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**JACKSONVILLE POLICE AND FIRE PENSION FUND  
BOARD OF TRUSTEES PERSONNEL COMMITTEE  
MEETING AGENDA – OCTOBER 9, 2017 – 2:00PM  
RICHARD “DICK” COHEE BOARD ROOM**

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**PRESENT**

Richard Patsy, Board Secretary  
Lt. Chris Brown, Trustee

**STAFF**

Timothy H. Johnson, Executive Director – Plan Administrator  
Steve Lundy, Assistant Plan Administrator

**GUESTS**

Kevin B. Grant

**I. CALL TO ORDER**

**II. PERSONNEL COMMITTEE**

**1. FINANCE MANAGER**

1. Job Description

**2. KEVIN GRANT**

1. Resume

2. Application

3. Letter from Candidate

4. Summary of References

**3. CANDIDATE EVALUATIONS**

**III. PERFORMANCE MANAGEMENT SYSTEM DRAFT**

*Timothy Johnson – Handout*

**IV. ADJOURNMENT**

**NOTES:**

Any person requiring a special accommodation to participate in the meeting because of disability shall contact Steve Lundy, Assistant Plan Administrator at (904) 255-7373, at least five business days in advance of the meeting to make appropriate arrangements.

If any person decides to appeal any decision made with respect to any matter considered at this public meeting such person will need a record of proceedings, and for such purpose such person may need to ensure that a verbatim record of the proceedings is made at their own expense and that such record includes the testimony and evidence on which the appeal is based. The public meeting may be continued to a date, time, and place to be specified on the record at the meeting.

Additional items may be added / changed prior to meeting.

SL





## POLICE & FIRE PENSION FINANCE MANAGER

Class Code:  
04805

Bargaining Unit: Appointed Employees - Police Fire Pension

CITY OF JACKSONVILLE  
Established Date: Jan 23, 2012  
Revision Date: Aug 25, 2017

### **SALARY RANGE**

\$32.03 - \$53.93 Hourly  
\$5,552.50 - \$9,348.60 Monthly  
\$66,630.00 - \$112,183.20 Annually

### **JOB DESCRIPTION:**

The Finance Manager (Controller) reports to the Executive Director-Administrator of the Police & Fire Pension Fund (PFPF) or designee. This position is responsible for the financial affairs of the organization. Responsibilities include the following essential job functions.

### **EXAMPLES OF WORK:**

#### Accounting:

- Maintain a documented system of accounting policies and procedures;
- Review and reconcile of general ledger detail;
- Post month-end closing entries and reconcile trial balances;
- Prepare monthly financial statements;
- Ensure that periodic bank reconciliations are completed;
- Ensure that required employer contributions are made on a timely basis;
- Maintain the chart of accounts;
- Maintain system of control over accounting functions including accounts receivable, accounts payable and payroll.

#### Investment:

- Administer Investment Management Agreements;
- Responsible for all local and custodian bank account transactions.

#### Financial Reporting:

- Recommend benchmarks against which to measure the performance of operations;
- Calculate and issue financial and operating metrics;
- Coordinate the preparation of the actuarial valuation report, annual report, etc.

#### Compliance:

- Coordinate the provision of information to external auditors or accountants;
- Comply with local, state, and federal government reporting requirements and tax filings;
- Balances and reconciles accounts annually and prepares the "Prepared by Client (PBC)" schedules as requested by the outside independent auditor;
- Conducts regular pre-audits over expenditures including payroll to make sure funds are disbursed properly;
- Develop and administer fiscal plans, policies and procedures in compliance with Generally Accepted Accounting Principles, GASB Rules and industry best practices.

#### Budget:

- Manage the production of the annual budget and forecasts;
- Calculate variances from the budget and report significant issues to management.

#### Purchasing:

- Complies with the PFPF Board's public purchasing protocols.

Contract Administration:

- Manage outsourced functions and relationships with outside audit firms, banks, transition manager, casualty/liability insurance agent(s), securities litigation, actuary, investment consultant, money managers, etc.

Property Management:

- Oversees building management such as leases, rent collections, maintenance and repair.
- Provide financial analyses and prepares annual budget, reports, information and monitors operations, building management and capital improvements.

Communicates clear direction, manages for results, and leads organizational change.

Assigns responsibility, takes corrective action, demonstrates leadership in evaluating, developing, and motivating employees.

Assists Executive Director/Plan Administrator in any other duties as assigned.

**KNOWLEDGE, SKILLS AND ABILITIES:**

To perform this job successfully an individual must be able to perform each essential duty satisfactorily. In addition this individual must possess high professional standards and a personal code of ethics characterized by honesty, integrity, openness, and fairness, strong interpersonal, problem-solving and analytical skills, proficiency in computer skills, accounting software, Excel, ability to interpret and appropriately apply accounting principles and regulations, ability to develop and administer fiscal plans, financial systems, policies and procedures, ability and experience in generating timely and accurate financial information and reports, ability and experience developing, implementing and maintaining internal controls to effectively safeguard and manage fiscal resources, ability to communicate financial information to all levels of staff and the public effectively, both verbally and in writing, ability to develop collaborative and strong working relationships with internal and external constituencies as a service-oriented professional and ability to manage time and deliver projects in an environment of competing priorities.

**OPEN REQUIREMENTS/SUPPLEMENTAL INFORMATION:**

Bachelors' Degree from an accredited institution in Accounting, Business Administration, or related field with at least five years financial management experience. CPA or Master's Degree in related field is preferred; government accounting experience is preferred; pension administration experienced is preferred.



