



SAN RAFAEL CITY COUNCIL STAFF REPORT

Department: City Clerk

Prepared by: Lindsay Lara, City Clerk

City Manager Approval: _____

TOPIC: PLANNING COMMISSION INTERVIEWS

SUBJECT: INTERVIEW APPLICANTS AND MAKE AN APPOINTMENT TO FILL ONE UNEXPIRED FOUR-YEAR TERM TO THE END OF JUNE 2022 ON THE PLANNING COMMISSION DUE TO THE RESIGNATION OF ELIAS HILL

RECOMMENDATION:

Interview the following applicants and make appointments to fill one unexpired four-year term to the end of June 2022 on the Planning Commission.

Name
Anthony Psychoyos
Camille Harris
Denis Avdic
Esme Octavia Lazarre
John Kakinuki
Jon Haveman
Stephen Roth

BACKGROUND:

At the meeting of January 26, 2021, the City Council appointed Planning Commissioner Elias Hill to the office of City Councilmember, which created a vacancy on the San Rafael Planning Commission.

The [Planning Commission](#) consists of seven citizen volunteers appointed to four-year terms by the City Council to make decisions or advise the City Council on land use and property development issues. The Commission assures that new development is consistent with the City's long-range General Plan, State laws and other public policies that advance the interests of the community. [Meetings](#) are held on the second and fourth Tuesday of each month at 7:00 p.m. in the San Rafael Council Chambers, 1400 Fifth

FOR CITY CLERK ONLY

Council Meeting:

Disposition:

SAN RAFAEL CITY COUNCIL AGENDA REPORT / Page: 2

Avenue, San Rafael, CA 94901; however, due to COVID-19 the Planning Commission is meeting virtually until meetings resume in-person.

ANALYSIS:

The deadline for submitting applications was February 17, 2021 and was left open until filled to receive additional applications. The City Clerk's Office received seven (7) applications. Staff recommends the City Council interview the seven (7) eligible applicants and make an appointment to fill the one unexpired term.

FISCAL IMPACT: There is no fiscal impact associated with this item.

COMMUNITY OUTREACH:

The call for applications for the Planning Commission was advertised through mass email notification, Canal Alliance, the City website, Nextdoor and Facebook social media platforms.

RECOMMENDED ACTION:

Interview the seven applicants and make an appointment to fill one unexpired four-year term to the end of June 2022 on the Planning Commission.

ATTACHMENT:

1. Seven (7) Applications
2. Planning Commission Municipal Code Section 2.16.040

#5

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, March 03, 2021 10:03:11 AM
Last Modified: Wednesday, March 03, 2021 10:16:11 AM
Time Spent: 00:12:59
IP Address: 73.162.54.207

Page 1

Q1

Contact Information

First and Last Name	Anthony Psychoyos
Address	[REDACTED]
City/Town	San Rafael
State/Province	California
ZIP/Postal Code	94901
Email Address	[REDACTED]
Phone Number	[REDACTED]

Q2

Planning Commission

What Board would you like to apply to?

Page 3

Q6

How long have you lived in San Rafael?

27 years

Q7

Business Information

Company	Retired
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Q8

How did you hear about this vacant position?

Other (please specify):

One of the supervisors saw my application for supervisor and asked me to apply

Q9

Do you participate in any civic activities? If so, what are they?

Former President of Canal Alliance, Board member of Community Action Marin

Q10

List any civic organizations of which you are a member:

Canal Alliance, Community Action Marin

Q11

Education:

BBA, College of William and Mary. MBA UC Berkeley Haas School of Business

Q12

Why are you interested in serving on a board or commission?

I want to be a positive stakeholder in my community

Q13

Describe possible areas in which you may have a conflict of interest with the City:

Participation with Community Action Marin?

Q14

Upload your resume.

Tony Psychoyos cv.pdf (94.4KB)

Page 4: Demographics

Q15

Ethnicity

[REDACTED]

Q16

To which gender do you most identify?

[REDACTED]

Q17

How old are you?

[REDACTED]

Tony Psychoyos



Bay Area Executive with solid background in key areas of corporate finance, strategic planning and financial planning and analysis. A Berkeley MBA, with proven team leadership in measuring, tracking, analyzing and adhering to strategic and operational initiatives

Vice President, Financial Planning and Analysis, New York Stock Exchange (NYSE

Euronext) Feb 2013 to April 2014 Responsible for the Financial, Planning and Analysis of the Options division of NYSE Euronext. Reporting to Senior , Executive VP Finance, main responsibilities include:

- Responsible for all forward-looking financial analyses of division. Scope included strategic analysis, ROI on technology initiatives and IRR on strategic partnerships.
- Managed the budget, variance, and management reporting of the options line of business.
- Led cost cutting initiatives, revenue enhancement efforts for division generation over \$160 million in operating profit.
- Developed, implemented and maintained dashboard reporting of key initiatives

Director, Finance, New York Stock Exchange (NYSE Euronext) Sept 2005 to Jan 2013

- Ensured strategic acquisitions were compliant with financial performance expectations.
- Outlined strategic direction, revenue and expense forecasts of operational efforts and new endeavors. Quantified revenue/expense impact of strategic initiatives.
- Oversaw development and adherence to operating budget for division generating \$210 million in revenues and \$50 million in operating expenses.

Vice President, Finance, Pacific Exchange (PCX) June 2000 to September 2005 Responsible for the Corporate Finance function of the Pacific Stock and Options Exchange. Reporting to CFO and managing 7 staff members, main responsibilities included:

- Responsible for the financial forecasting/reporting of the Exchange
- Responsible for the overall direction of all budgeting, forecasting, management reporting, strategic planning and quantitative analysis of the corporation.
- Overseeing, developing and presenting the financial planning and analysis initiatives of the company. Efforts and areas of focus encompass financial reporting, cash and profitability forecasts, performance statistics and new product pricing.

Manager, Finance, Pricing and Competitive Analysis, PCX August 1997 to June 2000 Lead the financial planning and analysis efforts of the company; tracked, analyzed and reviewed the competitive landscape of corporation. While reporting to Senior VP of Finance main responsibilities included:

- Responsible for all facets of the budget process. Developed, tracked and presented performance metrics of the company; formulated and represented standards for financial performance.
- Responsible for the analytical support related to new product pricing and competitive review.
- Provided leadership in analyzing and implementing process improvement and cost reduction initiatives.

- Prioritized, key information technology projects. Acted as Technology liaison and as project leader in the development efforts of the information and financial reporting system.

Senior Financial Analyst(August 1992 to August 1997), Under general direction from the VP of Finance

- Planned, and oversaw the capital and operating budget process for the Exchange.
- Managed the day to day treasury functions(\$20 to \$40 million in cash) of the Exchange.
- Formulated,presented and maintained the cash and profitability forecasts.

***University of California at Berkeley, MBA ·College of William and Mary, BBA· ·Bilingual:
English/Spanish***

***Past President of the Board and Executive Committee member Canal Alliance. Current
Board Member, Community Action Marin.***

#2

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, February 04, 2021 2:17:16 PM
Last Modified: Friday, February 05, 2021 7:12:27 AM
Time Spent: 16:55:10
IP Address: 205.169.52.117

Page 1

Q1

Contact Information

First and Last Name	CAMILLE HARRIS
Address	[REDACTED]
City/Town	SAN RAFAEL
State/Province	CA
ZIP/Postal Code	94901
Email Address	[REDACTED]
Phone Number	[REDACTED]

Q2

What Board would you like to apply to?

Measure E Transaction and Use Tax Oversight Committee
,
Planning Commission

Page 3

Q6

How long have you lived in San Rafael?

OFF AND ON FOR 9 YEARS

Q7

Business Information

Respondent skipped this question

Q8

How did you hear about this vacant position?

Other (please specify):
Lindsay Lara

Q9

Do you participate in any civic activities? If so, what are they?

Yes - I'm an ambassador for my MBA program

Q10

List any civic organizations of which you are a member:

n/a

Q11

Education:

B.S. from University of Maryland, College Park
In progress MBA from University of California, Davis

Q12

Why are you interested in serving on a board or commission?

I would love to be more active in the community I love so much.

Q13

Describe possible areas in which you may have a conflict of interest with the City:

None that I can think of

Q14

Upload your resume.

Camille Harris _ 2021 _ Resume.pdf (164.9KB)

Page 4: Demographics

Q15

Ethnicity

[REDACTED]

Q16

To which gender do you most identify?

[REDACTED]

Q17



How old are you?

PROFILE

Creative & Strategically-Minded Entrepreneur with over a decade of varied marketing, human resources, and operations experience. Seeking a Marketing position to fully utilize passion for marketing, employee engagement, and process improvement, and merge with a BS in Marketing and MBA curriculum focused on Analytics, Marketing, and Strategy.

Specialties: Marketing Project Management, Content Management, Marketing Campaigns, A/B Testing, Process Improvement, Strategic Planning, Change Management, HRIS, Cross-Functional Collaboration, Performance Management, Interpersonal Communication, Coaching, Training, Corporate Communications

Technologies: MS Office, Advanced Excel (Charts, Formulas, Pivot Tables, Macros, Graphs), Adobe Suite, Outreach IO

EDUCATION

Master of Business Administration, (STEM Designated), Emphases: Analytics, Marketing, and Strategy, Expected June 2022

University of California Davis, Graduate School of Management

- **Relevant Courses:** Marketing Management, Markets & The Firm, Digital Marketing, Marketing Strategy, Marketing Research, Customer Relationship Management, Power & Influence in Management, Data Analysis for Managers

Bachelor of Science, Marketing & International Business, 2007

University of Maryland, College Park

ENTREPRENEURSHIP, PEOPLE OPERATIONS, & MARKETING EXPERIENCE

Principal, Symbiotic Consulting LLC, Sacramento, CA, May 2020 – Present

- Provide holistic, strengths-based coaching to creative professionals and entrepreneurs.
- Build trusting relationships with clients in service of co-creating a safe and supportive coaching environment.
- Utilize ICF Core Competencies to partner with clients in a process that inspires them to maximize their personal and professional potential.

