



# COUNTY OF KENOSHA

## OFFICE OF THE COUNTY EXECUTIVE

Samantha Kerkman, County Executive

1010 – 56<sup>th</sup> Street, Third Floor  
Kenosha, Wisconsin 53140  
(262) 653-2600

## ADMINISTRATIVE PROPOSAL

### COUNTY EXECUTIVE APPOINTMENT 2024-16

#### BROOKSIDE BOARD OF TRUSTEES

TO THE HONORABLE KENOSHA COUNTY BOARD OF SUPERVISORS:

Placing special trust in the judgment and based upon the qualifications thereof, I hereby submit to the Honorable Kenosha County Board of Supervisors for its review and approval the name of

David Geertsen  
Somers, WI

to serve a three-year term on the Brookside Board of Trustees beginning immediately upon confirmation of the County Board and continuing until the 1<sup>st</sup> day of January, 2025 or until a successor is appointed by the County Executive and confirmed by the Kenosha County Board of Supervisors.

Mr. Geertsen will serve without pay but will receive a per diem.

Mr. Geertsen will be succeeding John O'Day.

Respectfully submitted this 11<sup>th</sup> day of April, 2024.

Samantha Kerkman  
Kenosha County Executive

COUNTY OF KENOSHA  
OFFICE OF THE COUNTY EXECUTIVE  
SAMANTHA KERKMAN

**APPOINTMENT PROFILE**  
**KENOSHA COUNTY COMMISSIONS, COMMITTEES & BOARDS**

(Please type or print)

*Information marked with an \* will be redacted before this form is publicly posted.*

Name: David M. Geertsen  
First Middle Initial (optional) Last

\*Residence Address: [REDACTED]

Occupation: Kenosha County Supervisor, District 15  
Company Title

\*Business Address: [REDACTED]

\*Telephone Number: Residence [REDACTED] \*Business [REDACTED]

\*Daytime Telephone Number: [REDACTED]

\*Email Address: [REDACTED]

Name of the Commission, Committee or Board for which you are applying:

Brookside Board of Trustees

Personal Statement: Please indicate why you believe you would be a valuable addition to the Commission, Committee or Board for which you are applying. If more space is needed, please attach a separate sheet.

As the former CFO for the County, if appointed to serve, I will work to ensure the sustainability of Brookside, both financial and quality of service. Brookside is an important asset in the County, as this sector of health care has become challenged nationally, impacting quality of life for seniors and others in need of this service.

By maintaining excellence at Brookside, we will provide a valuable asset that will become more rare in other communities. It will be seen as an asset that makes our community more desirable. For example, rating agencies do look at health care when vetting governments. In order to maintain our AAA bond rating, this is one important service that helps to keep our rating.

Kenosha County Commissions, Committees & Boards  
Appointment Profile - Page 2

Additional Information:

See Bio

Nominee's Supervisory District: 15

Special Interests: Indicate organizations or activities in which you have a special interest but may not have been actively involved.

None

Do you or have you done business with any part of Kenosha County Government in the past 5 years? Yes ☐ No ☒ If yes, please attach a detailed explanation.

Affiliations: List affiliations in all service groups, public service organizations, social or charitable groups, labor, business or professional organization, and indicate if it was a board or staff affiliation.

See Bio

Governmental Services: List services with any governmental unit.

See Bio

Conflict Of Interest: It would be inappropriate for you, as a current or prospective appointee, to have a member of your immediate family directly involved with any action that may come under the inquiry or advice of the appointed board, commission, or committee. A committee member declared in conflict would be prohibited from voting on any motion where "direct involvement" had been declared and may result in embarrassment to you and/or Kenosha County.

  
\_\_\_\_\_  
Signature of Nominee

4-4-24  
\_\_\_\_\_  
Date

Please Return To: Kenosha County Executive  
1010 – 56th Street  
Kenosha, WI 53140



## **Bio of David M. (Dave) Geertsen, CPA, CGMA**

### **Currently**

#### *County Board Supervisor, District 15*

District 15 covers most of the Village of Somers, and all of the Town of Somers. It is an elected position. The term is April 2024 through April 2026. Kenosha County is consistently rated as one of the fastest growing counties in the State of Wisconsin. It is rated AAA by Standard and Poor's Global Ratings.

#### *President, Kenosha Community Foundation*

Dave has volunteered or been a board member for KCF for about 25 years. The Foundation is a community philanthropic organization created to receive charitable gifts of any size and create endowment funds whose income is used to advance civic, cultural, educational, health, and welfare causes in Kenosha County. The fund has assets of about \$15mm.

