



Department Report

Report Title: Finance and Administration Department – April 2025

Report Highlight: Purchasing Agent Brittany Lee successfully navigated federal procurement for our latest TAP project.

Name and Title: Kimberly Stafford, Finance Manager

Recently Completed:

- Compilation of property and easement files
- Transitions property and liability insurance functions to finance from clerk's office.
- Submitted annual ARPA report.
- Cross-training initiative implementation.
- Water/Sewer masterplan data compilation complete as to data we have available.
- Many conversations with grant writers and congressional representatives regarding KOYO Lift Station funds.
- Lead and Copper grant submissions completed thru draw #6.
- Civic Plus Meeting and Agenda software setup ongoing for new platform. Estimate go live is July 2025.
- Began planning work on ROW and property audit.

Underway:

- Inventory module discovery for design and implementation.
- Internal audit of assets – 95% complete
- Establish and set up the Employee Portal on new software; implement and train employees on benefits and use.
- Update employee evaluation forms and document procedures for employee review processes and performance development plans.
- Staff continues to review forms for needed updates.

Near Term:

- Update financial policies.
- Update the purchasing policy to include a vendor preference provision.
- Develop and implement employee meetings to provide appropriate training and update HR forms;
- Review additional finance files in long-term storage to determine what should be destroyed per the retention schedule.
- Audit of Utility Billing address points against MSAG/E911/USPS data.