People Operations Specialist, Mattermost, Inc., San Francisco, CA, September 2017 – March 2020

- Grew fully remote team by over 300% including assisting with 3 confidential executive searches by collaborating with various department heads to assess headcount needs, source candidates, schedule/conduct interviews, and overhaul recruitment documentation with a marketing perspective.
- Marketed culture development, addressing staff inquiries related to company policies, resources, and culture fit.
- Supported Administrative team in planning and executing annual on-site, MatterCon, including assisting with preparation of immigration letters and collaborating with vendors.
- Spearheaded and managed a comprehensive remote on-boarding program (from Day 0 to 90), including management of Bamboo HR, team calendar, and other tools.
- Coordinated all staff off-boarding, consistently maintaining utmost confidentiality for all departing staff members.

CONTENT MARKETING & TECH PROJECT MANAGEMENT EXPERIENCE

Project Coordinator, Judicata, Inc., San Francisco, CA, February 2016 – July 2017

- Created and oversaw outbound Marketing Campaigns. Identified qualified leads, targeted marketing campaigns for various audiences, developed email subject/message copy, tested A/B content based on KPI's, & utilized the Outreach.io marketing platform resulting in the successful on-boarding of 1000s of new customers through email marketing.
- Led project oversight for legal technology company providing research and analytics tools. Reviewed case law to ensure the accuracy of software to read and analyze legal briefs, communicated with end-users to understand product preferences, and presented findings to Product Managers, Engineers, and Executives.
- Led office management procedures to support day to day operations, answered and directed incoming phone calls, oversaw outbound correspondence, maintained financial records, and reviewed P&L statements.

Content Moderator, HubPages, Inc., San Francisco, CA, April 2011 – December 2018

- Oversaw issues related to ad placement, content management, and site bugs. Provided technical support to site contributors and users and addressed user inquiries related to moderation decisions and content policies.
- Led review and approval of 1000s of user-generated articles for web publishing site, edited user-submitted questions, and author-generated answers. Reviewed content for compliance with ad-partner policies and worked with content creators to interpret and adhere to site rules and regulations.
- Partnered with remote team to maintain adherence to moderation standards. Contributed to development and implementation of policies. Trained new team members on updated procedures & assessed performance/decisions.

COMMUNITY SERVICE

Masks for Docs, People Operations Lead, Sacramento, CA

Be the Match, Volunteer, Oakland, CA

#6

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, March 10, 2021 11:51:04 PM
Last Modified: Thursday, March 11, 2021 10:11:01 PM
Time Spent: 22:19:56
IP Address: 24.5.25.64

Page 1

Q1

Contact Information

First and Last Name	Denis Avdic
Address	[REDACTED]
Address 2	[REDACTED]
City/Town	San Rafael
State/Province	CA
ZIP/Postal Code	94901
Email Address	[REDACTED]
Phone Number	[REDACTED]

Q2

Planning Commission

What Board would you like to apply to?

Page 3

Q6

How long have you lived in San Rafael?

4 years

Q7

Business Information

Company	LA Solar Group
Address	16238 Raymer Avenue Suite B
City/Town	Los Angeles
ZIP/Postal Code	91406

Boards and Commissions Application

Q8

How did you hear about this vacant position?

Other (please specify):

City Council Vacancy

Q9

Do you participate in any civic activities? If so, what are they?

I have maintained a "volunteering/service" quota each year since I was 14 and have had a daily min. minimum average. I spend the majority of the time tutoring and preparing students for standardized tests from the less affluent community I grew up in.

Q10

List any civic organizations of which you are a member:

Founding Member of the Women in Leadership Alumni Club and Chinese Americans Citizens Alliance (Sac.)

Q11

Education:

Utica College of Syracuse University (Biochemistry / Biophysics)

Cedars Sinai Medical Center, Los Angeles (Nano-Particle Synthesis and Functionalization in Metabolic Imaging)

Hult Business School (Project Management)

Q12

Why are you interested in serving on a board or commission?

I have attached my personal leadership philosophy below, I think that may answer this question very well.

"

As an individual, I have had both the privilege and misfortune of surviving/ living through some of the more turbulent events over the past few decades, and resultantly have had an intimate experience with the meaning of leadership under the harshest of circumstances. One permeating realization throughout the time I've had the opportunity to observe "leadership" in various environments, be it a war zone or a conference room, is that the circumstances (or surrounding reality) has never defined what leadership should look like. Although wide-spanning, I have always been a firm believer that there are a universal set of traits which we can nurture within ourselves and our surroundings which can create an environment that is "leadership". In other words, leadership is not a characteristic, it is certainly not an individual who manifests a set of traits, but rather an environment that is created by a group of individuals with a common goal that produces a greater output than the sum of it's parts in every conceivable metric, from happiness to productivity, to satisfaction.

As a result, the central piece of my leadership philosophy revolves around servitude to the individuals around me. I believe that it is my role to help create an environment of leadership through service from a professional, emotional, and personal standpoint. From a philosophical standpoint, my goal is to foster and build an environment of "leadership", and if I and we are successful, anyone who becomes a part of that environment will undoubtedly become a leader themselves.

In order to lay foundation for this environment, I hold myself (and all others around me) to the highest standards when it comes to honesty and integrity. These values cannot be limited to our professional lives, but rather need to be focused on in every aspect of our being; I have jokingly said that even in our dreams these two things can never leave us. Honesty and integrity allow me to serve my team and our shared environment in the most effective and fulfilling way. With "leadership" being an environment that is created, dishonesty and a lack of integrity are truly devastating because they have the potential to lay a false foundation and create circumstances that can take a very long time to correct, if able to correct them at all.

In addition, I consider it my responsibility to create a culture and environment of personal/ professional empathy, so that there is a foundation for a true learning team culture. Often times groups seek a "learning culture" without realizing that such an environment is the manifestation of a culture based in empathy and servitude.

Ultimately, if I am able to aid in creating an environment that encourages honest communication, I am able to serve my teammates in ways which will yield the highest satisfaction and results. This will in turn drive the interdependence and interpersonal vulnerability that is present in every high performing team.

With my leadership philosophy, success is not based on my achievements (or the team's achievements for that matter), but rather on building up individuals to the point where they have

"

Q13

Describe possible areas in which you may have a conflict of interest with the City:

N/A

Q14

Upload your resume.

Denis Avdic CV .pdf (114KB)

Boards and Commissions Application

Q15

Ethnicity

[REDACTED]

Q16

To which gender do you most identify?

[REDACTED]

Q17

How old are you?

[REDACTED]

Denis Avdic

██████████, United States • 3 ██████████ •
<https://www.linkedin.com/in/denis-avdic/>

Work experience

- 10/2018 – 01/2019

Associate Store Manager
Tesla Inc., Burlingame, United States
Developed and Oversaw a team of 11 people in a unique Tesla location with the goal of leveraging the novelty into a significant competitive advantage.

 - Designed novel pilot program focusing on an untapped sales funnel that has launched nationally and currently accounts for ~20% of total revenue in the energy funnel nation-wide
 - Oversaw the development of 3 pilot programs, 2 of which were launched nationwide
 - Led the development of silo-wide manager training program for standardization and implementation of national pilots.
 - 600%+ Increase in new energy orders month to month
- 02/2018 – 10/2018

Energy Manager
Tesla Inc., San Francisco and Burlingame, United States
Entrusted with over two lowest performing teams in the region with the clear direction to turn-around or reduce team.

 - 310% Increase (avg. between 2 teams) in KPIs from the territory within the first 4 weeks of taking over.
 - Ranked top 2 in sales nationwide within 4 weeks of taking over.
 - Saved 4 positions between two teams based on 1st months results
 - Drove contract pull through from 19% to twice the company average to 89%
 - Managed contracts worth 10 million + in revenue.
 - Maintained an average team monthly performance at >130% of quota
 - Developed Team Development Plan which was rolled out company wide to increase: communication, cross-functionality, and production through coaching and "soft" skill development.
- 01/2016 – 02/2018

Territory and Business Development (FE) Advisor
Tesla Inc., Napa/ Sonoma County, United States
Executed the development of the Napa/ Sonoma territory for Tesla Energy, taking the region from near-worst to first in Northern California in revenue within 6 months.

 - 540% Increase in revenue from the territory within the first 6 months of taking over.
 - Ranked top 5 in sales nationwide for both quarters.
 - Leveraged brand recognition to develop partnerships with big-box retailers to drive client development
 - Managed, closed and negotiated contracts worth 3 million in revenue.
 - Maintained an average monthly performance at >170% of quota
 - Generated over 80 new accounts in the first 9 months of employment.
- 01/2016 – 02/2018

Managing Country Director
Healfies Inc., San Francisco, United States
Developed a standardized expansion template for N. America and successfully began the implementation in the United States.

 - Fully responsible for establishment and growth of US team, 200% growth in team size.
 - Fully responsible for client growth development of US team, 39 new clients to date
 - Personally sought, developed, closed and managed 85% of US revenue
 - Navigated Federal, State, and HIPAA regulations in order to maintain UVP and competitive advantage.
 - Spearheaded overhaul of company best practices, leading to significantly increased customer satisfaction and retention rates
 - Launched novel program to identify and celebrate users and customers, in addition to an activity/collaboration tracking system that awarded creativity and encouraged internal mobility.
- 09/2014 – 05/2016

National Recruiting (Sales) Director
National Collegiate Scouting Association, Chicago, United States
Led multiple high-performing sales teams for the Western region to success in recruiting prospective athletes – football players ages 14-18.

 - Directed team market research on demographics and psychographics of customers to modify sales techniques
 - Conducted quantitative and qualitative analysis of primary market research to develop future sales strategies
 - Ranked between #1 and #3 in sales nationwide.
 - Managed, closed and negotiated contracts worth ~\$2.6 million in revenue.
 - Maintained an average monthly performance at 194% of quota
 - Generated over 400 new accounts in the first year of employment.
 - Led training series with VPs and teams to develop more efficient sales techniques

Work experience

- 07/2011 – 08/2014

 - company-wide.
 - Created a webinar series formalizing my sales techniques for engaging new clients, launched company-wide.
- Doctoral Candidate / Imaging Core Lab-Team Leader (Nanoparticle synthesis and functionalization)**
Cedars-Sinai Medical Center, Los Angeles, United States
 Built and oversaw a team of eight researches and doctoral candidates.

