




**SAN RAFAEL CITY COUNCIL STAFF REPORT**

**Department: City Clerk**

**Prepared by: Lindsay Lara, City Clerk** **City Manager Approval:** 

**TOPIC: VOTER APPROVED TAX OVERSIGHT COMMITTEE INTERVIEWS**

**SUBJECT: INTERVIEW APPLICANTS AND MAKE APPOINTMENTS TO FILL THREE FOUR-YEAR TERMS TO THE END OF NOVEMBER 2026 AND TWO TWO-YEAR TERMS TO THE END OF NOVEMBER 2024 ON THE NEWLY ESTABLISHED VOTER APPROVED TAX OVERSIGHT COMMITTEE**

**RECOMMENDATION:**  
Interview the following applicants and make appointments to fill three four-year terms to the end of November 2026 and two two-year terms to the end of November 2024 on the newly established Voter Approved Tax Oversight Committee.

Name
Brian Holcomb
Caleb McWaters
Charles Friede
Edward Labarre
Jared White
Sierra Bloyd
Stephen Roth
Susan Clark
Tracey Broadman

**BACKGROUND:**  
The [Voter Approved Tax Oversight Committee](#) was established on [September 6, 2022](#), which consolidated oversight of all of the City’s voter approved measures into one five-member committee, the Voter Approved Tax Oversight Committee, which would provide independent oversight on all voter approved tax measures. The Committee will establish a meeting schedule upon appointment of members.

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**FOR CITY CLERK ONLY**

**Council Meeting:**  
**Disposition:**

**SAN RAFAEL CITY COUNCIL AGENDA REPORT / Page: 2**

The City Clerk's office opened the recruitment for applications on September 7, 2022, sent the invitation to submit applications to the members of the Special Library Parcel Tax Committee, Cannabis Industry Tax Oversight Committee, and the Measure E 'TUT' Oversight Committee. The City Clerk's office was in the middle of recruitment for the Special Library Parcel Tax Committee and the Cannabis Industry Tax Oversight Committee, so in addition the applicants for those Committee's were informed of the newly established Voter Approved Tax Committee and asked if they would like to have their application used for the Voter Approved Tax Oversight Committee.

**ANALYSIS:**

The City Clerk's office received a total of nine (9) applications for the five (5) vacancies, verified applicant eligibility, and scheduled a Special City Council meeting to conduct interviews. Staff recommends interviewing the applicants and making appointments to the Oversight Committee with staggered terms ending in November 2024 and November 2026.

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

**COMMUNITY OUTREACH:**

The call for applications for the Voter Approved Tax Oversight Committee was advertised through mass email notification, the City website, social media platforms, physically posted at City facilities, sent to members of the Oversight Committee's of Measures D, E and G, and sent to any current applicants for those Oversight Committees.

**RECOMMENDED ACTION:**

Interview the applicants and make appointments to fill three four-year terms to the end of November 2026 and two two-year terms to the end of November 2024 on the newly established Voter Approved Tax Oversight Committee.

**ATTACHMENT:**

1. Nine (9) Applications
2. Voter Approved Tax Oversight Committee Bylaws

#1

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Sunday, October 02, 2022 12:48:32 PM  
**Last Modified:** Sunday, October 02, 2022 12:56:33 PM  
**Time Spent:** 00:08:01  
**IP Address:** 76.218.219.229

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Page 1

**Q1**

Contact Information

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

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**Q3**

Voter Approved Tax Oversight Committee

What Board would you like to apply to?

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Page 3

**Q7**

How long have you lived in San Rafael?

2 years

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**Q8**

Business Information

Company	Spikegadgets
Address	883 Sacramento St
City/Town	San Francisco
ZIP/Postal Code	94108

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Boards and Commissions Application

**Q9** Other (please specify):  
How did you hear about this vacant position? City Manager told me on phone

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**Q10**  
Do you participate in any civic activities? If so, what are they?  
Looking to.

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**Q11**  
List any civic organizations of which you are a member:  
None

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**Q12**  
Education:  
Bachelors degree. IT Management

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**Q13**  
Why are you interested in serving on a board or commission?  
To be involved in my community

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**Q14**  
Describe possible areas in which you may have a conflict of interest with the City:  
Building permits

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**Q15**  
Upload your resume.  
Resume202110310835.pdf (485.8KB)

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Page 4: Demographics

**Q16**   
Ethnicity

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**Q17**   
To which gender do you most identify?

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**Q18**



How old are you?

