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Current line of work: Chief Deputy Auditor-Controller

Please give a brief summary of your background and qualifications for the office of County Auditor-Controller.

Alameda County has a budget of \$3.0B and employs over 9,000 people. I am currently the Chief Deputy Auditor Controller for Alameda County and prior to that I was the Assistant Controller. I have worked within the executive financial management team at Alameda County for over 15 years. I have a Master's degree in Public Administration, a Master's degree in Social Work and a Bachelor's degree in Psychology. Alameda County recently received the "AAA" credit rating from all three credit rating agencies – only 1 of 2 counties in California to achieve that distinction. All three rating agencies cited the County's strong management team and adherence to sound financial management policies and commitments. I am incredibly proud to be a member of the team that worked tirelessly to achieve this accomplishment. A credit rating of "AAA" allows Alameda County to borrow money at lower interest rates, saving the County money that can be utilized to provide much needed safety net services to its neediest citizens.

Additionally, I am responsible for directly managing all operations and staff of the Auditor-Controller/Clerk-Recorder Agency, which includes implementing and maintaining County-wide financial, payroll, internal control and compliance systems to ensure accurate financial record keeping; disbursement of County-related payments; management of payroll and related compensation and benefits; development of risk assessments and audit plans; County financial reporting to County, State and federal authorities; specialized accounting services for joint powers authorities; property tax levy and apportionment; the recordation and preservation of all Official Public Records; the processing of marriage licenses, fictitious business names and notary oaths; and collection of accounts related to victim restitution, fines, penalties and over payments.

Why are you running? What do you believe are the main priorities for the office of the County Auditor?

I am running for this position because I am the most qualified person. I have been with the Auditor-Controller Agency for the past 15 years and I truly love my work, the people and Alameda County. I have hired every employee over the past 10 years and I am proud of all that we have accomplished especially as it pertains to sustainability and improving customer service and efficiencies. The responsibilities of this office have impacts to the safety net services provided to all members of our community. It is not work that you can learn as you go – it takes

years to understand the intricacies of each County department's financial structure; the laws/regulations surrounding financial transactions and reporting; and the relationships needed to maximize and leverage every dollar available to meet the needs of our children, families, elderly, immigrants, women, veterans and the environment. Alameda County has an incredible reputation for being a leader in addressing social issues and meeting the challenges faced through climate change and I have been a key partner in this process.

The main priorities of this office are to ensure that through prudent fiscal stewardship and the highest level of accountability and transparency that all County resources are spent, audited and reported based on the expectations of the citizens of Alameda County and in accordance with the law.

Where will you get (have you already received) the money to run your campaign? Describe sources of financial contributions for your campaign that you would refuse to accept (if any)?

Most of my funding to date has come from personal savings. I have several fund raisers scheduled over the next few months. I would not take funding from organizations that deny climate change; support tobacco; are committed to the pro-life agenda; or any organization that does not support the rights of all citizens regardless of gender, sexual orientation, race or national origin.

How will you ensure community development through budget allocations maintains proportional to city (county) growth?

I am a proud supporter of Measure A1 which provides \$580M to Alameda County for affordable housing. I was on the team that developed the ballot initiative, the tax rates, the bond documents and I will be responsible for oversight in partnership with the Community Development Agency. I was also a supporter of Measure A and Measure AA which ensures quality health care to all of Alameda County. In these Measures, as well as other County initiatives, the County departments engage in ongoing discussions with the community members to ensure that their voices are incorporated into program and service development. Also, the County's diligent efforts to achieve the best credit ratings ensures that Alameda County will be able to borrow money for its critical services at the lowest possible rates. Alameda County continues to focus all of its efforts on maximizing resources so that as needs arise, i.e., our increasing homeless populations we are prepared to work with the community to address them.

How would you improve bookkeeping methods for county offices? What best practice do you believe will improve Alameda County?

Currently the County uses the PeopleSoft Financials system for all of its financial transactions and complies with all generally accepted accounting practices and legal requirements. Alameda County has won the Certificate of Achievement for Excellence in Financial Reporting from the Government Finance Officers Association for over 30 years. In order to be awarded the Certificate of Achievement, the County must publish an easily readable and efficiently organized Comprehensive Annual Financial Report that exceeds the minimum requirements of transparency. Also, our most recent Single Audit – an audit of federal fund expenditures – had zero findings – this is an incredible example of excellence in accounting for financial transactions. I am part of the team that reviews and implements upgrades to our financial system. We work as a team with our Information Technology Department to carefully study and plan upgrades to our system. Members of our team have been asked to speak at Oracle events due to our meticulous and successful advancement of the enhancements within PeopleSoft. PeopleSoft has worked very well within our County to ensure that all financial transactions are accurate and comply with County and Governmental Accounting Standards Board policies, procedures and requirements. However, I do not think it is easy to generate useful reports from the system. I would improve access to the financial information in the system by utilizing a more user-friendly front-end report writer. It currently requires an employee to write or run a query in which the right information from the right table may not be produced. This could lead to errors in decision making if the wrong data is used. I would like to conduct a survey to determine the information most requested and continue to develop easy to use queries, trainings on the underlying tables within the system and the use of a reporting system that would upload the data into easily readable and useful reports. This would ensure that all staff are receiving accurate, consistent information when making critical decisions.