 - Led the first functional nanoparticle hyperpolarization at the medical center, one of a dozen institutions worldwide
 - Developed a novel nanoparticle functionalization process using Silica NPs and a novel HER-PbK10 protein for translational applications in early stage cancer imaging.
 - Led cross functional, cross-laboratory, team and coordinated the project that accounted for over a third of the laboratory's resources resulting in two publications.
 - Analyzed and troubleshot the early performance of the nano-complex and the nano-complex synthesis protocol.
 - Mentored team members on nano-complex analysis and coached independent project management.

Education

- 07/2016 – 08/2017

 - M.B.A. (Project Management)**
Hult Business School, San Francisco, United States
- 07/2011 – 08/2014

 - Ph.D. (Nanoparticle Synthesis and Functionalization in Metabolic Imaging)**
Cedars-Sinai Medical Center, Los Angeles, United States
- 08/2007 – 05/2011

 - B.S. (Chemistry – Biochemistry)**
Utica College of Syracuse University, Utica, United States

Skills

Languages

Serbo-Croatian	●●●●●●
Bosnian	●●●●●●
English	●●●●●●
Slovenian	●●●○○○

Proficiencies

Coaching	●●●●●●
Personal/ Team Development Planning	●●●●●●
Client and Partner Relationship Mgmt.	●●●●●●
Strategic Prospecting	●●●●●○

Achievements

- 2008 – **Discovery of CACNb1 Cardiac Gene** – Masonic Medical Research Laboratory (Utica, NY,USA) –9th known gene related to cardiac arrhythmia and Long QT Syndrome
- 2004 – **Bronze Medal** – *Tokyo Goodwill Games* (Tokyo, Japan) – US National Team (Karate)
- 2002/2003 – **Gold Medal** – *Junior Olympic Games* (Detroit, MI, USA) – US National Team (Karate)
- 2002 – **Gold Medal** – *US Karate National Championships* (Salt Lake City, UT, USA)

Hobbies



Skydiving



Coaching/ Teaching
Karate, Soccer, and
Basketball



Chemistry



Student Mentorship



SPCA Humane
Society

#7

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, March 17, 2021 10:48:44 AM
Last Modified: Wednesday, March 17, 2021 11:42:31 AM
Time Spent: 00:53:46
IP Address: 174.194.202.119

Page 1

Q1

Contact Information

First and Last Name	Esme Octavia Lazarre
Address	[REDACTED]
City/Town	San Rafael
State/Province	Ca
ZIP/Postal Code	94901
Email Address	[REDACTED]
Phone Number	[REDACTED]

Q2

Planning Commission

What Board would you like to apply to?

Page 3

Q6

How long have you lived in San Rafael?

Off and on since 1972. Most recently for 3.2 years

Q7

Business Information

Company	N/A
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Q8

City Council Agenda

How did you hear about this vacant position?

Q9

Do you participate in any civic activities? If so, what are they?

I am a volunteer tutor. I am currently applying to expand opportunities to serve through 10,000 degrees. I have regularly volunteered in the past to assist at a SF Marin Food Bank distribution point located on the College of Marin Campus.

Q10

List any civic organizations of which you are a member:

I am a member of West Angeles Church of God in Christ. The Bishop was recently featured on PBS' "The Black Church". It's an inspiring community and I identify with the struggles of the members there and am inspired by the joy celebrated. I have attended local spiritual organizations pre-pandemic but have not found a community which meets my needs as of yet and as currently most places of worship are still closed my search has been interrupted. My spiritual beliefs inform my desire to be involved in public service, but in no way have imparted in me a desire to use public service to communicate my beliefs to others.

I am also working with several other San Rafael community members to create and grow a dedicated task force dedicated to reducing incidents of, as well as the negative effects caused by, property crime. As a victim of several property crimes, including vehicle theft, I place a high value on the safety and sanity of the community, which should be able to sleep at night knowing that they are not being preyed upon by opportunists. I say that with full empathy for those on the short end of growing economic disparities, however theft is not the answer to address those inequities and in many instances, those who can least afford it are the ones who are victims of such crimes. I serve on the Marina Committee with Paul Jensen our Community Development Director, Pat our Harbormaster, the manager of the Loch Lomond Yacht Club, Strand and Loch Lomond residents and other community members who confer with BCDC and the developers as well as the new owners of the Marina. I understand that Paul is retiring but that we will still have his support and expertise available to us on that committee and I am much relieved by that news. He is a real asset and such a pleasure for everyone to work with.

Q11

Education:

High School : Marin Academy

College: Smith College

Concentration:

History/Political Economy

Graduate school: Middlebury Institute of International studies (completed one year and one summer)

Concentration : Terrorism/International Security

Minor Concentration: Nuclear Non Proliferation

Design and Continuing Education: Central St Martin's, UCLA extension, LA Trade Tech, Otis College of Art and Design, ArtCenter

College of Art and Design, College of Marin and more....

Q12

Why are you interested in serving on a board or commission?

I am interested to serve on the planning commission to make sure community interests in development are successfully pursued and with sustainability, equity and best practices in mind. I would also like to deepen my understanding of local issues surrounding climate change, affordable housing, historic preservation and others found in the Downtown Precise Plan and General Plan 2040 so that I may be of further service in the future as we prepare for changes and work to build up our community post pandemic.

Q13

Describe possible areas in which you may have a conflict of interest with the City:

None that I can think of.

Q14

Respondent skipped this question

Upload your resume.

Page 4: Demographics

Q15

Ethnicity

[Redacted]

Q16

To which gender do you most identify?

[Redacted]

Q17

How old are you?

[Redacted]

#3

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, February 24, 2021 10:02:14 AM
Last Modified: Wednesday, February 24, 2021 10:33:00 AM
Time Spent: 00:30:45
IP Address: 73.202.166.197

Page 1

Q1

Contact Information

First and Last Name	John Kakinuki
Address	████████████████████
City/Town	San Rafael
State/Province	CA
ZIP/Postal Code	94903
Email Address	████████████████████
Phone Number	██████████

Q2

Planning Commission

What Board would you like to apply to?

Page 3

Q6

How long have you lived in San Rafael?

10-1/2 years

Q7

Business Information

Company	Kakinuki Law Office, PC
Address	1050 Northgate Dr, Ste 270
City/Town	SAN RAFAEL
ZIP/Postal Code	949032574

Boards and Commissions Application

Q8 Other (please specify):
How did you hear about this vacant position? Mayor and City Clerk's offices

Q9
Do you participate in any civic activities? If so, what are they?

I attended Marin County Board of Supervisors meetings on March 21, 2017, and May 9, 2017.
As a second generation immigrant and an officer serving with many immigrants in the U.S. military, I spoke in support of (a) the Resolution Protecting Civil Rights of Immigrants and (b) Senate Bill 54 of 2017.
I am a Lector at St. Isabella's Church. Until it became inactive due to the Pandemic, I was a Parish Council member for several years. I also trained the Altar Servers from 2011 to 2014, and I periodically help train new Lectors.
I assisted coaching various Dixie Terra Linda Little League (now called Gallinas Valley LL) teams: the Giants, the Pirates and the Cardinals, from 2011 to 2013.
I am a Judge Advocate (JAG) detached to the CA Army National Guard's 1-143 Field Artillery.

Q10
List any civic organizations of which you are a member:

American Legion Wilkins Post 37; National Guard Association of the United States (NGAUS); State Guard Association of the United States (SGAUS); Judge Advocates Association of America; Military Officers Association of America; Japanese American Veterans Association; American, San Francisco and Marin County Bar Associations; Marin County Superior Court Panel of Discovery Facilitators; American Intellectual Property Law and International Trademark Associations; International Association for the Protection of Intellectual Property (AIPPI) – U.S. Division; Japan Commercial Arbitration Association's Panel of Arbitrators; U.S.-Japan Council; Japanese American Citizens League

Q11
Education:

1974-1977: UC Berkeley (transferred before graduating)
1977-1979: International Christian University (Tokyo), BA
1981-1984: UC Hastings College of the Law, JD
2001: Northwestern University Kellogg Graduate School of Management, EMBA

Q12

Why are you interested in serving on a board or commission?

I was born and raised in San Francisco, and I started my studies at UC Berkeley, including a course in City Planning. After my father died, I moved to my mother's home country, Japan. I completed my undergraduate studies there, including another course in City Planning, then came back to San Francisco to attend Hastings Law School. I practiced law in Japan for nearly 25 years, and I raised three children there. We decided to move back to San Rafael a decade ago to have our youngest son educated in the U.S. After being educated in the San Rafael schools, he has been accepted at Dominican University with a generous scholarship, so we have strong ties to this community. Besides my civilian practice, I have served for the past decade as a Judge Advocate or JAG in the National Guard, where I am considered the subject matter expert on suing bad faith lenders. One of my proudest accomplishments in life was after the Earthquake, Tsunami and Nuclear Disaster in Japan in March 2011. My wife and youngest son had already moved to San Rafael, but with their support, I voluntarily remained behind to help with the relief efforts. At the recommendations of the late Senator Daniel Inouye and the American Ambassador, I was awarded the U.S. Army Humanitarian Service Medal for my work there, as well as a Commendation from the City of Soma, the site of the nuclear reactor. Now that we have solid roots in San Rafael, I would like to repay this wonderful city by making some sort of contribution to further improving its excellent structure and planning.

Q13

Describe possible areas in which you may have a conflict of interest with the City:

Planning specifically involving Quail Hill Townhouses, as I am a member (but not an official) of its Homeowners Association.

Q14

Upload your resume.

KakinukiJohnCV_(2021-01).pdf (202.4KB)

Page 4: Demographics

Q15

Ethnicity

[Redacted]

Q16

To which gender do you most identify?