#### *Treasurer, Kenosha Community Health Center*

Dave recently joined KCHC as its Treasurer in March of 2023. KCHC is a critical component of Kenosha County's health services network, its mission statement is to "provide patient-centered, integrated health care with excellence in access, quality, and service for everyone."

#### *Shalom Center, Advisory Audit Committee*

Dave has served on this committee for about 6 years. The Committee reviews all matters relative to the audit, and makes recommendations to the Board. The Shalom Center is a 501(c)3 organization. The Shalom Center's mission is to serve the community through food, shelter, and supportive ways. Shalom Center provides shelter to the homeless. It also has other programs, such as a food pantry, and a nightly meal program.

### **Past Affiliations and Professional Experience**

#### **Kenosha County**

##### Former CFO, Finance Director (1988 to 2018)

Served as Chief Financial Officer for Kenosha County. As CFO, I served on the County Executive's cabinet. I developed the financial strategies, framework and policies necessary for the County to achieve a AAA bond rating in 2020. I reported directly to the County Executive and was the liaison to the County Board Finance Committee. In my administrative roll, I planned and coordinated the fiscal component of projects undertaken by the County and issued over \$300mm in capital financing. In addition to this administrative responsibility, I had oversight of Financial, Information Technology, and Purchasing functions of the County. Responsibilities included: development and oversight of a \$250 million annual budget and Capital Improvements Program; preparation of general purpose financial statements; cash flow and investment planning; management of cash handling, banking, and internal control systems; management of the capital planning and financing program; development of the County investment program; development, implementation, and maintenance of all fiscal IT systems; supervision of payroll functions.

##### Village of Somers Trustee (2015-2020)

As a Trustee for the Village of Somers, I worked to adopt policies that improved the financial condition of the Village. The Village had the lowest bond rating of any rated municipality in the State of Wisconsin. After implementation of the plans and procedures, the Village achieved a bond rating of AA-. As a volunteer for the Village, I was member of the Committee to Incorporate. The

Village successfully incorporated in 2015. Also as a volunteer, I prepared and presented to the Town Board an Economic Development strategic plan and SWOT analysis that helped to achieve the establishment of the first Industrial Park in the Village.

#### Trustee, State of Wisconsin Investment Board (2003-2011)

The State of Wisconsin Investment Board (SWIB), is responsible for managing the assets of the Wisconsin Retirement System (WRS), the State Investment Fund (SIF), and other state trust funds. Total assets exceed \$140 billion. As a Trustee, I developed financial, investment, and strategic policy for SWIB. I chaired the benchmark committee, and served on the finance committee. I participated in a strategic plan that resulted in the consolidation of the equities, fixed, and alternative investments portfolios under one Chief Investment Officer. SWIB is the investment arm of the Wisconsin Retirement System, which is consistently ranked as one of the most stable public retirement systems globally.

#### Interim Director, Information Systems (1991-1993; 2009-2011)

Supervised IT staff while coordinating the development of two IT strategic plans for the County. The Strategic plans included determining whether to privatize the Department and what platform was best suited for the future development of County systems. The 2011 strategic plan developed a new organizational strategic and long term strategy that is still in use today.

#### Assistant Finance Director (1987-1988)

Reported to Finance Director. Assisted with the conversion from manual to automated general ledger, created budget process, automated manual budget development process, developed centralized personnel costing system for budgeting and union contract costing.

#### Business Services Coordinator (1985-1987)

Within the Department of Community Programs, coordinated annual audit, automated manual ledger system, coordinated fiscal management of the Department with various contracted providers.

### **State of Wisconsin**

#### Auditor, Department of Health and Social Services (1978-1985)

Planned, supervised, and conducted compliance audits of Counties, Cities, Hospitals, and non-profits.

### **Education**

BS with Specialties in Accounting and Personnel, University of Wisconsin Parkside, 1978; CPA, 1984; attended UW Madison (CPA review and a variety of other classes) and UW Milwaukee (Geology classes).

### **Affiliations and Awards**

Member, AICPA, WICPA, Government Finance Officers Association; Past President of Kenosha County Sunrise Rotary Club; Board of Directors Kenosha Area Chamber of Commerce; Past Treasurer, Armitage Academy; Outstanding CPA in government; KABA Community Service Award; Chamber of Commerce Community Service Award; formerly served on: KABA audit committee, Village of Somers Incorporation Committee, and Village of Somers Board of Review of Assessments.