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# BRIAN S. HOLCOMB

## MANUFACTURING MANAGEMENT PROFESSIONAL

Solution and results driven management professional with over 10 years experience that possesses a unique combination of technical expertise and finely tuned business acumen. Innate ability to identify problematic areas and institute innovative processes that improve quality, enhance production, and reduce expenses. Outstanding employee management skills with passion for coaching, training, and tracking individual and team goals, skills, and success. Thrives in fast-paced environments where attention to detail, steadfast leadership, and unsurpassed quality is the key to team and company success.

### Technical Skills & Competencies:

Production Management | Team Leadership and Coaching | Technical Innovations | Continuous Process Improvements | Solution Delivery | Quality Assurance | Automotive Production Proprietary Systems | Production Variances | Customer Specifications | Inventory Management | Performance Management | Production Auditing | Defect and Machine Repair | Project Management | Complex Problem Resolution | Safety Management and Improvement | MS SQL Server Management Studio | Java | HTML | CSS | SQL | MS Visio | Parrallels Virtual Studio | Eclipse Java Developer | Adobe Creative Cloud Studio | MS Excel | MS Office | MS Access

## PROFESSIONAL EXPERIENCE

### PENUMBRA, INCORPORATED

07/2019-Current

#### *Production Supervisor*

- Responsible for the productivity, safety, and quality of a high-tech biomedical catheter.
- Leads continuous improvement projects.
- Manages risk mitigation activities, along with product delivery, inventory analysis, and metric analysis.
- Applied training and coaching methodologies to safety, quality, and manufacturing processes.
- Developed training and development plans for manufacturing associates
- Maintains standardized gMP training documents.
- Train and maintain staff to gDP.
- Performed audits of training objectives and process SOPs.
- Interview and hire potential product builders.
- Develop and create manufacturing build plans for the department.
- Coordinate product and engineering work orders.

### ATCO INDUSTRIES – Fremont, CA

3/2019 to 6/2019

#### *Operations Manager*

- Supervised and built teams at multiple client sites focused on the process of problem resolution.
- These resolution tasks included sorting inspections, material rework and repair, and quality inspection with the goal of delivering these services using the quickest, most efficient methods, along with auditing of standardized work processes and safety practices.

**BUSINESS BLENDER** – Palo Alto, CA

2018 to 3/2019

***Project Manager/ Consultant***

- Conducted industry-specific research of autonomous and preventative maintenance technologies within the automotive industry.
- Facilitated client interaction and project schedule creation using domain expertise gained from the automotive industry.

**GENERAL MOTORS** – Lansing, MI

2012 to 5/2018

***Team Leader***

Oversee world-class automobile production line utilizing cutting edge technologies with direct oversight for manpower, tooling, resource allocation, safety, and equipment. Successfully manage workforce for the production of 250 to 300 cars daily. Implement continuous process improvements related to quality assurance, tool utilization, and forecasting fluctuations within internal policies and procedures. Identify manufacturing defects and execute repair requirements and maintenance throughout line as needed. Drive cross-functional collaboration and lead interdepartmental communications when implementing process changes and new product introductions. Work closely with union and lead, motivate, and train team to enhance production and maximize efficiencies.

**Notable Achievements:**

- Continuously drive process improvements with innovative methods and resources; evaluate assembly and production needs 4X annually and implement change throughout workforce to effectively optimize production.
- Identified key defect within 2019 model year automobile; communicated with multiple departments to correct and reduced post-production expenses by correcting defect during production.
- Facilitated entire team training consisting of 50+ assemblers and 4-5 team leaders with minimal production downtime; implemented cross-training modules and educated teams on all aspects of jobs.
- Manage employee performance and maintain metrics on each employee detailing level of knowledge, skills, and training; developed goal attainment board to ensure team goals are tracked, audited, and aligned with company.

**DENSO MANUFACTURING OF MICHIGAN** – Battle Creek, MI

1991 to 2011

***Machine Technician******Crane Operator******Production Assembly***

Progressive success throughout tenure leading to an integral role as Machine Technician. Initially hired to assemble automotive components within fast-paced environments followed by heavy duty crane operation for the manufacture of automotive condensers. Based on success and skill level, promoted to Machine Technician to facilitate the improvement of quality and tools on a daily basis. Continuously implemented innovative processes during machine and tool repair that enhanced productivity. Liaised between production, Journeyman Repair, and Engineering team.