[Redacted]

Q17

How old are you?

[Redacted]



EXPERIENCE:

April 2013 – Present KAKINUKI LAW OFFICE, PC

President, Attorney at Law

Principal of law firm focusing on Japanese IP rights held by U.S. entities, U.S. IP rights held by Japanese entities, and U.S. and Japan competition law and regulatory issues. Handling antitrust class action litigation, patent, trademark, design, unfair competition and trade secret disputes, intellectual property and information technology acquisition, licensing and protection, and U.S.-Japan technology transfers, including antitrust, foreign trade control and other regulatory aspects of same. Other matters leveraging extensive experience as trusted advisor to CEOs, CFOs and COOs.

Clients include several U.S. and Japan Fortune 500 corporations, and major U.S. and Japanese law firms seeking specialized advice.

Special Counsel to Reseller Plaintiffs Lead Counsel in the Hard Disk Drive Suspension Assemblies Antitrust Litigation and Special Counsel to Auto Dealer Plaintiffs Lead Counsel in the Auto Parts Antitrust Cases referred to below.

Representative cases during this time: *Hard Disk Drive Suspension Assemblies Antitrust Litigation*, Master File 3:19-md-02918-MMC (N.D. Cal.).
Automotive Parts Antitrust Litigation, Master File 2:12-md-02311-MOB-MKM (E.D. Mich.).

January 2017 – Present CALIFORNIA STATE GUARD (formerly called CSMR)

Major (O4), Judge Advocate

Deputy Chief, Command Legal Services – Team Bravo, Legal Support Command (Jun 2019 – Present); Deputy Chief, Legal Assistance, Legal Support Command (Nov 2017 – May 2019). Detached to 1st Battalion, 143^d Field Artillery Regiment, 79th Infantry Brigade Combat Team, 40th Infantry Division, California Army National Guard (CA ARNG) (Jan 2017 – Present). (Most tasks performed pro bono.)

April 2012 – March 2013 AXA GROUP

Legal Counsel

Legal Counsel in North America, for AXA Group based in Paris. Special projects included Government Relations for AXA Group involving or impacting on operations in Japan, including strategy and approach for discussion and negotiation with officials of Financial Services Agency (FSA), Life Insurance Association of Japan (LIAJ), and key Cabinet and sub-Cabinet members



and other key Diet members, and officials in Brussels, Geneva and Washington, utilizing experience gained as an official of the ACCJ, EBC and within the Japanese Bar.

August 2011 – Dec. 2016 CALIFORNIA STATE MILITARY RESERVE (CSMR)

Major (O4), Judge Advocate (Mar. 2016 – Dec. 2016)

Captain (O3), Judge Advocate (Aug. 2011 – Feb. 2016)

Officer in Charge (OIC), Team Alpha (Northern California court-martial appellate defense unit), CSMR Trial Defense Service (TDS) AUG DET, 629th JAG DET, California Army National Guard (CA ARNG). (Most tasks performed pro bono.)

July 2011 – March 2012 AXA ROSENBERG GROUP LLC (“AXAR”) and AXA INVESTMENT MANAGERS, INC. (“AXA-IM”)

**General Counsel, Head of Global Legal & Compliance (AXAR)
Legal Counsel (AXA-IM)**

Managed and supervised all tasks by Legal and Compliance personnel of AXAR and its affiliates in Orinda, CA, and by Legal and Compliance personnel of AXAR’s subsidiaries in London, Tokyo, Singapore and Hong Kong. Successfully concluded investigations by Securities and Exchange Commission, Department of Labor’s Employee Benefits Security Administration; led projects to implement recommendations by Independent Compliance Consultants; successfully resolved related class action litigations; significantly restructured and improved AXAR governance and control functions; advised on outsourcing projects.

Handled and coordinated handling of legal issues for AXA-IM in Greenwich, CT, sister company under common ownership with AXAR, both entities within the AXA Investment Managers Group based in Paris.

May 2009 – June 2011 AXA LIFE INSURANCE CO., LTD. (“ALJ”) and AXA JAPAN HOLDING CO., LTD. (“AJH”)

**Executive Officer, General Counsel, Head of Legal & Compliance (ALJ)
Corporate Officer, General Counsel, Head of Legal & Compliance (AJH)
Counsel, APJ Government Relations, AXA Equitable Life Insurance Company (New York)**

Managed and supervised 72 persons in: Legal Division, Compliance Division and Distribution Control and Planning Division. Handled various legal issues including regulatory, employment, privacy, litigation, Corporate, M&A, outsourcing and other issues faced by the various business divisions of ALJ, AJH and other AJH subsidiaries (AXA General Insurance Co., Ltd. and Nextia Life Insurance Co., Ltd.). Compliance issues include incident inspection, compliance programs and training, sales material and payment screening, and financial compliance. Distribution



control issues include distribution management, administration and sales strategy (dual reporting line with CEO on sales strategy).

Also was in charge of Government Relations for AXA Group involving or impacting on operations in Japan, including discussion and negotiation with officials of FSA, LIAJ, and lobbying key Cabinet and sub-Cabinet members and other key Diet members, and officials in Brussels, Geneva and Washington, D.C.

October 2006 – April 2009 GE CONSUMER FINANCE CO., LTD (“GE MONEY JAPAN”; now SHINSEI FINANCIAL CO., LTD.) and SHINSEI CARD CO., LTD. (“SHINSEI CARD”)

General Counsel and Corporate Officer

Managed and supervised lawyers and legal managers divided between locations in Tokyo and Osaka. Legal issues handled included regulatory, litigation, privacy, M&A, Corporate, outsourcing, IP protection, IT-based business and other issues faced by the various business divisions of GE Money Japan and several credit card and mortgage subsidiaries. Intake of approximately 50 lawsuits a day re “gray zone interest”, formulated strategy and litigation templates, disseminated same among litigation counsel nationwide. Structured legal aspects of successful sale of GE Money Japan from GE to Shinsei Bank (closing September 2008), integration with other Shinsei Bank consumer finance entities, as well as successful demerger of credit card business and part of mortgage business into Shinsei Card entity.

Also was in charge of Government Relations for GE Money Japan and regarding many issues for other GE companies in Japan, including discussion and negotiation with officials of FSA, Ministry of Economy, Trade & Industry (METI), Kanto and Kinki Regional Finance Bureaus, Japan Financial Services Association, and lobbying key Cabinet and sub-Cabinet members and other key Diet members.

June 1994 - September 2006 BAKER & McKENZIE GJBJ/TOKYO AOYAMA AOKI LAW OFFICE

International Partner/Principal

(1997-2006)

Local Partner

(1994-1997)

Founded and headed Information Technology/Communications Practice Group within IP Department, subsequently heading overall Intellectual Property/ITC Practice Group, comprising one Japanese senior associate *bengoshi* (attorney at law), one Japanese senior associate *benrishi* (patent agent), two foreign associate lawyers, one Japanese junior associate *bengoshi* and one Japanese junior associate *benrishi*. Member of Litigation Practice Group. Practice focused on patent, trademark, design, unfair competition and trade secret disputes, U.S.-Japan technology transfers, and intellectual property and information technology acquisition, licensing and protection, including antitrust and foreign trade control aspects of same.



Developed and expanded cross-border litigation practice involving Japanese parties as clients or adversaries, close coordination of such litigation and arbitrations with trial counsel in other Baker & McKenzie offices, including antitrust, labor and sexual harassment, agency and dealer termination litigation. Principal partner for most complex cross-border litigation and arbitrations in venues such as Paris, Munich, Hong Kong, Singapore, Dubai and London, including matters in Japan for non-Japanese clients and matters outside Japan for Japanese clients whether or not technology related.

Principal partner in Government Relations practice at B&M Tokyo.

Representative cases during this time:

Johnson Electric North America, Inc. v. Mabuchi Motor America Corp., 77 F.Supp.2d 446 (S.D.N.Y. 1999).

Gibson Guitar Corp. v. Fernandes Co., Ltd., Tokyo High Court Decision of Feb. 24, 2000 (Case No. 1998 (ne) 2942).

Pias Arise Co., Ltd. v. Playboy Enterprises International, Inc., JPO Trial Decision of April 3, 2000 (Igi 1999-90433)

Johnson Electric North America, Inc. v. Mabuchi Motor America Corp., 98 F.Supp.2d 480 (S.D.N.Y. 2000).

Levi Strauss & Co. v. Edwin Co., Ltd., Tokyo High Court Decision of Dec. 26, 2001 (Case No. 2000 (ne) 3882).

Shueisha Co., Ltd. v. Playboy Enterprises International, Inc., JPO Trial Decision of June 26, 2003 (Igi 2002-90016)

July 1989 – June 1994

BAKER & McKENZIE

Local Partner, San Francisco/Palo Alto

(1991-1994)

Associate, San Francisco/Palo Alto

(1989-1991)

Focused on patent, trademark, design, unfair competition and trade secret disputes, U.S.-Japan technology transfers, and intellectual property and information technology acquisition, licensing and protection, including antitrust and foreign trade control aspects of same. Founded and headed Japan Practice Group, supervising two *bengoshi* associates and one California lawyer associate in a variety of cross-border corporate and M&A transactions working closely with Tokyo Aoyama Law Office. Extensive trial experience in federal and state courts situate in California, New York, District of Columbia (member of bars of these courts, including admission in New York during several related, extended litigations), Massachusetts, Virginia, Oregon, Washington, Guam and Northern Mariana Islands (admitted *pro hac vice* in most of these cases).



Representative cases during this time: *Acuson Corp. v. Aloka Co., Ltd.*, 209 Cal.App.3d 425 (subsequently decertified), 10 U.S.P.Q.2d 1814 (1989).
Johnson Electric North America, Inc. v. Mabuchi Motor America Corp., 878 F.2d 1445 (Fed. Cir. 1989).
In re Johnson Electric North America, Inc., 979 F.2d 215 (Fed. Cir. 1992).

