CITY OF MIAMI BEACH
Office of the City Manager
Letter to Commission No. 145-2004

To: Mayor David Dermer and Members of the City Commission

Date: June 9, 2004

From: Jorge M. Gonzalez
City Manager

Subject: **KATHIE BROOKS**

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CITY CLERK'S OFFICE

This Letter to the Commission is to inform you of a recent appointment I have made in the Administration. Effective Tuesday, June 8, 2004, Kathie Brooks joined the City of Miami Beach as the Director of the Office of Budget and Performance Improvement (OBPI). The Office of Budget and Performance Improvement includes the areas of Management and Budget (OMB), Internal Audit, Grants Management and Organizational Development. This position will report directly to me.

Kathie comes to us with more than 20 years experience in public administration with Miami-Dade County, including a strong background in budgeting, finance, management, strategic planning, performance improvement and measurement. In addition, Kathie has lived on Miami Beach for more than 18 years. A detailed resume and professional summary of Kathie's employment history is attached for your review.

Most recently, Kathie served as the Assistant Director of Management Planning and Strategy for the Miami-Dade County Office of Strategic Business Management, an office whose function is very similar to our Office of Budget and Performance Improvement. As the Assistant Director, Kathie was responsible for working with the County Budget staff to ensure that financial resources were aligned with the County's strategic plan and priorities and working to ensure that each Department in the County developed a business plan that tied in to the County's strategic plan and that performance measures were developed as part of these plans.

Prior to that position, Kathie served as the Strategic Plan Coordinator for the Miami-Dade County Office of Performance Improvement. In this position, she was responsible for the development and implementation of the first-ever integrated countywide strategic plan for Miami-Dade County government.

From 1991 to 2001, Kathie was the Assistant Director of Finance and Planning for the Miami-Dade County Department of Solid Waste Management where she managed all financial, procurement, planning, information services and human resources functions for the Department of Solid Waste Management. The Department's total operating and capital budget during Kathie's tenure was approximately $220 million.

Prior to this position, Kathie served in a number of other positions with Miami-Dade County, including as a Chief of Management and Budget in the Department of Waste Management, a Manager of Transportation Planning and Metromover Development and a Principal Planner/Transit Research Supervisor with the Miami-Dade Transit Agency.

Please join me in welcoming Kathie to our team. I am sure that you will find her to be highly qualified and professional. Should you have any questions, please feel free to contact me.

JMG\ri

Attachment

c: Management Team

F:/cmgr/all/LTC04/KathieBrooks

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6039 LA GORCE DRIVE
MIAMI BEACH, FL 33140
305-867-7876 (Home) 305-349-6131 (Work) 305-321-7876 (Cell)

EMPLOYMENT HISTORY

2003 – 2004 **Assistant Director, Management Planning and Strategy**
Miami-Dade County, Office of Strategic Business Management

Highly responsible management position accountable for Strategic Planning and Management within the Office of Strategic Business Management (OSBM). The position provides direct policy support to the County Manager's Office related to development and multi-year implementation of a framework for *results-oriented government* and performance excellence. Responsibilities include the implementation of and updates to a Countywide Strategic Plan, implementation of a performance management system; and communicating the results-oriented government strategy throughout the organization and to the community. Focus includes developing, coordinating supporting departmental business plans and performance measures; providing liaison functions with the Budget staff within OSBM to ensure, through the budget process, that financial resources, policy, department operations and County staff are all aligned to achieve results; providing liaison functions with the Employee Relations Department, the Chief Information Officer for the County, the Communications Department and Enterprise Technology Services to ensure that everyone in our organization is aware of his/her unique role in achieving the County's Strategic Plan and supporting the Departmental Business Plan; and deploying performance excellence throughout the organization.

