

Finance

Story by Mindy DeYoung, Liaison to the Office of Finance; Photos courtesy Finance



Outstanding Service

Finance honors employees for providing outstanding service.

On June 3, the Office of Finance celebrated its annual Outstanding Service Awards ceremony at the DoubleTree Hotel downtown. Antoinette Christovale, General Manager, recognized the top two percent of the Department's workforce by honoring this year's seven recipients for their exceptional performance and dedication to the job.

Ms. Christovale opened the proceedings by reflecting on the year's accomplishments and praising all honorees for their exceptional professionalism and contributions to the department. She also took the opportunity to thank all Finance staff for their service and dedication throughout the year.

Finance completed its 14th year of operation and has made substantial improvements in its revenue

collection efforts. In total, Finance is responsible for the collection of more than \$2.5 billion in revenue annually. This revenue is used to pay for essential City services including public safety, libraries, and parks and recreation. The number of taxpayers registered with the Office of Finance has grown from 238,000 to 465,000, a 95 percent increase since the department's inception. With the addition of treasury operations in 2011, Finance administers a \$50 billion cash and debt management program and actively manages an \$8 billion investment portfolio for the City of Los Angeles.

Miguel Sangalang, Director of Innovation and Performance Management Unit (IPMU) and Matthew



Employee of the Year, with his supervisors and Finance's Executive Team, from left: Assistant Director Ed Cabrera, Joel Cortez (Employee of the Year), Henry Fong, Ki Lee, Director of Finance/City Treasurer Antoinette Christovale, and Robert Lee.

Crawford, Budget Director, from the Mayor's Office attended the event on behalf of Rick Cole, the Deputy Mayor of Budget and Innovation. Both Mr. Sangalang and Mr. Crawford thanked the management team for inviting them to the event, as well as realizing the value of their employees' efforts. Ms. Christovale, Assistant Director of Finance, Saul Romo, and Assistant Director of Finance, Ed Cabrera, closed the event by thanking the management team for their generosity and support in funding the breakfast event.

For more information about the Office of Finance, please go to www.finance.lacity.org.

The following seven honorees were recognized for their outstanding service and above and beyond performance during fiscal year 2013 - 14:

Joel Cortez, Sr. Tax Auditor



Joel Cortez, Sr. Tax Auditor, earned the designation as Employee of the Year for 2014. Mr. Cortez started his employment with the City of Los Angeles, Tax and Permit Division in 2003. With only approximately three years of experience as a Tax Auditor, Mr. Cortez was promoted to Sr. Tax Auditor in 2007. As a Sr. Tax Auditor, Mr. Cortez constantly involved himself with various special projects including assisting in the training of new auditors regarding LATAX and working paper

preparation. Mr. Cortez was part of the core group that developed an office audit manual and provided special training to various Finance public counter staff regarding Statute of Limitations and New Business Exemptions. Mr. Cortez was also the coordinator for the Transient Occupancy Tax audits and has participated on various other special projects including the Internet Based Business and New Business eligibility. Most recently, he received a Letter of Recognition for exemplary service related to his participation on the Voluntary Disclosure Project, which has brought in \$5.1 million for the City. Mr. Cortez prides himself as a training officer and supervises a crew of five Tax Auditors who consistently meet performance standards. For fiscal year 2012-13, his crew was recognized for meeting the goals of the department. Mr. Cortez thanked his mentors Ki Lee, Principal Tax Auditor, and Ed Cabrera, Assistant Director of Finance. He then went to humorously comment on his award, "Finally, something positive to put in my Personnel File."



Nick Shahvaladian, Tax Compliance Officer II



Nick Shahvaladian, Tax Compliance Officer II, was recognized for his outstanding commitment and dedication to the City of Los Angeles. Mr. Shahvaladian has also been recognized on numerous occasions for his perfect attendance. Mr. Shahvaladian responds well to the challenges presented to him while working with the public, and has developed a strong work ethic. Mr. Shahvaladian has been commended by taxpayers as a wonderful customer service representative. Christine Smith, Tax Compliance Officer III, highlighted Mr. Shahvaladian's 25 years with the Department, describing it as a "milestone." Ms. Smith also highlighted the amazing fact that they have a "combined 60 years' experience." It was truly a heartfelt

experience for Mr. Shahvaladian, as he was initially speechless upon receiving his award. He thanked everyone for the honor and described the award as "a once in a lifetime achievement."