July 1984 – June 1989 TOKYO AOYAMA LAW OFFICE (associated with BAKER & McKENZIE)

Associate (1984-1989)

Focused on patent, trademark, design, unfair competition and trade secret disputes, U.S.-Japan technology transfers, and intellectual property acquisition, licensing and protection, including antitrust and foreign trade control aspects of same. Coordinated intellectual property litigation in the U.S.A., various Asian countries and the U.K., Germany and France.

August 1982 – May 1984 U.S. DEPARTMENT OF HEALTH AND HUMAN SERVICES

Law Clerk, Office of the General Counsel

Primary focus was defense of appeals of Administrative Law Judge (ALJ) decisions in cases concerning Social Security disability and retirement benefits.

August 1981 – May 1983 NIHONMACHI LEGAL OUTREACH (now called ASIAN PACIFIC ISLANDER LEGAL OUTREACH)

Law Clerk

Assisted attorneys with intake of Japanese-speaking clients, discussions of their legal rights and obligations, interpretation in court proceedings. (Most tasks performed pro bono.)

LICENSES

- Member of the California Bar since 1985
- Member of the Washington, D.C. Bar since 1988
- Member of the New York Bar since 1996
- Admitted in the United States District Courts for the Northern, Central, and Southern Districts of California, for the Southern and Eastern Districts of New York, for the Eastern



District of Michigan, and for the District of Columbia, and the United States Courts of Appeals for the Federal, Second and Ninth Circuits

- Admitted in the United States Army Court of Criminal Appeals (ACCA), and the United States Court of Appeals for the Armed Forces (CAAF)
- Special Foreign Member of the Tokyo Bar Association and the Japan Federation of Bar Associations from 1993 to June 2011

EDUCATION

Northwestern University, Kellogg School of Management, EMBA, 2001

University of California, Hastings College of the Law, J.D., 1984

International Christian University, B.A. majoring in Social Sciences, continued studies of Advanced Calculus and Physics (most coursework in the Japanese language), 1979

University of California at Berkeley, focusing on pre-Engineering, minoring in Japanese language, 1974-1977

LANGUAGES

Native English

Fluent, near-native Japanese (reading, writing and speaking)

Good Spanish, French and Tagalog

Basic Chinese reading, Basic Korean conversation

COURSES

General Electric (GE):

Lean Six Sigma training

National Guard Bureau (NGB):

Lean Six Sigma Green Belt training

NGB Trial Defense Service (TDS):

Defense Counsel 101 (DC-101)

NGB TDS:

Defense Counsel 201 (DC-201)

HONORS AND AWARDS

Tokyo Bar Association:

Certificate of Appreciation, May 2011

American Chamber of Commerce in Japan:

Certificate of Appreciation, May 2011

Soma City, Fukushima Prefecture,

Disaster Volunteer Center:

Certificate of Appreciation, May 2011

California National Guard:

California National Guard Commendation Medal,
September 2013

California National Guard Medal of Merit, March
2017

U.S. Army:

Civilian Award for Humanitarian Service,
November 2016 (for acts while a civilian after the



earthquake, tsunami and nuclear disaster in Japan in March 2011)

PUBLICATIONS AND PRESENTATIONS

Authored a number of articles on U.S. and Japanese patents, trademarks, unfair competition, trade secrets, copyright, and intellectual property and information technology protection, licensing, litigation and arbitration, and Japanese language instruction, published in publications such as:

- *AIPLA Quarterly Journal*
- *INTA's Trademark Reporter*
- *European Intellectual Property Review*
- *California International Practitioner*
- *IPAsia*
- *Managing Intellectual Property*
- *International Commercial Litigation*
- *PatentWorld*
- *TrademarkWorld*
- *CopyrightWorld*
- *Gekkan Kaigai Chuzai* (in Japanese)
- *Libra* (Journal of the Tokyo Bar Association, in Japanese)
- *Liberty & Justice* (Journal of the Japan Federation of Bar Associations, in Japanese)
- *Proceedings of the International Christian University (ICU), Department of Linguistics* (in Japanese)
- Hattori, T., Henderson, D. F., Taniguchi, Y., Reich, P. C., Miyake, H. (2000). *Civil Procedure in Japan* (2nd Ed.) Huntington, NY: Juris Publications, Inc. (assisted in review of sections on transnational legal services and transnational litigation in Japan).

Presented a number of these papers at programs conducted by:

- American Intellectual Property Law Association
- American Bar Association Annual Meeting
- International Trademark Association
- International Anti-Counterfeiting Coalition
- Pharmaceutical Trade Marks Group
- Intellectual Property Office of Singapore (IPOS)
- State Bar of California
- University of California, Hastings College of the Law
- U.S. Naval War College
- University College London
- Taiwan Legal Training and Research Institute (in English and Japanese)



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- Temple University in Tokyo
 - American Chamber of Commerce in Japan
 - Tokyo Bar Association (in Japanese)
 - Dai-Ichi Tokyo Bar Association (in Japanese)
 - Inter-Pacific Bar Association
 - Osaka Chamber of Commerce (in Japanese)
 - Japan Broadcasting Corporation (NHK) (in Japanese)
 - International Christian University (ICU) (in Japanese)

ACTIVITIES

- The American, San Francisco and Marin County Bar Associations; the American Intellectual Property Law, International Trademark, and Japanese American Veterans Associations; the Judge Advocates and Military Officers Associations of America; the International Association for the Protection of Intellectual Property (AIPPI) – U.S. Division; the Institute of Electrical and Electronics Engineers (past member); the Japan Commercial Arbitration Association’s Panel of Arbitrators; the U.S.-Japan Council; the Japanese American Citizens League; the American Legion Wilkins Post 37; the National Guard Association of the United States (NGAUS); the State Guard Association of the United States (SGAUS)
- Discovery Facilitator Panel, Marin County Superior Court
- The Tokyo Bar Association (Senior Vice Chair of the International Committee 2000 to 2011)
- The Japan Federation of Bar Associations (Member, International Relations Committee 2006 to 2011 (JFBA delegate to 2010 ABA Annual Meeting); previously Auditor, Committee on Foreign Lawyers and International Practice)
- Japan Association of Arbitrators (Member, Board of Directors from inception in 2003 through June 2011)
- Japan Ministry of Justice’s Experts Council on Translation of Japanese Laws and Regulations into Foreign Languages (Apr. 2009-June 2011)
- Japan Cabinet Secretariat’s Office for Promotion of Justice System Reform (Member, Study Council for Promoting Translation of Japanese Laws and Regulations into Foreign Languages, June 2006-Mar. 2009)
- American Chamber of Commerce in Japan (Chair, Intellectual Property Committee, 1997-2000, Governor, 2001-2002, Vice President and Co-Chair of External Affairs Advisory Council 2003-2004, Special Advisor to President 2005, Governor and Vice Chair of External Affairs Advisory Council 2006-2007, Governor and Chair of Internal Affairs Advisory Council 2008; Governor representing non-US corporations 2009-June 2011)
- European Business Council in Japan (Chair, Insurance Committee, May 2009-June 2011)
- EU-Japan Business Round Table (EU-side Sherpa for Financial Services and Accounting Working Group at Annual Meetings in 2009 (Brussels), 2010 (Tokyo) and 2011 (Rome), including ongoing work with Japan-side Sherpas negotiating and preparing joint and separate position papers in preparation for these Annual Meetings)



PRO BONO AND COMMUNITY INVOLVEMENT

- Qualified and active Instructor of Goju-ryu Karate (4th Dan).
- Past Coordinator of Prison Ministry, Franciscan Chapel Center (Tokyo).
- Led several teams of volunteers to Fukushima, Japan, after March 2011 Earthquake, Tsunami and Nuclear Disaster, to assist with disaster recovery efforts.
- Lector, Eucharistic Minister, Sacristan and Coordinator of Altar Server Ministry, St. Isabella's Church (San Rafael).

#1

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, February 03, 2021 2:11:11 PM
Last Modified: Wednesday, February 03, 2021 2:23:46 PM
Time Spent: 00:12:34
IP Address: 162.235.143.90

Page 1

Q1

Contact Information

First and Last Name	Jon Haveman
Address	[REDACTED]
City/Town	San Rafael
State/Province	CA
ZIP/Postal Code	94901
Email Address	[REDACTED]
Phone Number	[REDACTED]

Q2

Planning Commission

What Board would you like to apply to?

Page 3

Q6

How long have you lived in San Rafael?

19 years

Q7

Business Information

Company	National Economic Education Delegation
Address	847 4th St, Second Floor #1
City/Town	San Rafael
ZIP/Postal Code	94901

Q8

How did you hear about this vacant position?

Other (please specify):

Newspaper Article

Q9

Do you participate in any civic activities? If so, what are they?

Elementary School District Budget Committee (3 Years)

High School District Budget Committee (3 years)

National Economic Education Delegation (3 years, Executive Director)

Vice Treasurer, Kate Colin for Mayor

Q10

List any civic organizations of which you are a member:

Citizens Climate Lobby

National Economic Education Delegation

Q11

Education:

Ph.D. in Economics, University of Michigan

Q12

Why are you interested in serving on a board or commission?

I have lived in San Rafael for 19 years. It is my home and I would like to be actively involved in helping it to be the wonderful town that it is. I am interested in the planning commission because I feel that I have expertise and experience that would be well utilized on the commission.

Q13

Describe possible areas in which you may have a conflict of interest with the City:

I am unaware of any possible conflicts of interest.

Q14

Upload your resume.

HavemanCV_Dec20.pdf (87.5KB)

Q15

Ethnicity

[REDACTED]

Q16

To which gender do you most identify?

[REDACTED]

Q17

How old are you?

[REDACTED]

Curriculum Vitae

Jon D. Haveman, Ph.D.