Accomplishments:

- ✓ Developed and implemented the Miami-Dade County framework for Delivering Excellence Through Results-Oriented framework, recognized by the Washington-based think tank, the Performance Institute, for its 2004 Performance Management Award.
- ✓ Coordinated and provided assistance in the development of department business plans in support of the Countywide Strategic Plan; including required format, training, etc. All Department business plans are available through the internet
- ✓ Coordinated the development and implementation of a results-oriented approach to the County's budgeting process, including recommendation of methodologies to allocate resources based on Countywide Strategic Plan priorities; and report formats to communicate this information to the community
- ✓ Coordinated and provides assistance in the development of individual performance objectives for senior management appraisals in the County Manager's Office and in all County departments in support of department business plans
- ✓ Coordinated development of communications plans and training curriculum for results-oriented government and performance excellence to ensure full understanding throughout the organization, including development of a delivering excellence website.
- ✓ Directed and performed outreach with departments, elected officials and the community at large regarding the County's strategic plan, results-oriented government, etc

2001 – 2003 **Strategic Plan Coordinator**
Miami-Dade County, Office of Performance Improvement

Responsible for the development and implementation of the first-ever integrated countywide strategic plan for Miami-Dade County government. Responsibilities include outreach and consensus building with elected officials, County Manager's Assistants, Department Directors and the public at large; and developing work plans and managing consultants for the project.

Accomplishments:

- ✓ Developed and simultaneously coordinated eight planning teams comprised of Assistant County Managers, department directors, planning support staff, community leaders, elected officials, business groups, etc.
- ✓ Conducted surveys, workshops and focus groups with residents, employees, elected officials, executives, etc.
- ✓ Assessed countywide trends and evaluated strengths, weaknesses, opportunities and challenges.
- ✓ Developed county government's first-ever mission statement, value statement, and nine priority themes to guide the process. These were endorsed by the Board of County Commissioners on May 21, 2002.

- ✓ Developed strategic goals covering all areas of service delivery including economic development, health and human services, neighborhood services, public safety, culture and recreation and transportation. These support the county's mission and align with the priority themes.
- ✓ Organized and conducted the county's strategic planning community event, with several hundred participants to develop and prioritize recommended actions to achieve the goals.
- ✓ Developed key intended outcomes, strategies and preliminary performance objectives and measures for each goal incorporating input from the community event and planning teams. These were endorsed by the Board of County Commissioners on June 3, 2003.
- ✓ Drafted goals, strategies and preliminary performance measures for internal functions required to support the service delivery plans
- ✓ Coordinated linkage between the Countywide strategic plan, annual department business plans and the budget process
- ✓ Responsible for plan deployment and other components of performance excellence including:
    - Dissemination of the plan throughout the community and the organization
    - Coordination with Employee Relations regarding plan-related training enhancements to the County's employee orientation and supervisory training programs
    - Coordination of interface to performance appraisal systems
    - Enhancements to departmental quarterly performance reporting

1991 – 2001 Assistant Director, Finance and Planning
Miami-Dade County, Department of Solid Waste Management

Managed all financial, procurement, planning, information services and human resources functions for the Department of Solid Waste Management, including responsibility for all performance and financial reporting, resolution of accounting issues, coordination with outside bond rating agencies, operating and capital budgets of approximately $200 million and $20 million per year respectively, organizational reviews and efficiency studies, all departmental service and construction contract development and administration, development and implementation of long-range and strategic plans, recruitment, labor relations and contract negotiation, and payroll.

Directly responsible for four professional divisions, an 80 member staff and $6 million in annual expenditures.

Provided primary support to the department director for policy recommendations and decisions, including the development of all legal mechanisms required to support these decisions such as proposed ordinances, administrative orders, and coordination of the department's agenda items for the Board of County Commissioners.