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**EDUCATION AND PROFESSIONAL DEVELOPMENT**


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PURDUE UNIVERSITY GLOBAL | CHICAGO, IL

**BACHELORS DEGREE, INFORMATION TECHNOLOGY MANAGEMENT****ASSOCIATE DEGREE, APPLIED SCIENCE IN INFORMATION TECHNOLOGY***CONCENTRATION IN MULTIPLATFORM SOFTWARE DEVELOPMENT | SUMMA CUM LAUDE*

KELLOGG COMMUNITY COLLEGE | BATTLE CREEK, MI

**MACHINE TECHNICIAN PROGRAM**

#1

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, October 12, 2022 8:13:53 AM  
**Last Modified:** Wednesday, October 12, 2022 8:27:13 AM  
**Time Spent:** 00:13:20  
**IP Address:** 165.225.243.89

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Page 1

**Q1**

Contact Information

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

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**Q3**

Voter Approved Tax Oversight Committee

What Board would you like to apply to?

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Page 3

**Q7**

How long have you lived in San Rafael?

Approximately 20 months

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**Q8**

Respondent skipped this question

Business Information

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**Q9**

How did you hear about this vacant position?

Other (please specify):  
City of San Rafael Website

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**Q10**

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

I vote! I also have done tutoring and mentoring previously.

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**Q11**

List any civic organizations of which you are a member:

None....yet.

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**Q12**

Education:

BS Civil Engineering

MS Industrial Administration

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**Q13**

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

As a new community member, I'd like to start serving the community in which I live.

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**Q14**

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

None

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**Q15**

Upload your resume.

Caleb-McWaters-Resume.pdf (109.1KB)

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Page 4: Demographics

**Q16**

Ethnicity

[REDACTED]

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**Q17**

To which gender do you most identify?

[REDACTED]

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**Q18**



How old are you?

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## PROFILE

Leader and Construction Project Executive with experience managing a diverse suite of public and private construction projects largely in Northern California.

- Comprehensive project management experience including estimating, preconstruction, teambuilding of the management team, budgeting/scheduling, and subcontracting for projects greater than \$100M annually.
- Strong leadership, personnel management, and communication skills; 13+ years experience leading wide-range of project engineers, project managers, and field supervisors to create effective project teams.
- Utilize all current CM software including Primavera 6, HCSS (Heavyjob/Heavybid), Bluebeam, AutoCAD, and Sage 100.

## EDUCATION

Professional Engineer, Civil Engineering (CA License #84992)  
Board for Professional Engineers, Land Surveyors, and Geologists, December 2015

Certified Project Management Professional (PMP #1582962)  
Project Management Institute, February 2013

Master of Science, Industrial Management (1-Year MBA)  
Krannert School of Management, Purdue University, August 2011

Bachelor of Science, Civil Engineering  
US Coast Guard Academy, New London, CT, May 2008

## EXPERIENCE

### Project Executive (*Anvil Builders Inc.*)

April 2021-Present

- Westside Pump Station Reliability Improvements \$50.5M  
3-Year project to improve SFPUC's wastewater reliability by providing new backup power and essential mechanical/HVAC equipment. Work largely consists of installing new bar screen assemblies, 54" knife gate valve and associated steel piping, construction of new concrete CIP electrical building and retaining wall, electrical power systems, equipment, appurtenances including PG&E metering unit and substations with switchgear and transformers, VFD's, rooftop photovoltaic, associated site civil work.
- Alameda Creek Recapture Project \$19.5M  
Project to install (4) 350-hp pumps within an existing collection pond to allow future SFPUC use of Alameda Creek runoff throughout the Sunol water distribution network. Project includes new electrical building and all associated power systems and equipment, 36"/16" welded steel pipe and gate valves, 12" HDPE pipe, floating mooring/pump barges and anchorages, and all site security and civil work.

