


**BOARD OF TRUSTEES**

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**Mark Simlar**  
Human Resource Director  
[msimilar@waterfordmi.gov](mailto:msimilar@waterfordmi.gov)

MEMO: October 5, 2020  
TO: Honorable Township Board  
FROM: Mark Simlar, Human Resources Director   
RE: Julie Wallis promotion to Staff Analyst – Accounting Coordinator

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At the September 9, 2020 Township Board meeting the Board approved the position of Staff Analyst-Accounting Coordinator.

Kim Markee, Barb Miller and myself conducted interviews on 09/28/2020 and selected Julie Wallis to be promoted to this position.

Julie has been with the Township since 2013. (Resume attached)

It is my recommendation that the Board approve promoting Julie Wallis to the position of Staff Analyst – Accounting Coordinator.

This position is a Grade 4, Step 5 - \$56,277/yr.

**Objective**

To work in a position that will utilize my skills, talents and experience. To be a team-member working toward accomplishing goals that will help to strengthen my department and the township.

**Employment History**

**Staff Accountant**

12/2013 to Present Waterford Township

- Accounting – including journal entries (verify, allocate, and post entries to ensure reporting accuracy), reconciliations, analyzation of accounts, accruals, fixed assets, auditing preparations, support of month-end and year-end processes, working with multiple departments to discover discrepancies and best practices to resolve reoccurring issues, provide assistance as required by the Finance manager.
- Purchasing – including correspondence with customers and departments for the purchasing process, releasing PO's, verifying the purchases match with proper PO, adjusting items as required, ordering supplies and assisting departments in finding the products they desire for the best value possible. Following the township procurement policy. Fixed Asset tracking and reporting at year end. Assisting with vendor management. Tracking of vehicle titles and asset management
- Grants – reporting and monitoring for all departments within the township. Coordinating with the departments to accurately state the expenses and revenues with each grant and providing the final report for the submission of the SEFA and audit process.
- Pcard process (also part of purchasing) – set up the new Pcard process to interface Chase bank (Smart Data) with Munis and the procedures to follow to post these purchases correctly into Munis. Document the workflow instructions for the different roles in this process which includes Accounts Payable, Department Aides (or designee), and Accounting.
- Assisted with the organization of current record keeping and preserving of historical files within OnBase.
- Elections – assist the Clerk's office with counting and sorting of applications and ballots
- Projects as requested which has utilized my skills with learning new software, implementing new procedures and writing work instructions.

**Office Manager/Accountant**

7/2000 to 8/2012 OMEGA Productive Services, Inc. , Auburn Hills, Michigan

- Bookkeeping (full-charge), accounts payable, accounts receivable, payroll, ISO team management member, administrative secretary, office supply inventory, purchasing, job cost tracking/reporting, coordination of travel, human resource support, management of handbook, associate editor for quarterly newsletter, web-site management
- Purchasing – office supply management and setting up new vendor contracts with pricing and value that would benefit the company.
- Successful implementation/management of ISO 9001:2000 & ISO 9001:2008
- Creation/management of library containing all project binders.

**Care Giver**

11/2009 to 5/2012 ARC/MORC of Oakland County, Private family

- Working with 12 year old autistic boy – teaching daily living skills, speech, sign language, and community appropriate behaviors.

**Office Manager**

10/1989 to 7/2000 Amie's Discount Tire & Service Centers, 5 Locations in Michigan

- Bookkeeping (full-charge), payroll (commissions/straight time), accounts receivable, accounts payable, personnel records, filing, words, customer relations, data entry, inventory, purchasing, daily bank deposits. Supervisor of 2 individuals within the department.

**References**

(available upon request)

## **Bookkeeper**

4/1986 to 10/1989 S & S Tire Center, Waterford, Michigan

(purchased by Arnie's Discount Tire & Service Centers in 1989)

- Bookkeeping

## **Education**

Mott Community College, Flint, Michigan 2001 – 2005

- Associate in Applied Science: Interpreter Education (Sign Language)
- Associates in General Studies

Oakland Community College, Auburn Hills, Michigan 2000 – 2001

- Associates in General Studies

Spring Arbor College, Spring Arbor, Michigan 1980 – 1982

- General Education Courses

## **Computer Proficiency**

Munis, OnBase, Microsoft Office 2003/2007/2010 (including: Excel, Word, Access, Power Point, Publisher), G.B.M.S. (Goodyear Business Management System), Peachtree Premium Accounting for Construction 2008, Qulcken, Front Page, type 70+ words/minute. Strong skills in working with new systems to discover how they work and implementing new procedures/writing work instructions.

## **Extra Curricular/Activities**

Current and/or past – Phi Theta Kappa, sign language, youth group volunteer, praise & worship team, missions committee member, karate, Sunday school teacher, librarian, assistant superintendent for Sunday school, motorcycling, hiking, family, sewing, quilting, crafts, coach for girls and co-ed soccer teams, foreign missions trip, and Teens For Christ volunteer leader.