# KEVIN B. GRANT

[kevingrant47@gmail.com](mailto:kevingrant47@gmail.com) ■ Jacksonville, Florida ■ (904) 477-7875 Cellular

## PROFESSIONAL EXPERIENCE

### **Independent Consultant – Southeast Region (2016 – Present)**

Provide services as a consultant for businesses and non-profits in the areas of financial structures, operational enhancements, programs and plans redevelopment and continuous follow-up support to achieve strategic goals. Additional roles include onsite management with a review presentation of operational management proposals for enhancements or restructure; grant review for submissions, grant performance analysis and evaluations; contract review and management; response for information and/or proposal review, writing and submissions.

### **Fresh Ministries, Inc. – Jacksonville, Florida (2015 – 2016)**

#### ***Chief Financial Officer & Director of Beaver Street Enterprise Center***

**Chief Financial Officer – Financial:** Served as senior-level leader that provided financial vision and leadership, strategic and tactical planning, development and coordination of all finances. Lead all financial operations, assesses organizational performance against both the annual budget and company's long term strategy, and ensures protection of the organization's assets and integrity of the financial information, and acts as an advisor to the Board of Directors. Oversaw all accounts, ledgers, ensuring compliance with appropriate Generally Accepted Accounting Principles (GAAP), internal control safeguards, regulatory requirements, and Office of Management and Budget (OMB) audit requirements for the annual A-133 audit. Managed cash flows, forecasting, performance and established policies and investment guidelines. Developed tools and review systems necessary to provide critical financial and operational information to senior leadership and made actionable recommendations on both strategy and operations. Engaged the board, executive and audit committees around financial issues, trends, and changes effecting the organization. Develop and utilize forward-looking, predictive models and activity-based financial analyses to provide insight into the organization's operations and business plans. Remained up to date on nonprofit audit best practices and state and federal law regarding nonprofit operations. **Leadership:** Developed a direct report financial team, managing work allocation, training, problem resolution, performance evaluation, and the building of an effective team dynamic. **Operational:** Ran the grants, contracts reviews, requests for proposals and budgets. Consulted as necessary with legal counsel and insurance providers to reduce the risk and liability of company. Engaged ongoing with insurance programs, including health, general liability, workers' compensation, property and automobile insurance. **Director of Beaver Street Enterprise Center (BSEC):** Led all functions of a two facilities business incubator. Sourced and recruited start-up companies with the potential to become successful at BSEC. Prepared, modified and executed the strategic plan of the incubator. Developed and implemented the annual operating plan of the incubator as approved by the board. Provided timely and informed communications to the board relative to the operation of the incubator. Supplied timely and clear services to the clients of the incubator to ensure the maximum chance of business success to client companies. Cultivated advisory teams and mentoring resources. Assisted tenants to develop mutually beneficial, synergistic relationships among themselves. Helped with proposals and with referrals to external and internal sources of necessary support services. Build BSEC's credibility through ongoing management-reporting and public relations activities and ensure sustainability and growth by seeking programmatic funding and other support. Supervise and manage BSEC's professional and clerical staff, including annual performance reviews.

### **City of Jacksonville – Jacksonville, Florida**

#### ***Finance Manager (Operations Administrator)/Energy Grants Project Manager (2010 – 2015)***

Served as financial and operational liaison to the Director of Neighborhoods Department in the day-to-day operations of the department with operational, financial and logistical support to the department which includes annual budget analysis and tracking, budget development, auditing, and in depth process analysis for seven (7) divisions and nine (9) activities. Responsible for managing the processing, reconciliation, and auditing of procurement and accounting functions and ensuring the accurate maintenance of accounts (index and sub-object), purchase orders, blanket order balances, grants, and trust funds, including federal and state funds. Perform general ledger accounting duties, account reconciliation, and funds transfers in accordance with departmental needs. Managed the budget process for the department, including monitoring to ensure goals and objectives are met. Represented the department at various meetings with regards to operational and administrative matters; review revenue reconciliation for the department; developed departmental policies regarding operational functions. Provided ad hoc reporting as necessary.

**City of Jacksonville continued - *Energy Efficiency Grants Project Manager:*** Monitored \$7.8m & \$1.2m Energy Efficiency and Conservation Block Grant operating budget and expenditure of funds, administers funds from various funding sources and initiates requests for adjustments and transfers.

**Wells Fargo Bank, N.A. – Jacksonville, Florida** (2006 – 2010)

**Wachovia Bank, N.A. (Formerly First Union Bank) – Jacksonville, Florida** (1998 – 2003)  
*Vice President/Relationship Manager/Team Leader*

Administered a corporate trust book of issued bonds including corporate, municipal, industrial development; state assisted housing, variable rate issues, custody, and escrows, with a portfolio value of \$3 billion of managed assets. Maintained large revenue accounts while promoting good corporate/municipal client relationships with upper level executive and financial contacts. Oversaw all accounts, ledgers, ensuring compliance with appropriate Generally Accepted Accounting Principles (GAAP), perform general ledger accounting duties, account reconciliation, and funds transfers. Explored new business sales opportunities through interactions with clients, attorneys, financial advisors, brokers, and commercial bankers and promoted other products and services offered by the Bank. Managed invested funds within the trust and escrow accounts to ensure proper transfers, disbursements, and investments pursuant to document guidelines; forecasted cash flows relative to disbursement needs. Served as the Team Leader for up to 10 relationship managers and up to 15 trust associates for the southeast regional office. Responsibilities included recruiting, interviewing, hiring, training, and developing trust team members. Extensively reviewed and commented on legal documents associated with the issuance of new bonds, escrows, and custody accounts.