**Executive Director
National Economic Education Delegation
[REDACTED]
San Rafael, CA 94901**

Education

- 1992: Ph.D. in Economics, University of Michigan, Ann Arbor
- 1990: M.A. in Economics, University of Michigan, Ann Arbor
- 1986: B.S. in Economics, University of Wisconsin, Madison

Employment History

- 2020-Current: Executive Director, AskAnEconomist.org
- 2018-Current: Founder and CEO, EconSpeak.org
- 2017-Current: Founder and Executive Director, National Economic Education Delegation
- 2013-Current: Principal, Marin Economic Consulting, LLC
- 2013-Current: Senior Research Fellow, Marin Economic Forum
- 2011-2013: Founding Principal, Haveman Economic Consulting, LLC
- 2011-2013: Chief Economist, Bay Area Council Economic Institute
- 2007-2010: Founding Principal, Beacon Economics, LLC
- 2004-2006: Program Director, Economy, Public Policy Institute of California
- 2003-Current: Founder and Executive Director, Forum for Research in Empirical International Trade (FREIT)
- 2001-2004: Research Fellow, Public Policy Institute of California
- 2000-2001: Economist, United States Federal Trade Commission
- 1999-2000: NSF/ASA Visiting Research Fellow, U.S. Bureau of the Census, Center for Economic Studies
- 1999: Visiting Fellow, Public Policy Institute of California
- 1997-1998: Senior Economist, Council of Economic Advisers, Executive Office of the President of the United States
- 1992-2000: Assistant Professor, Purdue University, Krannert School of Management
- 1985-1987: Research Associate, Laurits R. Christensen Associates

Consulting Experience/Major Clients

- 2019: Prosperity Now
- 2017: United States Geological Survey (USGS)
- 2016: Mission Bay Alliance

- 2015: ExtraFood.org Advisory Board, Consulting Economist
- 2015: Ewing Marion Kauffman Foundation
- 2015: Joint Venture Silicon Valley
- 2014: Marin Economic Forum
- 2014: Corporation for Enterprise Development
- 2013: Bay Area Council Economic Institute
- 2012: San Mateo Transportation (SAMTrans)
- 2012: California Endowment
- 2012: Bay Area Joint Policy Committee
- 2010: East Bay Economic Development Alliance
- 2010: San Mateo County Economic Development Association
- 2009: Child and Family Policy Institute of California
- 2008-2009: Port of Oakland
- 2008-2009: City of Oakland, CA
- 2008: City of San Jose, CA
- 2007-2008: William and Flora Hewlett Foundation
- 2006, 2008: American Institute of Certified Public Accountants
- 1991-1998: The Center for Research on Budget and Policy Priorities
- 1991: The Urban Institute

Select Speeches/Talks Given as Consultant (Select List)

- United Way of Silicon Valley
- California High Speed Rail Authority
- San Mateo County
- Presidio Bank
- Marin Forum
- North Bay Leadership Council
- Association of California Community College Administrators
- Walz Group
- Alameda County Finance Officers Group
- Citibank
- City National Bank
- Bay Area Council Economic Institute
- Association of Pacific Ports
- California Maritime Leadership Symposium
- City of Alameda
- Kaiser Permanente
- Monterey County
- Construction Employers Association
- Burr, Pilger, Mayer
- Urban Land Institute
- San Francisco Chamber of Commerce
- South Bay Economic Development Alliance
- Humboldt County
- Colliers International
- Bay Area World Trade Center

- Northern California Trade Corridor Coalition
- Los Angeles Chamber of Commerce
- Port of Los Angeles
- Port of Oakland

Recent Economic Development and Consulting Publications

“Bay Area Employment Changes: Trouble in the Tech World? February, 2017 Update”, SAMCEDA, April 2017.

“The State of Redwood City, California: Indicators and Revenue Forecasts”, March 2017.

“California Regulations and Employment in Silicon Valley”, for Joint Venture Silicon Valley, July 2016.

“Warriors Stadium Economics: Uncertainty and Alternatives”, for the Mission Bay Alliance, November 2015.

“Marin County Comprehensive Economic Development Strategy (CEDs)”, coauthored with Rob Eyler and the Marin Economic Forum, September 2015.

“Inequality in the San Francisco Bay Area”, Joint Venture Silicon Valley, July 2015.

“Poverty in the San Francisco Bay Area”, Joint Venture Silicon Valley, March 2015.

“US Economic Overview”, Marin Economic Forum, October 2015, 2014, and 2013.

“California Economic Overview”, Marin Economic Forum, October 2015, 2014, and 2013.

“Driver-LMC Relationships in Port Drayage: Effects on Efficiency, Innovation, and Rates – With Special Attention to Shippers Transport Express,” Marin Economic Consulting White Paper, August, 2014.

“The Economic Impact of the 34th America’s Cup in San Francisco,” Bay Area Council Economic Institute, December 2013.

“The Economic Impact of San Francisco Hotels,” Bay Area Council Economic Institute, October 2013.

“The Bay Area: A Regional Economic Assessment,” Bay Area Council Economic Institute, October 2013.

“Labor Supply and Commute Patterns in San Mateo County,” Bay Area Council Economic Institute, November 2012.

“The Economic Impact of Caltrain Modernization,” Bay Area Council Economic Institute, June 2012.

“The Economic Impact of the Affordable Care Act on California,” Bay Area Council Economic Institute, May 2012.

“Building on our Assets: Economic Development and Job Creation in the East Bay,” contributing author, East Bay Economic Development Alliance, October 2011.

“Deconstructing and Understanding the Employment Dynamics of the San Mateo County Economy,” Haveman Economic Consulting, June 2011.

“The America’s Cup: Economic Impacts of a Match on San Francisco Bay,” Bay Area Council Economic Institute, July 2010.

“Comprehensive Truck Management Program: Economic impact Analysis,” for the Port of Oakland, March 2009.

“Spending on County Human Services Programs in California: An Evaluation of Economic Impacts,” with Eric Fisher and Fannie Tseng, for the Child and Family Policy Institute of California, March 2009.

“Clean Trucks Program: An Economic Policy Analysis,” with Christopher Thornberg, for the William and Flora Hewlett Foundation, February 2008.

“Waiting To Save: A Crisis of the Young,” with Christopher Thornberg, for the American Institute of Certified Public Accountants, November 2008.

“An Economic Backdrop for Fiscal Reform in California,” with Christopher Thornberg, for California Forward, November 2008.

“Container Fees and Commercial Benefits of Improved Waterborne Goods Movement Infrastructure in California,” with Christopher Thornberg, for the Natural Resources Defense Council and the Coalition for Clean Air, August 2007.

“Savings and Asset Accumulation Among Americans 25-34,” with Christopher Thornberg, for the American Institute of Certified Public Accountants, October 2006.

Refereed Publications

“The Container Security Initiative and Ocean Container Threats,” with Howard J. Shatz, Ethan Jennings, and Gregory C. Wright. *Journal of Homeland Security and Emergency Management*, v. 4, no. 1, Mar. 2007.

"U.S. Port Security Policy After 9/11: An Overview and Evaluation," with Howard J. Shatz. *Journal of Homeland Security and Emergency Management*, Vol 2, No. 4, 2005.

"Developed Country Trade Barriers and the Least Developed Countries: The Current Situation," with Howard J. Shatz. *Journal of Economic Integration*, Vol 19, No. 2, 2004.

"Developed Country Trade Barriers and the Least Developed Countries: The Economic Results of Freeing Trade," with Howard J. Shatz. In *The WTO, Developing Countries and the Doha Development Agenda: Prospects and Challenges for Trade-Led Growth*, edited by Basudeb Guha-Khasnobis, Palgrave-Macmillan, 2004.

"Alternative Hypotheses and the Volume of Trade: The Gravity Equation and the Extent of Specialization," with David Hummels. *Canadian Journal of Economics*, Vol. 37, No. 1, 2004.

"How Effective are Trade Barriers? An Empirical Analysis of Trade Reduction, Diversion and Compression," with Jerry Thursby and Usha Nair-Reichert. *Review of Economics and Statistics*, Vol. 85, No. 2, 2003.

"International Integration and Growth: A Survey and Empirical Investigation" with Vivian Lei and Janet S. Netz. *Review of Development Economics*, Vol. 5, Issue 2, June 2001.

"All in The Family: Family, Income and Labor Force Attachment." with Janet S. Netz. *Feminist Economics*, Vol. 5, No. 2, Fall 1999.

"The Influence of Changing Trade Patterns on Displacements of Labor." *International Trade Journal*, Vol. 12, No. 2, Summer 1998.

"Trade Creation and Trade Diversion: Some New Empirical Evidence," with David Hummels. *Journal of Transnational Management Development*, Vol. 3, No. 2, 1998. Reprinted in *Globalization and Regionalization: Strategies, Policies, and Economic Environments*, eds, Jean-Louis Muchielli, Peter J. Buckley, and Victor V. Cordell, 1998.

"The Effects of Protection on the Pattern of Trade: A Disaggregated Analysis," with Jerry Thursby and Usha Nair. In *Business and Economics for the 21st Century*, Vol. 1, 1997.

"Some Welfare Effects of Sequential Customs Union Formation," *Canadian Journal of Economics*, Vol. 29, No. 4, November 1996.

"The Effects of U.S. Trade Laws on Poverty in America," with Alan V. Deardorff, *Journal of Human Resources*, Vol. 30, No. 4, Fall 1995.

“Sectoral Effects of Reductions in NATO Military Expenditures in the Major Industrialized and Developing Countries,” with Alan V. Deardorff and Robert M. Stern, *Open Economies Review*, Vol. 4, No. 3, 1993.

“Some Economic Effects of Unilateral and Multilateral Reductions in Military Expenditures in the Major Industrialized and Developing Countries,” with Alan V. Deardorff and Robert M. Stern, *Journal of Conflict Management and Peace Science*, Vol. 12, No. 1, 1992. Reprinted in *Defense Spending and Economic Growth*, eds, James E. Payne and Anandi P. Sahy, 1993.

Other Publications

“An Overview of U.S. Port Security Programs,” with Howard J. Shatz, in *The Economic Impacts of Terrorist Attacks*, Harry W. Richardson, Peter Gordon, and James E. Moore, II (eds.) Edward Elgar: Northampton MA, 2005.

“The Benefits of Market Opening,” with Mark R. Hopkins, *1998 Economic Report of the President*, Chapter 7, February 1998.