Will you maintain an environmentally and socially conscious responsibility towards public spending allocations and how will you hold offices accountable with their spending?

I am an avid supporter of and work very closely with the Alameda County Sustainability Program and staff. My main objective at the Auditor Agency is to ensure that we are working smarter and not harder through the use of technology and sustainability advancements. Our Agency has been a leader in reducing thousands of pages of paper every day due to our dedication to modernizing our current systems; automating work flow processes; utilizing DocuSign; reducing travel and congestion; and constantly re-examining how we work. Some of our accomplishments include:

Elimination of over 100,000 pieces of paper; reduction of hundreds of hours of manual input; and increased turnaround time of refunds and response to the public due to our Property Tax Modernization system.

Opening of a Clerk Recorder's Office in Dublin in which we have had almost 25,000 customers in the Dublin Office since it opened in 2015; reducing traffic congestion because now people can receive services closer to their home rather than driving into Oakland.

Implementation of DocuSign for workflow – eliminated thousands of sheets of paper and increased the time in which payments are processed as staff can access and approve payments on-line and remotely.

Clipper Cards & Pool Vehicles – The Auditor Agency was instrumental in the implementation of a Clipper Card program for all County employees. Employees are encouraged to use sustainable transportation to meetings through use of Clipper Cards for mass transit, the use of sustainable County pool vehicles or bicycles. Our staff wrote the policies for the Clipper Card program and provides ongoing support County-wide.

Revolving Funds for Sustainability Projects – The County Sustainability staff and I met and are working on reviewing best practices on how to manage and use savings generated by sustainable projects/programs so that the savings can be reinvested in other projects as proposed by staff and the community.

Clerk Recorder System upgrade – we are moving towards the upgrade of our Clerk Recorder’s system which will allow for e-Recording of documents and would significantly reduce the need for customers to come into the office, and drastically reduce paper use and storage.

At the Auditor-Controller Agency we are the final approvers for all of the County’ \$3.0B in payments per year. My Agency develops, implements and enforces all the County’s Manual of Accounting Policies and Procedures (MAPP). We review every transaction and if it is not in compliance with our policies, it is rejected. Departments must provide additional support or go to the Board of Supervisors for approval. My staff also conducts departmental trainings to explain our MAPP and promote open dialogue with our financial liaisons. Our role as County fiscal steward is clearly communicated to departments – which often makes us very unpopular. We are committed to ensuring that every taxpayer dollar is spent, audited and reported in compliance with public expectation and the law.

Concretely and specifically, how will you make yourself available to those who elect you? As County Auditor-Controller, what programs will you implement to promote good practices, citizen oversight and public input towards discretionary spending and other budgetary matters?

I am always available to the public; I truly love meeting with the communities throughout Alameda County. I think it’s extremely important that my office staff are representative of those in the community we serve. My staff is 75% women and 85% minority represented. I am willing to go out and speak to any group or organization who wants to learn more about Alameda County. I have recently been out to the Unity Council in Fruitvale to speak about our Agency and internship opportunities, and to a Veteran’s Association to talk about the responsibilities of Alameda County. Throughout the budget development and approval process, Alameda County holds numerous public meetings to engage the community in discussions regarding our challenges and priorities. I attend these meetings and will continue to promote them throughout the community. Currently, we have our most significant financial audits available on-line and all audits are available to the public. However, I will move toward publishing our audits on-line so that they are directly accessible to the public. I have also been

researching best practices for reporting fraud, waste & abuse and plan to implement a process within Alameda County when I am elected.

Are you willing to disclose major financial donors to your campaign? Do you support public campaign finance reform? What sources of financial contributions for your campaign that you would refuse to accept (if any)?

Yes, I will disclose any and all financial donors to my campaign and I do strongly support public campaign finance reform. As stated above, I would not take funding from organizations that deny climate change; support tobacco; are committed to the pro-life agenda; or any organization that does not support the rights of all citizens regardless of gender, sexual orientation, race or national origin.

What endorsements have you received thus far?

Steve Manning, *Auditor-Controller*, Alameda County
Patrick O'Connell, *Retired Auditor-Controller/Clerk-Recorder*, Alameda County
Wilma Chan, *President, Board of Supervisors, District 3*, Alameda County
Scott Haggerty, *Board of Supervisors, District 1*, Alameda County
Gregory Ahern, *Sheriff/Coroner*, Alameda County
Deputy Sheriffs' Association of Alameda County (DSA)
Ron Thomsen, *Assessor*, Alameda County
Robert Campbell, *Auditor-Controller*, Contra Costa County
Michael Miller, *Auditor-Controller*, Monterey County
Juan Raigoza, *Controller*, San Mateo County
Tracy Schulze, *Auditor-Controller*, Napa County

What is your political affiliation and how will your political views affect your ability to serve?

I'm a Democrat and I will bring the values that all people's rights are equal and that those in public office derive their rights from the people who elect them. That is why I think it is critical to hire employees within my agency that represent the communities we are elected to serve. I want our community to see themselves when they come into our office seeking services; and to feel free to express their opinions and suggestions. Diversity of staff results in truly ensuring that we are inclusive of those we represent.