**City of Jacksonville – Jacksonville, Florida**  
*Senior Investment Analyst (Acting Treasurer from August 2005 to February 2006)* (2003 – 2006)

Provided support in all areas of the treasury functions including management of City assets, investments and debt. Managed internal and risk controls for all Treasury activities. Provided debt & investment information for the annual financials and budgets, including standards for Generally Accepted Accounting Principles (GAAP) and Governmental Accounting Standards Board (GASB). Staffed personnel for programs created by the Treasury department. **Investments:** Monitored hedging program, Strategic Cash portfolio and fixed income money manager program; reviewed opportunities for new investment programs; reviewed and assisted in the revision of the Investment Policy; maintained the Investment & Borrowing Report for the Finance Committee. **Debt:** Reviewed financing options for the issuance of tax exempt debt; prepare RFP's for financial services, annual disclosure information, and rating agency presentation; review documents for new/outstanding bond issues & coordinate closings; develop and monitor debt schedules; initiate arbitrage calculations; transfer monthly debt service payments; review and key debt invoices. Participate in financing options and structures tax exempt credit markets; forecasted cash flows relative to disbursement needs. **Pension:** Participate in investment discussions with outside vendors; review portfolio and fund managers' performance.

**The Bank of New York – Jacksonville, Florida** (1996 – 1998)  
*Operations Administrator/Paying Agent*

Managed a paying agent and invested funds portfolio and assisted Trust Officers with daily cash management and operational functions in the area of corporate trust (bond) related issues including trust indentures, client relations, and response to general correspondence.

#### PRIOR EXPERIENCES AND INTERSHIPS

American Sterling Corporation – Jacksonville, Florida - *Client Service Supervisor*  
Corporate Software – Dallas, Texas - *Software Service Representative*  
Florida Power Corporation – Ocala, Florida - *Energy Service Representative*  
Barnett Bank – Ocala, Florida - *Loan Adjuster/HR Rep/Teller*

#### EDUCATION/CERTIFICATIONS

*Bachelor of Science in Economics & Minor in Business Administration,*  
*Florida State University – Tallahassee, Florida*

*Post Graduate Prerequisites, Samford University – Birmingham, Alabama*

**Certified Corporate Trust Specialist (CCTS) – Institute of Certified Bankers April of 2000**



*References available upon request*

## EMPLOYMENT APPLICATION



CITY OF JACKSONVILLE  
117 West Duval Street, Suite 100  
Jacksonville, Florida 32202  
(904) 630-1287

<http://www.coj.net/departments/employee-services.aspx>

Grant, Kevin B  
2017-02573 POLICE & FIRE PENSION FINANCE MANAGER

Received: 8/25/17 9:14 AM

For Official Use Only:

QUAL: \_\_\_\_\_

DNO: \_\_\_\_\_

Experience

Training

Other: \_\_\_\_\_

## PERSONAL INFORMATION

POSITION TITLE: POLICE & FIRE PENSION FINANCE MANAGER		EXAM ID# : 2017-02573
NAME: (Last, First, Middle) Grant, Kevin B		SOCIAL SECURITY NUMBER: N/A
ADDRESS: (Street, City, State, Zip Code) 2729 Egret Walk Terr, Jacksonville, Florida 32226		
HOME PHONE: (904) 477-7875	ALTERNATE PHONE:	EMAIL ADDRESS: kevingrant47@gmail.com
DRIVER'S LICENSE: <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	DRIVER'S LICENSE: State: FL Number: G653-502-67-266-0	LEGAL RIGHT TO WORK IN THE UNITED STATES? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No

## PREFERENCES

PREFERRED SALARY: \$90,000.00 per year	ARE YOU WILLING TO RELOCATE? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Maybe
WHAT TYPE OF JOB ARE YOU LOOKING FOR? Regular	
TYPES OF WORK YOU WILL ACCEPT: Full Time	
SHIFTS YOU WILL ACCEPT: Day	
OBJECTIVE: A finance specialist with 20+ years experience in banking, corporate and municipal asset/debt management; professional experience includes various levels of management.	

## EDUCATION

DATES: From: 1/1991 To: 5/1991	SCHOOL NAME: Samford University	
LOCATION: (City, State) Birmingham, Alabama	DID YOU GRADUATE? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	DEGREE RECEIVED: No Degree
MAJOR: Business Administration	UNITS COMPLETED: 1 - Quarter	
DATES: From: 8/1985 To: 5/1989	SCHOOL NAME: Florida State University	
LOCATION: (City, State) Tallahassee, Florida	DID YOU GRADUATE? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	DEGREE RECEIVED: Bachelor's
MAJOR: Economics	UNITS COMPLETED: 13 - Semester	

## WORK EXPERIENCE

DATES: From: 1/2015 To: Present	EMPLOYER: Fresh Ministries, Inc	POSITION TITLE: Chief Financial Officer
ADDRESS: (Street, City, State, Zip Code) 1131 N Laura Street, Jacksonville, Florida 32206		COMPANY URL: www.freshministries.org
PHONE NUMBER: 904-355-0000	SUPERVISOR: Dr. Robert Lee - CEO	MAY WE CONTACT THIS EMPLOYER? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
HOURS PER WEEK: 40	SALARY: \$8,729.00/month	# OF EMPLOYEES SUPERVISED: 20

DUTIES:  
Chief Financial Officer – Serve as senior-level leader that provides financial vision and leadership, strategic and tactical planning, development and coordination of all finances. Leads all financial operations, assesses organizational performance against both the annual budget and company's long term strategy, and ensures protection of the organization's assets and integrity of the financial information, and acts as an advisor to the Board of Directors.