### Project Manager (*Anvil Builders Inc.*)

February 2017-April 2021

- *DB-129.2 Bay Corridor Transmission and Distribution Phase II (South)* **\$31M**  
2-year Design-Build project for SFPUC to install ~8,000 liner feet of High and Medium Voltage duct bank in San Francisco. Worked with owner and subcontracted engineering firm to execute this design-build project from 35% design through the completion of construction. Work included 5 Pilot-Tube Guided Auger boring operations (36/54") under Union Pacific and SF-Muni railroad tracks and over 60,000 LF of conduit installation. Other associated work included relocation/installation of 12" AWSS pipe and 8" ductile iron (PUC water).
- *Presidio QMR Culvert Installation* **\$10M**  
Work was to install new concrete CIP culvert under Mason Street in the Presidio SF to allow tidal flows from Crissy Marsh to communicate to upland areas and storm runoff back through the marsh into the bay. Work consisted of relocation or removal of existing utilities, sheetpile shoring and excavation, temporary bypass water system installation, concrete installation, grading of wetlands, and all associated site civil and restoration work.
- *Paradise Debris Clean-up* **\$81M**  
In response to one of the largest wildfire disasters in the history of the US (Camp Fire), managed one of the 3 contractors tasked with performing the debris clean-up efforts. With very little notice assembled a project team and presence onsite and began debris offhaul with 5-crew. At peak production managed 17 crews, over 150 employees, and over 220 truckers daily. Within 4 months the bulk of the work was completed totaling 1.9M tons safely offhauled.
- *Woolsey Fire Debris Clean-Up* **\$14M**  
Simultaneously with the Paradise Debris clean-up, managed a second debris clean-up effort in southern California. Although there was obvious overlap, the difficulties in accessibility and local union issues made this project extremely challenging. Work was similarly completed safely and with respect to all homeowners and those affected by the tragedy.
- *Lower Crystal Springs Stilling Basin Outfall* **\$6.5M**  
Environmentally friendly project to construct new fish passage for San Mateo Creek and included other mechanical improvements. Enabling work included a temporary creek diversion and biological sensitive species relocation. Mechanical work included new 24" ductile iron pipe, 72" linestop, 12"/24" gate valves and associated piping.
- *Cherry Dam Outlet Works Rehabilitation* **\$7M**  
Award Winning project to rehabilitate a remote dam outlet facility (Hetch Hetchy) including replacement of 66" fixed cone valves, repair of 84" butterfly valves, ancillary valves and 18" welded steel piping systems, structural concrete, PLC panel and electrical installation, and underwater diving operations. Project was awarded the San Francisco Collaborative Partnering Award (2018) for infrastructure projects <\$10M for exemplifying excellence in team problem solving.
- *Putnam 48" Welded Steel Pipe Watermain Replacement* **\$5.5M**  
Installation of 1300 ft of 48" welded steel pipe, 200 ft of sliplined 36" welded steel pipe, and 1800 ft of 8" ductile iron pipe and water services. Project included steep San Francisco slopes, overhead wires, utility crossings, coordination with sister utilities, and local community interaction throughout.
- *Sunol Valley Water Treatment Plant Powdered Activated Carbon System* **\$6.5M**

Construction of new Powdered Activated Carbon storage and feed system including two 80,000-gallon reinforced concrete tanks, 40-HP mixers, feed and transfer pump systems, mechanical piping and valves, electrical and instrumentation, and civil/site work. Project is under fixed timeline to accommodate scheduled plant shutdowns. Project will successfully integrate new water treatment system into fully operational plant.

- City of Sonoma Watermain Replacement \$2.5M  
Installation of 2600 ft of new 8" PVC watermain on HWY 12 in Sonoma including new fire and water services. Night work project required creative and flexible management, successfully completed on time and under budget.
- Potrero Power Plant Underground Utilities \$1M  
Work completed for PG&E in support of the remediation of Potrero Power Plant. Scope included demolition and restoration of underground utilities including electrical, storm sewer, and oily water. Additionally, completed reinforced 300-CY concrete slab to accommodate ISS batch plant cement tanks.

**Senior Project Engineer** (*Anvil Builders Inc.*)

**July 2016 – February 2017**

- PG&E Shoreline Restoration Project \$17M  
Cradle to grave ownership of a time critical and highly sensitive remediation and construction project. Managed tight schedule and design-build architecture program to execute project within competing California wildlife work windows. Self-performed all concrete including architectural flatwork, wall foundations, and architectural seawall construction. Additionally, self performed all underground utility installations including domestic water service and reclaimed irrigation. Leveraged electrical, miscellaneous metals, and grading subcontractors. Developed and managed detailed P6 project schedule and managed biweekly design coordination meeting. Worked closely with PG&E environmental consultants to ensure Naturally Occurring Asbestos controls were successful and sensitive plant and bird communities were protected. Utilized local hire workforce to achieve local community hiring goals.

**Civil Design Engineer** (*U.S. Coast Guard*)

**August 2015 – July 2016**

- Perform full suite of project design activities including site investigations, specification and drawing preparation, cost estimating, and environmental/contracting coordination.
- Provide technical engineering support during contract bidding and negotiations.
- As construction manager, ensures strict contract adherence, liaison for all stakeholders, performs QA, evaluates modifications, and manages invoices and payment of contractors.