Representative Accomplishments:

- ✓ Served as only solid waste issuer member of sub-committee for the development of the National Federation of Municipal Analysts (NFMA) Recommended Best Practices in Disclosure of Solid Waste Transactions (issued November 2001).
- ✓ Served as the department liaison with the County Manager's appointed management team in developing the Department of Solid Waste Management's first ever strategic plan – 1995 Strategic Plan for Metropolitan Dade County Solid Waste Management. As liaison coordinated all department and consultant plan development efforts and subsequent implementation.
    - The plan provided business recommendations to ensure the long-term stability of the county's solid waste department in response to the changing solid waste environment of the 1990's.
    - A critical component of the plan was the organizational review and resulting rightsizing of the Department, with the successful reduction in $28 million in costs and over a 20 percent reduction in the number of employees.
    - The plan and its implementation resulted in an upgrade in the ratings for the county's solid waste revenue bonds.
- ✓ Department of Solid Waste Management liaison with investment firms and bond rating agencies, including Standard and Poors', Moody's Investment Services, Fitch IBCA, MBIA, etc., including development of 5 and 20 year financial capacity plans for the department. Member of the County's Manager's Financial Advisory Committee.

  Negotiations

- ✓ Served as a member of the County Manager's Negotiating Committee for Martin Luther King Metrorail Station joint development project successfully negotiating the innovative private-public partnership agreements with

the BAC Funding Corporation (BAC), a Florida not-for-profit corporation for development and construction of an administrative office, lease of the facility and a purchase option by the County. The innovative nature of the agreement provided for the cash flow received by BAC to be utilized for not-for profit community and economic development purposes as defined under the BAC charter.

- ✓ Member of the negotiating team for various contract amendments with the private operator of the county's Resources Recovery Facility, an operations and maintenance agreement of $60 million per year.
- ✓ Member of the negotiating team for AFSCME labor agreements pertaining to the solid waste employees for Miami-Dade County.
- ✓ Department lead in the expedited procurement of the $82 million Hurricane Andrew Debris Disposal contract.
- ✓ Coordinated reimbursement of over $100 million in Hurricane Andrew related expenses from the Federal Emergency Management Agency (FEMA), including negotiation of reimbursement scopes of work and estimated expenditure impacts, and documented actual expenses.

Planning, Development and Economic Analyses

- ✓ Managed the Miami-Dade County Main Landfill Re-Use Study
- ✓ Developed and implemented long range plans for the Department of Solid Waste Management, including interfaces with the county's Comprehensive Development Master Plan process and level-of-service standards
- ✓ Managed the 1995 Solid Waste Special Assessment District Study, including the development and implementation of a countywide survey of all solid waste generation in Miami-Dade County by land use type and 5-year financial projections to estimate potential assessment rates
- ✓ Managed the 1994 Dade County Solid Waste Transfer Station Efficiency Study that recommended cost effective alternatives to improve the efficiency of three regional solid waste transfer facilities.
- ✓ Developed and implemented an innovative facility permitting ordinance whereby proposed solid waste management facilities must be reviewed to ensure that these have no impacts on the department's financial viability nor the department's ability to comply with State and Federal regulations and contractual obligations.

1989 – 1991 Chief, Management and Budget Division
Miami-Dade County, Department of Solid Waste Management

Managed the preparation and monitoring of the department's annual operating and capital budget in excess of $200 million annually, ensuring coordination with the department's capital plans, and determining problems and associated recommendations for corrective action where necessary. Monitored the use of bond funds for capital projects. Conducted special studies in productivity improvements and cost benefit analysis to support the budget process and evaluate the impact of various policy alternatives. Implemented grants monitoring procedures for the department in association with the receipt of first time grants in excess of $4 million per year; developed interlocal agreements with municipalities for grants funds, and prepared grant applications and expenditure reimbursement requests.

Managed the billing and collection functions for waste collection from approximately 260,000 residential and commercial customers, including the establishment of procedures and reports to ensure the timely and effective collection of receivables from customers. Determined required enhancements to the computerized billing system to resolve billing deficiencies.

Coordinated routing and scheduling of all garbage and bulky waste collection services.

Managed all procurement and contract activities for the Department including development of Departmental procedures to ensure compliance with County, State, and Federal procurement regulations and resolution of issues related to product quality, timeliness of deliveries, etc.

Representative Accomplishments:

- ✓ Managed the Variable Rates feasibility Study for Metropolitan Dade County, evaluating the impacts of a rate system that charged users for waste collection in proportion to the amount of waste generated.
- ✓ Managed the development of the Miami-Dade County Solid Waste Financial Capacity Modeling System (including revenue forecasting, capital replacement, debt service coverage, etc.)