Strategic  
Develop the tools and review systems necessary to provide critical financial and operational information to the CEO and makes actionable recommendations on both strategy and operations. Engage the board, executive and audit committees around financial issues, trends, and changes effecting Fresh Ministries (FM). Oversee short and long range financial planning to assure solvency for the organization and

management of cash flow. Serve as a member of the executive leadership team, overseeing 20+ employees. Develop and utilize forward-looking, predictive models and activity-based financial analyses to provide insight into the organization's operations and business plans.

#### Financial Management

Act as a signing authority and is authorized to obligate and commit the organization. Monitor and reports on administrative budget to budget team, management team and board of directors. Oversee all accounts, ledgers, ensuring compliance with appropriate Generally Accepted Accounting Principles, internal control safeguards, regulatory requirements, and OMB audit requirements. Reviews and analyzes financial statements, special reports and other operating data. Oversee year end close including review and/or preparation of all information required by the auditors to ensure that the organization passes its annual A-133 audit. Oversee the management of cash flow and forecasting. Manage and track the performance of the permanent fund in keeping with the policies and investment guidelines established by the Executive Committee. Remain up to date on nonprofit audit best practices and state and federal law regarding nonprofit operations.

Interim Director of Beaver Street Enterprise Center (BSEC) - Lead all functions of a two facilities business incubator. Source and recruit start-up companies with the potential to become successful at BSEC, balancing the pressure to maximize rent-up with a responsibility to retain space for expansion of existing tenants. Prepare, modify and execute the strategic plan of the incubator. Develop and implement the annual operating plan of the incubator as approved by the board. Provide timely and informed communications to the board relative to the operation of the incubator. Supply timely and cogent services to the clients of the incubator to ensure the maximum chance of business success to client companies. Develops and cultivates advisory teams and mentoring resources. Assist tenants to develop mutually beneficial, synergistic relationships among themselves. Help with proposals and with referrals to external and internal sources of necessary support services. Build BSEC's credibility through ongoing management-reporting and public relations activities and ensure sustainability and growth by seeking programmatic funding and other support. Assume complete profit & loss responsibility for BSEC. Supervise and manage BSEC's professional and clerical staff. Develops job descriptions and gives performance reviews and requests for salary increases. Coordinates team efforts and ensures that BSEC businesses receive the best of services.

#### REASON FOR LEAVING:

DATES: From: 10/2010 To: 1/2015	EMPLOYER: City of Jacksonville	POSITION TITLE: Operations Administrator
ADDRESS: (Street, City, State, Zip Code) 214 East Hogan Street, Jacksonville, Florida 32226		COMPANY URL: Con.net
PHONE NUMBER: (904) 630-2489	SUPERVISOR: Kimberly Scott - Director	MAY WE CONTACT THIS EMPLOYER? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
HOURS PER WEEK: 40	SALARY: \$6,667.00/month	# OF EMPLOYEES SUPERVISED: 1

#### DUTIES:

Manage budget & finances for the department; review and determine overall departmental operations and strategy; project manager for two energy efficiency grants.

#### REASON FOR LEAVING:

Other opportunity

DATES: From: 11/2006 To: 4/2010	EMPLOYER: Wells Fargo Bank	POSITION TITLE: Vice President / Relationship Manager /Team Leader
ADDRESS: (Street, City, State, Zip Code) , Jacksonville, Florida 32202		COMPANY URL: Wellsfargo.com
PHONE NUMBER: (904) 487-0000	SUPERVISOR: Brian Clark - Regional Manager	MAY WE CONTACT THIS EMPLOYER? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
HOURS PER WEEK: 40	SALARY: \$8,300.00/month	# OF EMPLOYEES SUPERVISED: 8

#### DUTIES:

Relationship manager for a diverse and top tier corporate trust book of business throughout the US. Managed 8+ relationship managers and cash managers. Duties included managing the debt portfolio for several customers, depositing and transferring fund according to trust documents. Opened various debt and investment vehicles. Visited clients as both relationship manager and as team leader.

#### REASON FOR LEAVING:

Downsized

DATES: From: 11/2003 To: 11/2006	EMPLOYER: City of Jacksonville	POSITION TITLE: Senior Investment Analyst / Acting Treasurer
ADDRESS: (Street, City, State, Zip Code) 117 West Duval, Jacksonville, Florida 32202		COMPANY URL: Con.net
PHONE NUMBER: (904) 630-2489	SUPERVISOR: Michael Givens - Treasurer	MAY WE CONTACT THIS EMPLOYER? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
HOURS PER WEEK: 40	SALARY: \$6,667.00/month	# OF EMPLOYEES SUPERVISED: 4

#### DUTIES:

- Provided support in all areas of the treasury functions including management of City assets and debt. Managed internal controls and risk management for all Treasury activities. Staffed specialist in the programs created by the Treasury department.

Investments: Monitored hedging program, Strategic Cash portfolio, fixed income money manager program and pension funding; Maintained the Investment & Borrowing Report for the Finance Committee; Reviewed and assisted in the revision of the Investment Policy; Reviewed opportunities for new investment programs. Pension: Participate in investment discussions with outside vendors; review portfolio and fund managers' performance.

Debt: Reviewed financing options for the issuance of tax exempt debt; prepare RFP's for financial services, annual disclosure information, and rating agency presentation; Review documents for new/outstanding bond issues & coordinate closings; develop and monitor debt schedules; initiate arbitrage calculations; transfer monthly debt service payments; review and key debt invoices. Participate in financing options and structures tax exempt credit markets; forecasted cash flows relative to disbursement needs. Provide debt & investment

information for the annual financials and budget.