“The Welfare Implications of Trading Blocs Among Countries with Different Endowments: A Comment,” In *The Regionalization of the World Economy*, J. A. Frankel (ed.), 1997.

“Victory for Free Trade and For Indiana,” with Janet S. Netz, *Hoosier Banker*, Vol. 79, No. 2, February 1995.

“New Dimensions in Regional Integration: A Review,” *Journal of International Economics*, Vol. 38, No. 1/2, 1995.

“Computational Analysis of the Sectoral Effects on United States Trade and Employment of Unilateral and Multilateral Reductions in Military Expenditures,” with Alan V. Deardorff and Robert M. Stern, in *The Macroeconomic Dimensions of Arms Reductions*, edited by F. Gerard Adams. Pew Studies in Economics and Security. Boulder and Oxford: Westview Press, 1992.

“State Poverty Rates for Whites, Blacks, and Hispanics in the Late 1980s,” with Sheldon Danziger and Robert D. Plotnick, *Focus*, Vol. 3, No. 1, Spring 1991.

Publications for the Public Policy Institute of California

“Securing the Nation’s Seaports: Balancing Security and cost” with Howard J. Shatz. Public Policy Institute of California, Edited Volume, 2006.

“California and the Global Economy: Recent Facts and Figures, 2006 Edition” with Ethan M. Jennings and Howard J. Shatz. Public Policy Institute of California, Occasional Paper, 2006.

“Recent Trends in Exports of California’s Information Technology Products,” with Howard J. Shatz, in California Economic Policy, Vol. 1, No. 2, Public Policy Institute of California, 2005.

“California and the Global Economy: Recent Facts and Figures,” with Howard J. Shatz and Greg C.Wright. Public Policy Institute of California, Occasional Paper, 2005.

“Services Offshoring: Background and Implications for California,” with Howard J. Shatz, Public Policy Institute of California, Occasional Paper, 2004.

"California’s Global Gateways: Trends and Issues," with David Hummels. Public Policy Institute of California, April, 2004.

"Foreign Tariff Reductions and California’s Exports." Public Policy Institute of California, June, 2003.

“Imports, Exports, and Shipping Services: The Balance Between California and Other States.” Public Policy Institute of California, Occasional Paper, April 2003.

“California and the World Economy: Exports, Foreign Direct Investment and U.S. Trade Policy,” with Howard J. Shatz , and Ernesto Vilchis. Public Policy Institute of California, Occasional Paper, December 2002.

“Expanding California's Technology Sector.” Public Policy Institute of California, Occasional Paper, November 2002.

"California's Vested Interest In U.S. Trade Liberalization Initiatives." Public Policy Institute of California, March 2001.

Testimony and Presentations before Government Bodies

May/17: “A Redwood City Economic Forecast”, Redwood City City Council, Redwood City, CA.

April/17: “A Redwood City Economic Forecast”, Redwood City City Council Finance Subcommittee, Redwood City, CA.

January/17: Economic Forecast Roundtable, California Energy Commission, Sacramento, CA.

March/16: Testimony before the San Francisco Board of Supervisors regarding the America’s Cup, San Francisco, CA.

October/12: “The Economic Impact of Caltrain Modernization,” California High Speed Rail Authority, Sacramento, CA.

November/06: "Securing the Nation's Seaports: Balancing Security and Costs," Presentation before the Port of Los Angeles Harbor Commission, San Pedro, CA.

August/06: "Securing the Nation's Seaports: Balancing Security and Costs," Joint Legislative Committee on Emergency Services and Homeland Security and the Senate Committee on Transportation & Housing Subcommittee on California Ports & Goods Movement, Securing California's Maritime Transportation System: Seamless Operational Security (SOS), Long Beach, CA.

July/06: "Securing the Nation's Seaports: Balancing Security and Costs," luncheon presentation for Congressional Staffers, Washington, DC.

July/04: "California's Global Gateways: Trends and Issues," presented at a meeting of the Port of Los Angeles Citizen's Advisory Commission.

May/04: "Background and Perspectives on Offshoring," presented at a hearing on the Offshoring of Services sponsored by the California Assembly Office of Policy Planning and Research.

August/03: "Foreign Tariff Reductions and Southern California's Small and Medium Sized Exporters," presented to the Subcommittee on Tax, Finance, and Exports of the Committee on Small Business of the United States House of Representatives at a hearing entitled *Small Business Exporting and the Southern California Economy*, Long Beach, California.

July/03: "Foreign Tariff Reductions and California Exports," luncheon presentation for Congressional Staffers, Washington, DC.

April/03: "Imports, Exports, and Shipping Services: The Balance Between California and Other States," luncheon presentation for Congressional Staffers, Washington, DC.

November/02: "Expanding California's Technology Sector," presented to the California Assembly Subcommittee on Information and Technology in Santa Clara, California.

November/01: "California's Vested Interest in U.S. Trade Liberalization Initiatives," luncheon presentation for Congressional Staff, Washington, DC.

Professional Service (2000-Present)

2006-Current: Co-Organizer of professional development conferences in each of the United States, Japan, Canada, and Slovenia each year.

October 2006: Conference Co-Organizer, The Thirteenth Annual Conference on Empirical Investigations in International Trade, with Calgary University, in Banff, Canada.

June 2006: Conference Co-Organizer, The Third Annual Conference on Empirical Investigations in International Economics, Ljubljana University, Slovenia.

November 2005: Conference Co-Organizer, The Twelfth Annual Conference on Empirical Investigations in International Trade, at Purdue University.

June 2005: Conference Co-Organizer, The Second Annual Conference on Empirical Investigations in International Economics, Ljubljana University, Slovenia.

November 2004: Conference Co-Organizer, The Eleventh Annual Conference on Empirical Investigations in International Trade, at The University of California – Santa Cruz.

June 2004: Conference Co-Organizer, The First Annual Conference on Empirical Investigations in International Economics, Ljubljana University, Slovenia. Sponsored primarily by the Faculty of Economics, Ljubljana University.

November 2003: Conference Co-Organizer, The Tenth Annual Conference on Empirical Investigations in International Trade, at Purdue University.

November 2000: Conference Co-Organizer, The Seventh Annual Conference on Empirical Investigations in International Trade, at the University of Colorado - Boulder.

Referee: American Economic Review, Economic Journal, Journal of International Economic Integration, Journal of International Economics, Review of International Economics, Review of Economic Statistics, Journal of Industrial Economics, Southern Economic Journal, Canadian Journal of Economics, Journal of Peace Science.

Reviewer: National Science Foundation

Conference Participation/Presentations (2000-current)

November, 1994-March, 2019: 64 conferences organized under the Forum for Research in Empirical International Trade (FREIT)

- Empirical Investigations in International Trade, United States
- Rocky Mountain Empirical Trade, Canada
- Ljubljana Empirical Trade Conference, Slovenia
- Sardinia Empirical Trade Conference, Italy
- Empirical International Trade and Investment, Asia (various)

April/06: Participant, Fresh Voices: The United States and Europe in a New Age, The Hague, Netherlands.

February/06: Presenter: "Seaport Activity and Local Establishment Dynamics," National Urban Freight Conference, Sponsored by USC and CSULB, Long Beach, CA.

December/05: Participant, Fresh Voices: The United States and Europe in a New Age, Austin, TX.

December/03: Participant and Discussant, Regional Integration Network Symposium on Globalization, Punta Del Este, Uruguay.

July/03: Panelist: "The Globalization of California's Economy," Roundtable Discussion, organized by the Bay Area Economic Forum, the Public Policy Institute of California, and the Pacific Council on International Policy, San Francisco, CA.

June/03: Presented: "Foreign Tariff Reductions and California's Exports," Congressional Briefing organized by the California Institute, Washington, DC.

June/03: Presented: "Foreign Tariff Reductions and California's Exports," at a discussion forum organized by the Pacific Council on International Policy, Los Angeles, CA.

November/02: Discussant, Conference on: *Empirical Investigations in International Trade*, Emory University.

October/02: Discussant, Fifth annual Santa Cruz Center for International Economics Conference.

November/01: Discussant, Conference on Empirical Investigations in International Trade, Purdue University.

July/01: Presented: "Trade Reduction, Compression, and Diversion: Empirical Regularities in the Effects of Protective Measures." Industrial Production Group - Federal Reserve Board, Washington, DC

November/00: Discussant, Conference on: *Empirical Investigations in International Trade*, University of Colorado - Boulder.

January/00: Presented: "Trade Reduction, Compression, and Diversion: Empirical Regularities in the Effects of Protective Measures." Bureau of Economic Analysis, Washington, DC

Courses Taught

- Principals of Microeconomics (Undergraduate)
- International Economics (Undergraduate)
- Labor Economics (Undergraduate, Masters)
- Managerial Economics (Graduate)
- Economic Analysis (Undergraduate)
- Empirical International Trade (Graduate)
- International Trade Theory (Graduate)
- Managerial Economics (Graduate)

#4

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, February 25, 2021 11:12:44 PM
Last Modified: Thursday, February 25, 2021 11:24:10 PM
Time Spent: 00:11:25
IP Address: 71.198.122.92

Page 1

Q1

Contact Information

First and Last Name	Stephen Roth
Address	[REDACTED]
City/Town	San Rafael
State/Province	CA
ZIP/Postal Code	94901
Email Address	[REDACTED]
Phone Number	[REDACTED]

Q2

Planning Commission

What Board would you like to apply to?

Page 3

Q6

How long have you lived in San Rafael?

19 years

Q7

Business Information

Company	Carmel Software
Address	1050 Northgate Dr Ste 360
City/Town	San Rafael
ZIP/Postal Code	94903

Boards and Commissions Application

Q8

How did you hear about this vacant position?

Other (please specify):

From Lindsay Lara

Q9

Do you participate in any civic activities? If so, what are they?