- ✓ Negotiating team member and managed implementation of the county first-ever Curbside Recycling Contract, providing service to approximately 270,000 homes.
- ✓ Responsible for the selection and implementation of an automated garbage routing system for the Department of Solid Waste Management.

1988 – 1989 Manager, Transportation Planning and Metromover Development
Miami-Dade Transit Agency

Spearheaded the Department's efforts in completing the planning and development for the expansion of the County's Metromover (people-mover) system in downtown Miami, Florida, including consultant management, technical supervision of ridership forecasts, funding contract negotiations with Federal and State governments, coordination with public groups, project coordination with the Public Works Department and the County Attorney's office.

Managed all transit agency coordination with the county's Planning Department, including updates to the transportation component of the Comprehensive Development Master Plan and data requirements for long range transportation planning and forecasting. Managed all transit agency coordination with the county's Metropolitan Planning Organization (MPO), including direct responsibility for major updates to the county's long-range transportation plan; and project prioritization and compliance for the transit agency's component of the MPO's annual Unified Planning Work Program.

Representative Accomplishments:

- ✓ Project Manager for the Miami Metromover Development, including federal acceptance of the Final Environmental Impact Statement for Metropolitan Dade County and the Local Perspective Report for the Completion of the Miami Metromover
- ✓ Team member in the development of the transit financial capacity models (including revenue forecasting, capital replacement, debt service coverage, etc.) – provided the transportation planning interface to the models by directly linking the County travel behavior models and ridership forecasts to the financial models projecting revenues and expenditures.
- ✓ Project Manager for the South Miami Parking Garage Expansion Environmental Assessment and supporting South Miami Metrorail Parking Garage Expansion Report

1984 – 1987 Principal Planner/Transit Research Supervisor
Miami-Dade Transit Agency

Supervised all research activities for the Planning Division to collect performance information required to evaluate transit service and provide input for travel demand models and analyses. Managed development and implementation of surveys and developed computer programs to analyze survey data. Developed, calibrated and validated a transit fare-ridership elasticity models to determine the effects of fare changes on ridership and providing a basis for evaluating revenue impacts of proposed fare changes.

1980 – 1983 System Planner
Schimpeler Corradino Associates, Coral Gables, Florida

Developed instruments, training manuals and procedures for travel behavior surveys, including home interviews, mail surveys, on-board bus surveys and telephone surveys. Reviewed and analyzed results using statistical techniques to determine origin-destination travel paths, trip generation data, and mode choice information to calibrate travel demand models. Supervised the data processing section, providing technical support for the development of a broad range of computer applications.

OTHER PROFESSIONAL EXPERIENCE

2001 – Present Officer
The Bayshore Visions Group, Inc.

Serves as one of three officers managing the real estate investments of the corporation on a part-time basis.

EDUCATION

Master of Arts in Geography, 1983
Summa Cum Laude
University of Miami, Coral Gables, Florida
Transportation and Urban Economics concentration

Bachelor of Arts in Geography, 1978
Magma Cum Laude
University of Miami, Coral Gables, Florida
Environmental concentration

Member of American Institute of Certified Planners, and member of American Planning Association

PUBLICATIONS AND AWARDS

National Association of Counties 2003 Achievement Award Winner, Miami Dade County Strategic Planning Initiative

"Strategic Planning for Municipal Enterprises" Government Finance Review, Volume 15, Number 2, April 1999.

Solid Waste Association of North America, 1998 Planning and Financial Management Excellence Award

National Association of Counties 1996 Award Winner, 1995 Strategic Plan for Metropolitan Dade County Solid Waste Management

"Miami Downtown People Mover Demand Analysis", Transportation Research Record 1167, 1989 (with M. Sung)

"Trip Generation by Cross-Classification: An Alternative Methodology", Presented at the Transportation Research Board Annual Meeting, January 1983, Transportation Research Record (with P. Stopher)