Better Jacksonville Plan: Prepare excess calculation for Transportation cash flows, FAC/PAC calculations for the quarterly meeting & the Mayor's quarterly performance results; participate in financing options and structures; forecasted cash flows relative to disbursement needs.

Other Responsibilities: Provide debt & investment information for the annual financials and budget; Board member for the Departmental Quality Management Board (DQMB); Participate on the Professional Services Evaluation Committee as the Treasurer's designee; act as backup administrator for the Internal Loan Fund/Commercial Paper Program. Assisted in implementing the new credit card program. Responsible for staffing specialist in the programs created by the Treasury department.

REASON FOR LEAVING:

Accepted another career opportunity

#### CERTIFICATES AND LICENSES

TYPE:

Certified Corporate Trust Specialist (CCTS)

LICENSE NUMBER:

ISSUING AGENCY:

American Bankers Association

#### Skills

OFFICE SKILLS:

Typing: 50

Data Entry: 0

OTHER SKILLS:

LANGUAGE(S):

#### ADDITIONAL INFORMATION

Nothing Entered For This Section

#### REFERENCES

REFERENCE TYPE:

Professional

NAME:

Brian Clark

POSITION:

AVP

ADDRESS: (Street, City, State, Zip Code)

Jacksonville, Florida

EMAIL ADDRESS:

clarkbrian@bellsouth.net

PHONE NUMBER:

904 742-4072

REFERENCE TYPE:

Professional

NAME:

Rhonda Caraway

POSITION:

ADDRESS: (Street, City, State, Zip Code)

Jacksonville, Florida

EMAIL ADDRESS:

PHONE NUMBER:

904 655-1707

REFERENCE TYPE:

Professional

NAME:

Alea Tukes

POSITION:

Accounting Manager

ADDRESS: (Street, City, State, Zip Code)

Jacksonville, Florida 32202

EMAIL ADDRESS:

PHONE NUMBER:

904 251-5007

Agency-Wide Questions

1. Are you a former City of Jacksonville employee?  
Yes
2. If you are a former employee, select your department from the list below. If you are not a former employee, please select N/A.  
FINANCE AND ADMINISTRATION
3. Are you currently a City of Jacksonville employee?  
No
4. If you are a current employee, select your department from the list below. If you are not a current employee, please select N/A.  
N/A
5. Do you require an accommodation under the federal guidelines provided by the Americans with Disability Act (ADA)? If you mark "Yes" on this item, you will need to send an e-mail to [recruit@coj.net](mailto:recruit@coj.net) with your request. Verification of the disability may be required.  
No
6. Are you authorized to work in the United States without sponsorship from the City of Jacksonville either now or in the future?  
Yes
7. Do you reside in Duval County? Please note: residence is no longer required, but it is preferred.  
Yes
8. Do you consent to the City of Jacksonville conducting personal reference checks, employment verification, a criminal background check, and educational verification?  
Yes
9. Did you list on your application ALL employers within the last 10 years.  
Yes
10. Are you a military veteran of the United States Armed Forces? Applicants who claim veteran's preference in hiring are required to submit a DD-214 (Form 4) and a VA disability certification (if applicable) with their applications prior to the closing date. See the attachments section of your application.  
No
11. Veterans requesting preference in employment must submit a certification form(s) along with the DD-214 or military discharge papers, or equivalent certification from the Department of Veterans Affairs, listing military status, dates of service and character of discharge. All veterans requesting preference in employment must print, complete, and attach the Veterans Preference Certification form(s) along with the DD-214 or military discharge papers. FDVA Veteran's Preference Certification Form VP-1 can be found at [www.coj.net/jobs](http://www.coj.net/jobs) and click on Veteran's Preference in the slide out menu on the left.  
I am not requesting Veterans Preference
12. If you are requesting preference as an unremarried widow or widower, the Certification of Unremarried Widow or Widower form must be printed, completed, and attached along the DD-214 or military discharge papers and the Veterans Preference Certification form. FDVA Certification of Unremarried Widow or Widower Form VP-3 can be found at [www.coj.net/jobs](http://www.coj.net/jobs) and click on Veteran's Preference in the slide out menu on the left.  
I am not claiming veteran's preference.
13. If you are requesting preference as a current member of a reserve component of the United States Armed Forces or the Florida National Guard, the Certification of Current Member of Reserve Component of the United States Armed Forces or the Florida National Guard form is also required to be printed, completed, and attached along with the DD-214 or military discharge papers and the Veterans Preference Certification form. FDVA Certification of Current Member of Reserve Form VP-2 can be found at [www.coj.net/jobs](http://www.coj.net/jobs) and click on Veteran's Preference in the slide out menu on the left.  
I am not claiming veteran's preference.
14. Where did you first hear about this opportunity?  
Indeed
15. If you selected job fair in the above question, indicate which job fair you attended.  
None