1. Currently serve on the San Rafael City Cannabis Industry Tax Oversight Committee
 2. Currently serve as Treasurer of the local youth swimming club Swimarin (6+ years)
 3. Served as Treasurer of the Glenwood Elementary School PTO
-

Q10

List any civic organizations of which you are a member:

1. San Rafael City Cannabis Industry Tax Oversight Committee
 2. Swimarin youth swimming club
-

Q11

Education:

BSE in Engineering from University of Pennsylvania
MBA in Finance and Operations Management from University of Cincinnati

Q12

Why are you interested in serving on a board or commission?

I have lived in San Rafael for 19+ years, and I love this community and its citizens. My son has attended public school all the way through SR High School. I am passionate about this community and want to contribute to its success.

Like everything in life, nothing is perfect, and San Rafael has its share of problems. By serving on the Planning Commission, I hope to use my professional and life skills to help improve our fine city.

Q13

Describe possible areas in which you may have a conflict of interest with the City:

I don't have any conflicts of interest.


Q14

Upload your resume.

Resume_SBR.pdf (519KB)

Page 4: Demographics

Q15 
Ethnicity 

Q16 
To which gender do you most identify?

Q17 
How old are you?

Stephen B. Roth

<http://www.linkedin.com/in/stephenbroth>

A seasoned entrepreneur and software product manager and developer with other 25 years of relevant experience.

PROFESSIONAL EXPERIENCE:

Carmel Software, Inc. (<https://www.carmelsoft.com>), San Rafael, CA (November 2009 - Current): Principal and Owner of Carmel Software. I restarted Carmel Software after selling our desktop software intellectual property to Autodesk. Under my leadership, Carmel is engaged in the following activities:

1. Developing and licensing mobile and tablet-based software applications (iOS / Android) for field-based building energy audits and other HVAC engineering analysis. We have licensed 200,000+ mobile apps worldwide to date.
2. Licensing our mobile software intellectual property to Fortune 500 companies in the building services industry, including Mitsubishi Electric, Ingersoll-Rand Trane, DNV GL (formerly KEMA), and Taco, Inc.
3. Developing customized mobile software tools for major U.S. utilities including Duke Energy, PG&E and Southern California Edison. These tools allow building owners whose buildings are serviced by these utilities to perform audits of their mechanical equipment and apply for energy savings rebates and incentives.
4. Developing highly-specialized customized mobile and desktop engineering and visualization software for organizations such as Carrier, ASHRAE, Autodesk, Honeywell, Mitsubishi Electric, Rinnai America, Advantix Systems, AG Solutions, DNV GL, the U.S. Department of Energy, Pacific Northwest National Laboratory, and numerous other companies.
5. Developed and currently licensing a patent-pending mobile and web-based BIM (building information modeling) platform for use by technicians and engineers for building and equipment audits.

In the 10-years since Carmel has been developing mobile software, we have licensed and customized over \$2 million worth of mobile applications.

gbXML.org (<https://www.gbxml.org>), San Rafael, CA (November 2009 - Current): President of the Board of Directors of Green Building XML (gbXML). gbXML is an open XML schema that allows for the exchange of building information from 3D BIM authoring tools to building analysis software tools. As President, I am performing the following functions:

1. Helping to develop and improve the gbXML schema to accommodate the needs of architects and engineers worldwide. Currently the schema includes 500+ types of data elements describing all aspects of a building.
2. Securing over one half-million in funding rounds from the U.S. Department of Energy, Pacific Northwest National Laboratory, National Renewable Energy Laboratory (NREL), Autodesk, ASHRAE, and Bentley Systems.
3. Working with 53 software vendors including large organizations such as Autodesk, Bentley, US Department of Energy, Carrier, and Trane to develop gbXML import and export functionality into their software tools.
4. Maintaining the non-profit company that supports gbXML: Open Green Building Schema, Inc. (or gbXML.org). This includes conducting quarterly board meetings and performing PR and marketing activities.
5. Conducting quarterly webcasts to 1000s of stakeholders by featuring software tools that integrate with gbXML
6. Developing a web-based validation tool and SDK so BIM authoring tool and building analysis vendors are able to check their gbXML integration
7. Creating "test cases" so that software vendors for such tools as Autodesk Revit, NREL's Open Studio and others can successfully create valid gbXML outputs.

8. Successfully creating a community of 1000s of architectural/engineering stakeholders to better understand how to utilize BIM and analysis software to model building energy usage.
9. Currently working with Autodesk and the Georgia Tech University Department of Engineering to develop complex test case algorithms.

Autodesk, Inc., San Rafael, CA (January 2008 to November 2009): Autodesk acquired the software intellectual property of Carmel Software in 2008. I was hired as Senior Product Manager of Revit MEP to aid with the following:

1. Helped integrate the Carmel Software IP into Revit MEP
2. Investigated and created the list of requirements for future versions of Revit MEP
3. Directly and indirectly managed a group of 30 to aid in development, documentation, and marketing of Revit MEP
4. Met with customers to acquire requirements for Revit MEP
5. Worked with the Green Building Studio team to integrate it with Revit MEP
6. Spoke at industry conferences nationwide to promote Revit MEP and related sustainable design software tools

EXTRA-CIRRICULAR ACTIVITIES AND HONORS:

- ASHRAE: Current Chair of ASHRAE SPC-224: The Application of Building Information Modeling
- ASHRAE: Prior Chair and Current Voting Member, TC 1.5: Computer Applications
- ASHRAE: Current Voting Member, MTG-BIM: Multidisciplinary Task Group on Building Information Modeling Standardizing and Utilizing ASHRAE Online BIM Data Exchange Protocols
- ASHRAE: Current Corresponding Member, TC 7.6: Data Interoperability Schemas
- ASHRAE: Member of ASHRAE RP-1810 project monitoring subcommittee: "Development of Reference Building Information Model (BIM) Test Cases for Improving Usage of Software Interoperability Schemas"
- ASHRAE: Current Corresponding Member, Building EQ Committee
- ASHRAE: Past Voting Member, SGPC 20: Documenting HVAC&R Work Processes and Data Exchange Requirements
- ASHRAE: Past member of ASHRAE SPC-205
- Active member of United States Green Building Council (USGBC)
- Member of National Society of Professional Engineers (NSPE)
- Active member of working group for the U.S. Department of Energy's Building Energy Data Exchange Specification (BEDES) initiative (<http://energy.gov/eere/buildings/building-energy-data-exchange-specification-bedes>)
- Active member of Toastmasters International (International speaking organization). Winner of numerous speaking awards
- Registered Professional Engineer (PE) in State of California
- Registered LEED AP (Leadership in Energy Efficiency Design – Advanced Placement)
- Currently speak at industry conferences about how architects and engineers use mobile software to design energy efficient buildings

EDUCATION:

University of Cincinnati, Cincinnati, OH. (9-89 to 5-91)

Masters of Business Administration in Finance.

University of Pennsylvania, Philadelphia, PA. (9-85 to 5-89)

Bachelor of Science in Mechanical Engineering and Applied Mechanics and Business from the Engineering and Wharton Schools.

Chapter 2.16 BOARDS AND COMMISSIONS

2.16.040 Planning Commission--Creation--Membership.

There is created a planning commission for the city, consisting of seven members, not officials of the city, appointed by the mayor with the approval of the city council. (Ord. 505).

2.16.050 Terms of Planning Commission Members.

Of the members of the Commission first appointed, two shall be appointed for the terms of one year; two for the terms of two years; two for the terms of three years; and one for the term of four years. Their successors shall be appointed for terms of four years; if a vacancy occurs otherwise than by expiration of term it shall be filled by appointment for the unexpired portion of the term. (Ord. 505).

2.16.060 Advisory Members of Planning Commission.

Advisory members of the Commission shall be the city manager, the city attorney, and the city engineer. The advisory members shall not have the power to vote and their terms shall correspond to their respective official tenure. (Ord. 505).

2.16.070 Chairman and Secretary of Planning Commission.

The Commission shall elect a chairman from its appointed members, and may also elect a secretary who may be an employee of the city. (Ord. 505).

2.16.080 Meetings and Quorum of Planning Commission.

At least one regular meeting shall be held each month on a date selected by the Commission. Four of the appointed members of the Commission shall be required to constitute a quorum for the transaction of the business of the Commission. (Ord. 527: Ord. 505).

2.16.090 Removal from Planning Commission.

Any appointed member of the Commission may be removed by the mayor with the approval of the city council or by a majority vote of the council. (Ord. 505).

2.16.100 Compensation of Planning Commission.

All members of the Commission shall serve as such without compensation. (Ord. 505 (part)).

2.16.110 Powers and Duties of Planning Commission.

It shall be the function and duty of the Planning Commission to prepare and adopt, in accordance with and as provided by the Conservation and Planning Act of the state of California, comprehensive long-term general plans for the physical development of the city of San Rafael, and of any land outside the boundary thereof which bears relation to the city. The plans may be comprised of the following or other and additional plans and maps which may in Commission's judgment relate to the physical development of the city:

streets and highway plan

parking plan
recreation plan
public buildings plan
transit plan

The Planning Commission shall be charged with the duty of making investigations, reports on the design and improvements of proposed subdivisions, and shall have such powers in connection therewith as are outlined in the Subdivision Map Act of the state of California, and the subdivision regulations adopted by the city of San Rafael.

It shall be the duty of the members of the Planning Commission, including advisory members and members of its staff, to inform themselves on matters affecting the functions and duties of the Commission and all planning matters, and, to that end, when authorized by a majority of the Commission, may attend planning conferences, or meetings of planning executives, hearings on planning legislation or matters affecting the master plan or any part thereof, and the reasonable traveling expenses incidental to the attendances shall be charges upon the funds allocated to the Commission.

The Planning Commission shall endeavor to promote public interest and understanding of plans developed, and the regulations relating thereto. It shall be part of its duty to consult with and advise the public officials, agencies, public utilities companies, school boards, civic and other organizations, and with the citizens generally in relation to carrying out the plans.

The Commission shall adopt rules for the transaction of business and shall keep a record of its resolutions, transactions, findings, and determinations, which records shall be a public record. (Ord. 913 (part), 1968: Ord. 505 (part)).