall 2012) | Bachelor of Science in Economics, Mathematics Minor

Minnesota St. Paul Business Journal (2021) | Women in Business Honoree

Cristo Rey High School | Hennepin County liaison for corporate work study program for underrepresented students

Step Up Level 2 | Supervisor and mentor for underrepresented students



HUMAN RESOURCES DEPARTMENT
320 SOUTH WALNUT STREET, APPLETON WI 54911
PHONE (920) 832-1668 FAX (920) 832-1534

7/11/2023

Alison Bong
Finance Director Offer Letter

Dear Alison,

Congratulations on your selection for the Finance Director position at Outagamie County. We are pleased to have you joining our team at the County and hope you are equally excited about this opportunity. Please review ALL of the following:

This job is contingent upon successful completion of the following marked items:

- BACKGROUND CHECK
- BOARD OF SUPERVIORS APPROVAL OF COUNTY EXECUTIVE APPOINTMENT

- **WAGE:** We are pleased to offer you an annual salary of \$137,987 (2023 base pay). Within our 2023 Exempt Compensation Wage Schedule you will be Grade 20, Step 10. Direct Deposit of employee payroll is required for all new employees. The account may be at any financial institution in the United States.
 - Also, as part of our 2023 budget, there will be a \$1000 recruitment/retention payment made to eligible employees active on the payroll as of December 1, 2023.

- **VACATION:** Three weeks upon hire, with additional weeks determined by the normal vacation schedule outlined in the Employee Handbook. You are also able to earn additional compensatory time for hours worked over 45 in workweek.

- **HIRE DATE:** *Begin full time capacity with Outagamie County as of* Monday, September 11, 2023, pending appointment confirmation by the Board of Supervisors at the August 8, 2023 meeting. *Alison may begin a part-time up to 24 hrs/wk*

- *phased start beginning August 16, 2023, on an off payroll cycle*
- **ORIENTATION INFORMATION:** Please report on your first day at 7:30 AM. You will attend new hire

orientation from 8:00 AM until 11:00 AM,

↳ full orientation to be determined

- Please plan to arrive early.
- Parking is available in the large lot in front of the County Administration building.
- All visitors must enter through the secured entrance and proceed through security so please allow extra time. Follow the signs to New Hire Orientation in the County Administration Building.

Documentation that establishes both your identity and your eligibility to work in the United States in order to complete the required I-9 Form are attached to the offer. Please see the attached document.

*Amended
1/20/23
CB*

*****Before orientation, please meet Anne Van in the lobby at the public entrance at 7:30 AM. Anne will escort you to the department and the meeting room.**

- **BENEFITS:** You are Full-Time Benefit Eligible
 - Benefits that may be available are: Health, Dental, Vision, and Retirement. Employee may be eligible for other benefits. Health, Dental, Vision starts the 1st of the month following 30 days of employment.
- **ONBOARDING:** Following your confirmed appointment by the Board of Supervisors, you will receive an email invite to our Onboarding Platform to assist you in completing the required pre-employment documents electronically. **These documents must be completed by the week before your start date** through the NEOGOV Onboarding website or your start date may be delayed. Please begin working on this as soon as possible.

Pursuant to Wisconsin Law, Employees that will be working 1200 hours annually or more will be considered a participating employee for the Wisconsin Retirement System. This will become effective immediately upon hire. The 2023 Employee required pre-tax contribution rate is 6.8% per paycheck.

Your employment with Outagamie County is at will. This means your employment is for an indefinite period of time and it is subject to termination by you or Outagamie County with or without cause, with or without notice, and at any time. Nothing in this policy or any other policy of Outagamie County shall be interpreted to be in conflict with or to eliminate or modify in any way, the at-will employment status of Outagamie County employees.

I have read and accept the above offer. I agree and understand that I have been provided a copy of the Outagamie County Employee Handbook. It is my responsibility to review the handbook and adhere to the policies and procedures of Outagamie County.

Please sign and return a copy of this offer letter to Anne Van at [REDACTED] by no later than end of day on Monday July 24, 2023 so we can continue the process of appointment accordingly.

I hope that your employment with us will be a long and rewarding one that will be of mutual benefit to both you and Outagamie County.


Alison Bong

7/17/2023
Date

Amended 7/20/2023 OB

Sincerely,



Thomas Nelson
Outagamie County Executive

Enclosures: Neogov Onboarding Tips
Handbook
1-9 Acceptable Documents
2023 Benefits (documents)