Job Specific Supplemental Questions

- Each applicant must complete this supplemental questionnaire as a part of the application screening and selection process. The information you provide will be reviewed and used to determine your eligibility to move forward in the selection process. Copying and pasting your resume or stating "see resume" does NOT fulfill the requirements of the question. Incomplete responses, false statements, omissions, or partial information may result in disqualification from the selection process. Do you agree to answer each supplemental question truthfully and certify that your responses can be verified from information included within the application?
1. Yes
  2. Do you have a bachelor's degree or higher from an accredited college or university? If yes, you MUST attach a copy of your college transcripts to your application.  
Bachelor's Degree
  3. If you have a degree, indicate which degree you have and include any major/minor. A copy of your college transcript is required.  
Bachelor of Science in Economics
  4. Do you have at least five years financial management experience?  
Yes, 5 years or more
  5. If you answered yes to question # 4, Indicate the organization(s) you worked for where you gained this experience.  
Bank of New York (2 years)  
First Union Bank (Wachovia) (5 years)  
COJ Treasury (3 years)  
Wells Fargo Bank (4 years)  
COJ Neighborhoods Dep (5 years)  
Fresh Ministries, Inc. (1.5 years)
  6. Provide a detailed description (at least 3-4 complete sentences) of your experience listed in question # 4.  
All banking-Administered a corporate trust book of issued bonds including corporate, municipal, industrial development; state assisted housing, variable rate issues, custody, and escrows, with a portfolio value of \$3 billion of managed assets. Maintained large revenue accounts while promoting good corporate/municipal client relationships with upper level executive and financial contacts. Oversaw all accounts, ledgers, ensuring compliance with appropriate Generally Accepted Accounting Principles (GAAP), perform general ledger accounting duties, account reconciliation, and funds transfers. Explored new business sales opportunities through interactions with clients, attorneys, financial advisors, brokers, and commercial bankers and promoted other products and services offered by the Bank. Managed invested funds within the trust and escrow accounts to ensure proper transfers, disbursements, and investments pursuant to document guidelines; forecasted cash flows relative to disbursement needs.  
  
COJ Neighborhoods-Served as financial and operational liaison to the Director of Neighborhoods Department in the day-to-day operations of the department with operational, financial and logistical support to the department which includes annual budget analysis and tracking, budget development, auditing, and in depth process analysis for seven (7) divisions and nine (9) activities. Responsible for managing the processing, reconciliation, and auditing of procurement and accounting functions and ensuring the accurate maintenance of accounts (index and sub-object), purchase orders, blanket order balances, grants, and trust funds, including federal and state funds. Perform general ledger accounting duties, account reconciliation, and funds transfers in accordance with departmental needs. Managed the budget process for the department, including monitoring to ensure goals and objectives are met. Represented the department at various meetings with regards to operational and administrative matters; review revenue reconciliation for the department; developed departmental policies regarding operational functions. Provided ad hoc reporting as necessary.  
  
COJ Treasury-Provided support in all areas of the treasury functions including management of City assets, investments and debt. Managed internal and risk controls for all Treasury activities. Provided debt & investment information for the annual financials and budgets, including standards for Generally Accepted Accounting Principles (GAAP) and Governmental Accounting Standards Board (GASB).
  7. Are you a Certified Public Accountant?  
No
  8. Do you have Government accounting experience?  
Yes
  9. If you answered yes to question # 8, Indicate the organization(s) you worked for where you gained this experience.  
City of Jacksonville
  10. Provide a detailed description (at least 3-4 complete sentences) of your experience listed in question # 8.  
COJ Neighborhoods-Served as financial and operational liaison to the Director of Neighborhoods Department in the day-to-day operations of the department with operational, financial and logistical support to the department which includes annual budget analysis and tracking, budget development, auditing, and in depth process analysis for seven (7) divisions and nine (9) activities. Responsible for managing the processing, reconciliation, and auditing of procurement and accounting functions and ensuring the accurate maintenance of accounts (index and sub-object), purchase orders, blanket order balances, grants, and trust funds, including federal and state funds. Perform general ledger accounting duties, account reconciliation, and funds transfers in accordance with departmental needs. Managed the budget process for the department, including monitoring to ensure goals and objectives are met. Represented the department at various meetings with regards to operational and administrative matters; review revenue reconciliation for the department; developed departmental policies regarding operational functions. Provided ad hoc reporting as necessary.  
  
COJ Treasury-Provided support in all areas of the treasury functions including management of City assets, investments and debt. Managed internal and risk controls for all Treasury activities. Provided debt & investment information for the annual financials and budgets, including standards for Generally Accepted Accounting Principles (GAAP) and Governmental Accounting Standards Board (GASB).

11. Do you have Pension administration experience?  
Yes
12. If you answered yes to question # 11, Indicate the organization(s) you worked for where you gained this experience.  
City of Jacksonville
13. Provide a detailed description (at least 3-4 complete sentences) of your experience listed in question # 11.  
Pension: Participate in investment discussions with outside vendors; review portfolio and fund managers' performance. Provided RFP's to managers and response reviews for fund managers as part of the selection committee. Reviewed potential investment types, including timber as part of the portfolio.
14. Do you have experience in one or more of the below fields? Please check all that apply.  
Accounting, Investment, Financial Reporting, Compliance, Budget, Contract Administration, Property Management
15. If you checked one or more fields in question # 14, Indicate the organization(s) you worked for where you gained this experience.  
Bank of New York (2 years)  
First Union Bank (Wachovia) (5 years)  
COJ Treasury (3 years)  
Wells Fargo Bank (4 years)  
COJ Neighborhoods Dep (5 years)  
Fresh Ministries, Inc. (1.5 years)
16. Provide a detailed description (at least 3-4 complete sentences) of your experience listed in question # 14.  
All banking-Administered a corporate trust book of issued bonds including corporate, municipal, industrial development; state assisted housing, variable rate issues, custody, and escrows, with a portfolio value of \$3 billion of managed assets. Maintained large revenue accounts while promoting good corporate/municipal client relationships with upper level executive and financial contacts. Oversaw all accounts, ledgers, ensuring compliance with appropriate Generally Accepted Accounting Principles (GAAP), perform general ledger accounting duties, account reconciliation, and funds transfers. Explored new business sales opportunities through interactions with clients, attorneys, financial advisors, brokers, and commercial bankers and promoted other products and services offered by the Bank. Managed invested funds within the trust and escrow accounts to ensure proper transfers, disbursements, and investments pursuant to document guidelines; forecasted cash flows relative to disbursement needs.  
  