Edwina Thompson, Principal Clerk



Edwina Thompson, Principal Clerk, oversees the Refund Unit and despite losing support staff, handles the high volume of refund requests the unit receives every day. Her expert knowledge of the business tax ordinance is essential when assisting the audit staff with case-related refunds, as well as attending to taxpayers' refund inquiries. Ms. Thompson also plays a crucial role in carefully monitoring and ensuring the timely and expeditious processing of the \$50,000 and above refund requests approved by Council and the mayor. During the 2014 renewal season, Ms. Thompson assisted the Renewal Processing Unit by calmly addressing various incoming calls regarding online renewal credit card payments. She coordinated

with Finance's credit card vendor in identifying and reversing erroneous overpayments made by account cardholders. Ms. Thompson has proven to be an invaluable employee to Finance, as the department depends on her to be the foremost authority on refunds. She possesses a great work ethic and excellent customer service skills. She was previously nominated for an Outstanding Service Award back in 2005. Her dedication to the department and to public service truly makes her deserving of the outstanding service award. Deborah Bates-Johnson, Fiscal Systems Specialist, humorously corrected Ms. Christovale's statement that Ms. Thompson functions with limited staff by commenting that Ms. Thompson actually functions as "a staff of one." Ms. Bates-Johnson commended Ms. Thompson on her ability to handle approximately 15,000 refund requests even under her current circumstances. Ms. Thompson ended her acceptance by jokingly asking, "Does a Clerk Typist or Sr. Clerk Typist come with this award?"

Marieta Chong, Sr. Clerk Typist



Marieta Chong, Sr. Clerk Typist, has been an essential factor with the Administrative Tax Lien Program, which was originally implemented in 2010. She has taken a lead role over the program and was integral in the designing of various tracking spreadsheets, including the Revenue Tracking spreadsheet, that are still being used in her division today. These spreadsheets are invaluable in tracking the program's success, and Ms. Chong ensures that they are updated accurately every day. Alicia Vega, Tax Compliance Officer III, describes Ms. Chong as "instrumental in keeping the program running" as well as an employee who "constantly meets multiple deadlines." Ms. Vega concluded her congratulatory remarks towards

Ms. Chong with the following statement: "Without her, we wouldn't have been as successful." Ms. Chong acknowledged being both grateful and surprised, stating, "It is a privilege to work in this department."

Ruchila Perera, Accounting Clerk I



Ruchila Perera, Accounting Clerk I, was recognized for her exceptional work habits and for consistently going above and beyond her required work tasks. Ms. Perera accepts new assignments and responsibilities both willingly and eagerly; Ms. Perera also received praise as a quick learner who is able to easily comprehend new tasks that are being presented to her. Some of her most notable work comes from her ability to process claims from constituents wishing to redeem decades-old bearer bonds. Not only does this task require extensive research and detailed perusal of dated files, but also a high level of patience, accuracy and analytical ability. In addition to handling these claims, she also handles Street

Improvement Bond issues, where customer service is essential. Ms. Perera has proven to be able to proficiently handle irate customers both patiently and professionally. Her supervisor, Maria Pascual, Management Analyst II, stated that she greatly appreciated Ms. Perera's ability to consistently handle customer calls on her own accord.

Veronica Barnett, Treasury Accountant I



Veronica Barnett, Treasury Accountant I, was recognized for the thoroughness of her work as well as her proactive demeanor in executing her duties in the Accounting Division. She has demonstrated an extensive level of analytical ability, accuracy and communication with her various responsibilities pertaining to investment accounting, reporting and system conversions. Her work has been integral in ensuring the fiscal year-end investment reports are finalized correctly under heavy time constraints; for the past five consecutive years, there have been no findings in the external auditor's annual reviews. Ms. Barnett has also helped with the successful conversion of our investment accounting software. Not

only did she contribute extraordinary efforts to completing this project, but she also took the time to create a user manual and cross-train her colleagues. Her knowledge and experience have proven to be invaluable to Finance's Accounting division. Ms. Barnett commented after receiving her award, "I hope to work for many more years to come."

Spiritt Garrett, Acting Principal Clerk



Spiritt Garrett, Acting Principal Clerk, was honored for his consistency in performing his supervisory duties over the Special Desks unit and Call Center. Cindy Sue Serrano, Principal Tax Compliance Officer, described Mr. Garrett's work ethic as admirable, as he requires very minimal supervision and ensures effective customer service. He goes above and beyond to create a more efficient workplace by constantly submitting new methods and ideas to improve current procedures. Mr. Garrett's customer-oriented mindset and positive attitude makes him a great asset within the Customer Service Section. He is able to handle even the most difficult customer issues, all while maintaining a positive image for his department. Not only is he great with the public, but also maintains great rapport with his fellow staff, supervisors, managers and other department representatives. Ms. Christovale supported the previous statements by describing Mr. Garrett as someone who is approachable and has a very pleasant demeanor. After receiving his award, Mr. Garrett thanked his supervisors and the Office of Finance for holding such a ceremony, describing it as "a great morale booster and humbling experience."