

Resume for Jesse Takahashi

Summary of Qualifications

- Former CPA with 23 years of local government experience in: budgeting, accounting, investments, debt financing; participating in two successful ballot measures raising sales tax, TOT and business license tax revenues; negotiating and reviewing contracts and agreements; coordinating user fee studies; developing corrective budget strategies during last two economic recessions; preparing fiscal analyses for parcel annexations from County and negotiating a 40-year compensation agreement with the City of San Jose

PROFESSIONAL EXPERIENCE

City of Mountain View

2019-present

Finance and Administrative Services Director

Responsible for the operations of the Finance and Administrative Services Department including budgeting, accounting, investments and debt, purchasing, document processing, copy center and risk management.

City of Campbell

1997-2018

Finance Director (2006 – 2018)

Advised the City Manager and Executive Team on matters of fiscal importance including financial and budgetary operations and reporting and risk management. Lead development of the annual operating budget, mid-year update and multi-year budgetary projections, including the forecasting and ongoing monitoring of major general revenues. Made presentations to City Council on budget adoption, financial statements and other matters as needed. Provided support and direction to City departments in implementing and interpreting City policy and reviewing operational matters affecting the City's fiscal health. Reviewed and recommended changes to policies and procedures, maintained effective internal control processes to ensure the integrity and accuracy of the City's financial data. Directed the investment of City reserves and management of City debt including continuing disclosure and refinancing opportunities. Served as Oversight Board member and Staff for RDA dissolution process and Successor Agency in final disposition of remaining assets. Served as Executive Committee member for 28-member risk sharing pool (PLAN JPA). Coordinated general liability, property and auto claims and litigation matters.

Accounting Manager (1997 – 2006)

Responsible for daily operations of the Finance Department (included general ledger, purchasing and disbursements, revenue and receivables, payroll, business licenses and fixed assets). Managed financial and compliance audits. Prepared award-winning CAFR for excellence in financial reporting. Had primary responsibility for managing the investment portfolio, establishing broker relationships, making investment purchases, reviewing and recommending changes to the annual investment policy and strategy. Assisted in preparation of the annual operating budget and revenue projections. Assisted Redevelopment Agency in administering fiscal requirements and provided financial and budgetary support.

Participated in issuing RDA Tax Allocation Bonds for construction of a downtown parking structure. Coordinated arbitrage compliance work for outstanding debt issues. Ensured debt service payments were made timely and accurately. Member of the Capital Improvement Project (CIP) Committee, responsible for evaluating and making recommendations on capital project submittals, the Finance Sub-Committee, that approved investment policy, risk management litigation, and auditor selection and the Housing and Community Development Loan Committee that reviewed and approved requests for low-mod income housing rehabilitation loans.

City of Cupertino

1995 – 1997

Accountant

Prepared GFOA award-winning CAFR and coordinated annual financial and compliance audits. Prepared State and federal compliance reports including State Controller's report, sales & use tax returns, street report, and grant reports. Performed monthly general ledger review and analysis; prepared adjusting journal entries and provided assistance to other departments in analyzing monthly management reports. Prepared 5-year operating revenue and expenditure projections; and assisted Public Works Department in preparation of Capital Improvement budget. Participated in department budget presentation meetings with Administrative Services Director and City Manager in which program budgets were either approved or modified. Acted as liaison to department heads during budget preparation process, and throughout the year, assisting them in the management of City resources and achievement of objectives. Responsible for accounts payable, accounts receivable, payroll, utility billing and collections.

KPMG Peat Marwick LLP

1988 – 1995

Audit Manager (1993 – 1995)

Managed audit teams for multiple engagements. Prepared and reviewed comprehensive annual financial reports (CAFR) for public agencies; reviewed internal control systems including computer aspects and made written recommendations for improvement to management focusing on operational efficiencies. Researched technical accounting and reporting issues and proposed alternatives; also instructed firm technical training courses. Maintained client relationships, negotiated audit and other engagement fees, and resolved issues in a timely manner. Responsible for practice development including identification of prospective clients, assembling and submitting proposals and making oral presentations. Served as a college campus recruiter, identifying, interviewing and making hiring recommendations on prospective graduates for employment with the firm.

Audit Supervisor (1990 – 1993)

Assisted in planning audit engagements; supervised and reviewed audit field work and prepared work papers on more technical aspects of audit; focused on developing good client relationships; prepared client management letters emphasizing internal controls and areas for performance improvement. Supervised up to six auditors.

Staff Accountant (1988 – 1990)

Performed audits for a variety of for-profit and governmental organizations; focused on developing audit skills and technical abilities.

Education and Certification

- B.S., Business Administration--Accounting and Personnel Administration, California State University, Hayward, CA
- Certified Public Accountant (1992-2008).

Professional Affiliations

- ***California Society of Municipal Finance Officers***—President (2015), Chair, Vice Chair and Senior Advisor of various committees—Administration, Career Development, Professional & Technical Standards, Technology (2000-2018).
- ***Government Finance Officers Association of the United States and Canada***
- ***California Municipal Treasurers Association***