COJ Neighborhoods-Served as financial and operational liaison to the Director of Neighborhoods Department in the day-to-day operations of the department with operational, financial and logistical support to the department which includes annual budget analysis and tracking, budget development, auditing, and in depth process analysis for seven (7) divisions and nine (9) activities. Responsible for managing the processing, reconciliation, and auditing of procurement and accounting functions and ensuring the accurate maintenance of accounts (index and sub-object), purchase orders, blanket order balances, grants, and trust funds, including federal and state funds. Perform general ledger accounting duties, account reconciliation, and funds transfers in accordance with departmental needs. Managed the budget process for the department, including monitoring to ensure goals and objectives are met. Represented the department at various meetings with regards to operational and administrative matters; review revenue reconciliation for the department; developed departmental policies regarding operational functions. Provided ad hoc reporting as necessary.  
  
COJ Treasury-Provided support in all areas of the treasury functions including management of City assets, investments and debt. Managed internal and risk controls for all Treasury activities. Provided debt & investment information for the annual financials and budgets, including standards for Generally Accepted Accounting Principles (GAAP) and Governmental Accounting Standards Board (GASB).
17. A copy of your resume and college transcript is required with your application. College transcripts do not need to be official, but must state your name, the name of the school, type of degree, and date received. Transcripts from colleges outside of the U.S. must be converted to U.S. Standards. If required documents are not provided your application will be considered incomplete and may result in disqualification from the selection process.  
I have read and understand the above statement.
18. If you are requesting veterans preference, you MUST download the appropriate state of Florida form and attach it to our application. Failure to do so will delay your veterans preference status. Please download the forms at <http://www.coj.net/departments/employee-services/veterans-preference>  
No, I am not claiming veterans preference and this does not apply to me.

This application was submitted by Kevin B Grant on 8/25/17 9:14 AM

KEVIN B. GRANT  
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904-477-7875 Cellular  
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September 15, 2017

Mr. Timothy H. Johnson, Executive Director  
Jacksonville Police and Fire Pension Fund  
One West Adams Street, Suite 100  
Jacksonville, Florida 32202  
Via Email: THJohnson@coj.net

Re: Ideal Candidate for the Finance Director's Position within the Jacksonville Police and Fire Pension Fund (PFPF)

Hello Mr. Johnson,

It was a pleasure meeting with you on September 14, 2017, to discuss further the aforementioned position of Finance Manager. Pursuant to our conversation, please see my response below as to why I would make the ideal candidate for Finance Manager:

Initially, I would like to point out my prior my experience within the City of Jacksonville's Treasury division as Senior Investment Analyst and the Neighborhoods' Department as the Finance Manager for a total of eight (8) years as noted on the attached resume. With this experience in the City, it gives me an advantage to come into the workplace to "hitting the ground running" by understanding the policies, procedures and structures already in place, with minimal time needed to update my knowledge of any changes. Accordingly, I still possess the knowledge of the accounting system, FAMIS, along with becoming familiar again with the holdings, managers and advisors for the PFPF.

As outlined in our meeting for the Strategic Initiatives and the related goals, I have the ability to be able to recommend and revise policies, set strategies, review pertinent documentation in detail to direct all activities relative to counterparties involved, such legal, fund managers and advisors. Based on my experiences within a municipal organization, I will identify the appropriate parties needed to be involved; set relative timelines with updates accordingly; and finally moving such initiatives to a close.

My next point of interest as ideal candidate as Finance Manager would be my ability to multitask on several projects and job responsibilities. As mentioned in my resume, my prior municipal experience included the last position of Finance Manager (formerly Operations Administrator) in the Neighborhoods Department with four (4) divisions and at times four to seven (4-7) activities. Within my role, it was vital for the budgets to be aligned with divisions or activities; operational standards were met, such as setup, proposed budget schedules and ongoing management; realignment of fund movement; provide grant review and reporting standards; and finally recommending final review for each as to the future status or life as a need or functional activity. This shows my intense level of multitasking with multiple activities. I would gladly request references from any prior department head to support my successes of multitasking projects.



Finally, my vast professional experiences have allowed me use my analytical skills when identifying complex transactions. I have handled large cash transactions on a day-to-day basis to ensure proper management of the funds to be invested, transferred or disbursed pursuant to governing documents. In addition, I have collected, maintained and reported financial data relative to comprehensive annual financial reports (CAFR's), advisory/management boards, the mayor's office and other municipal council members. My professional background includes several years of team leadership and supervisory experience. My strong points include effective management through organization, time management, direct communication between the manager and my team members, and the development of strong relationships with both internal and external clients. I also possess extensive knowledge in the use of various computer applications.

I hope I have answered your question in detail. I would appreciate the opportunity to discuss in more detail my qualifications and abilities as needed.

Thank you,

A handwritten signature in black ink, appearing to read 'Kevin Grant', is centered on a light gray rectangular background.

Kevin Grant

# **Kevin Grant – Summary of References**

## ***In what capacity do you know the candidate?***

- “Almost 20 years. Worked at Bank of NY together in Trust. Worked First Union that became Wachovia. Worked with him at COJ Treasury.”

## ***What were the candidate’s duties?***

- “He was the team leader – supervised relationship specialists. He had clients that he managed, as well as a relationship manager.”
- “Banking – trustees working on bonds; cash management; read legal governing documents for individual trusts; bond closings and interact with issuers and legal counsels involved. COJ in Treasury – worked on bond SWAT and Better Jacksonville Program. PSAC, budget, attended meetings.”
- “Oversaw finances for entire department, as well as other divisions. Purchasing activities. Monitored budgets.”
- “He was responsible for the general maintenance of debt program. Other general treasury duties – investments and cash management.”

## ***What are the candidate’s interests in and out of work?***

- “Inside- He a [sic] stickler for details. Likes to get things right the first time. Very personable. Interacts well with everyone.”
- “Outside – Family man. Football guy. A true person. Inside – Easy to get along with. Well-liked and respected. Great with numbers. Great leadership skills. Strong relationships with budget. Strong and dedicated.”
- “Inside – He had an interest in technical items. Research. Dealing with complex issues.”

## ***Can you describe how the candidate was able to meet expectations for the position and achieve success? Can you describe how the candidate performed on 2-3 projects?***

- “Very organized. Keep on top of things. Great with Excel. Good memory. Very strong at juggling many projects at one time. Has an eye for the big picture. Keeps good notes about what is going on...Use to having multiple projects at one time. Always willing to deal with other things amongst the many projects.”
- “Reorganized department in 2014 – took on new divisions. He knew her expectations – hard task manager – conformed and took on responsibilities. He was an integral part of the financial

## **Kevin Grant – Summary of References**

side of operations. He understood the importance of staying within budget and was able to quickly provide information on status. Very responsible!”

- “Being a leader. He is great at organization and leading staff. Planner – likes to plan next step. A forward thinker. Take a little bit of information and get the job done. He was right hand person to the Treasurer at one point.”

### ***How quickly was the candidate able to adapt to your environment? Where did he or she have challenges understanding protocols and political culture?***

- “Extremely well. Very unique line of business – so many moving parts- risk management; negotiating complex million and sometimes billion dollar transactions; service clients; perform business development. He adapted quickly. Had a very flat learning curve –didn’t take long for him to get up to speed on any aspect.”
- “He understood political culture b/c he worked in Treasury, as well as Environmental Compliance Dept. and Neighborhoods, due to 2014 transitions. About three transitions total. Many changes. He was immediate to jump in. Was great and helpful at budget time.”
- “3-6 months – pretty good for tasks he had to take on. Person before him had been there for 20 years, No challenge with political culture. Had to figure out what department standards were and SOP’s. Researching and reading required.”

### ***What was the company culture where you worked together? (fast paced, entrepreneurial, long work hours, laid back, good work life balance, competitive, dysfunctional) Did the candidate thrive in this environment? Why or why not?***

- “COJ – a lot of personalities coming together for a common purpose. Working with money and finances, unexpected things come up that cause stress. Multi-faceted environment.”
- “Yes, he performed well in that environment. He didn’t wilt from challenges.”

### ***Was the candidate ever disciplined, demoted or terminated? If so, reason.***

- “No.”

### ***If I were to hire the candidate and six months from now you heard he/she was fired without any other context, what would be your best guess as to why he/she was fired?***

- “Wouldn’t have a guess – would be shocked and floored.”

## **Kevin Grant – Summary of References**

### ***Would you rehire this person?***

- “In a heartbeat!”

### ***Are you able to enthusiastically recommend this person?***

- “Yes!”
- “Yes! 10 out of 10! Genuine person that cares about his job. Will get your money’s worth.”
- “Oh yes, definitely! High praises on many occasions.”



**Finance Manager Candidate Evaluations**  
**Average Scores**  
**0-5 Rating Scale**

Criteria	Weight	Candidate 1	Candidate 2	3 - Kevin B. Grant	Candidate 4	Candidate 5	Candidate 6	Candidate 7
		Rating	Rating	Rating	Rating	Rating	Rating	Rating
<b>Job Functions:</b>								
Accounting	6%	5.00	4.50	4.00	4.00	2.00	4.00	3.00
Investment	4%	1.00	0.00	5.00	5.00	1.00	2.00	2.67
Reporting	4%	5.00	5.00	5.00	5.00	2.00	4.00	2.33
Compliance	4%	5.00	5.00	5.00	5.00	2.00	3.00	2.33
Budget	3%	4.67	5.00	5.00	5.00	3.00	4.00	2.67
Purchasing	3%	5.00	5.00	5.00	5.00	3.00	2.00	2.33
Contract Administration	3%	4.33	5.00	5.00	5.00	2.00	2.00	2.33
Property Management	3%	1.00	0.00	4.33	3.00	0.00	2.00	0.33
<b>Knowledge, Skills, and Abilities</b>								
	10%	5.00	4.00	5.00	5.00	2.50	4.00	2.67
<b>Required:</b>								
Degree	10%	5.00	5.00	5.00	5.00	2.50	5.00	4.33
5 Years' Experience	10%	5.00	5.00	5.00	5.00	5.00	5.00	4.33
<b>Preferred:</b>								
CPA	5%	5.00	0.00	0.33	0.00	0.00	0.00	0.33
Government Experience	5%	4.67	5.00	4.67	4.00	3.50	3.00	1.33
Pension Experience	5%	0.33	0.00	3.00	0.00	0.00	0.00	3.33
<b>Interview</b>								
	25%	4.67	3.00	4.67	3.00	2.50	3.00	1.33
<b>Total</b>	<b>100%</b>	<b>60.67</b>	<b>51.50</b>	<b>66.00</b>	<b>59.00</b>	<b>31.00</b>	<b>43.00</b>	<b>35.67</b>
		<b>87.13%</b>	<b>70.40%</b>	<b>89.73%</b>	<b>76.60%</b>	<b>47.20%</b>	<b>64.00%</b>	<b>48.40%</b>