Managed Large Portfolio of USCG Facilities values at \$25M:

- Waterfront Inspections and Maintenance Program Manager for USCG West Coast (37 facilities).
  - o Ensure contract inspections are complete on all US Coast Guard waterfront assets including piers, wharfs, floating docks, and load bearing structures.
  - o Create commercial maintenance contracts to correct deficiencies discovered.
  - o Generate cohesive response to emergency casualties within tight timelines to ensure critical Coast Guard response operations remain available.
- Tower Program manager for USCG West Coast (186 towers).
  - o Leads maintenance and repair contracts for all towers on rotating schedule.
  - o Leads climber safety courses as primary safety officer, students qualified to climb 90'.

**Industrial Manager** (*U.S. Coast Guard*)

**August 2011 – July 2015**

- Led 3 distinct industrial departments through a period of volatile organizational change including the stand-up of a nationally centralized work center, changing organizational structures, and complete overhaul of all business processes. Ensured consistent and high quality work was produced throughout.
- Self performed \$3M in civil construction, repair, and naval repair work annually.
- Contributed valuable recommendations to the improvement of metrics, the efficiency of work processing and how to integrate three separate timekeeping systems.
- Greatly improved processing times for required preconstruction paperwork.
- Supervised 45 diverse tradesmen and administrative staff at 3 geographical sites. For 1 year, managed 8 direct reports, ensuring pay, evaluations, and administrative work was completed in addition to normal responsibilities.
- Led execution of multiple projects at one time, balanced workforce to ensure on-time delivery. - Accountable for final review of all plans and estimates for projects, ensuring cost and scope accuracy prior to award.
- Daily use of Primavera P6 project management software to monitor and de-conflict schedule and resource allocation.

**Assistant Engineer Officer** (*U.S. Coast Guard*)

**May 2008 - June 2010**

Onboard a medium endurance Coast Guard cutter, led two engineering divisions with increased responsibility throughout, culminating in command of the engineering department (35 engineers) during a 2-month patrol.

- Ensured proper operation and maintenance of the electrical, HVAC, auxiliary water, sewage, and emergency response machinery on board a 270' Coast Guard Cutter.
- Government contract representative for 17 work items during 3-month dry dock project for a \$50M CG asset. Ensured QA, specification adherence, and drafted contract modifications. Dry dock was completed on time allowing vital Coast Guard asset to return to service.
- Qualified Underway Officer of the Deck and Engineer of the Watch within first year.

#3

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, September 07, 2022 9:17:22 PM  
**Last Modified:** Wednesday, September 07, 2022 9:28:59 PM  
**Time Spent:** 00:11:36  
**IP Address:** 98.37.28.71

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Page 1

**Q1**

Contact Information

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

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**Q3** Voter Approved Tax Oversight Committee

What Board would you like to apply to?

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Page 3

**Q7**

How long have you lived in San Rafael?

7 years

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**Q8** Respondent skipped this question

Business Information

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**Q9** Other (please specify):  
How did you hear about this vacant position? Current member of Cannabis Oversight Committee

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**Q10**

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

Current member of San Rafael Cannabis Oversight Committee

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**Q11**

List any civic organizations of which you are a member:

Coalition of Sensible Taxpayers (COST)

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**Q12**

Education:

BA in Economics; MBA.

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**Q13**

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

I am interested in learning more about how city government works, and I would like to help ensure that tax revenues are spent as intended.

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**Q14**

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

No conflicts

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**Q15**

Upload your resume.

**C Friede Resume Sept 2022.pdf (157.4KB)**

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Page 4: Demographics

**Q16**

Ethnicity

[REDACTED]

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**Q17**

To which gender do you most identify?

[REDACTED]

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**Q18**



How old are you?

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# CHARLES R. FRIEDE, MBA

## — EXPERIENCED FINANCE LEADER —

Results oriented, hands-on Financial Manager with extensive experience in budgeting, financial analysis, and management reporting in both large and small company environments. Strong analytical and communications skills, coupled with an ability to work closely with senior management on strategic and operational issues. Sees the big picture, able to translate the numbers into clear recommendations for executive action.

## — CORE COMPETENCIES —

- Strategic/Long Range Planning
- Advanced Excel Modeling
- Acquisition Modeling and Analysis
- Executive Presentations
- Team Development
- Hyperion Essbase
- Management Reporting
- Business Support

## — PROFESSIONAL EXPERIENCE —

**BIOMARIN PHARMACEUTICAL** • San Rafael, CA

2014 – 2020

*Director, Finance*

Provide budgeting, analysis, and decision support for multiple groups within \$1.5 billion+ biotech firm

### **Technical Operations Finance:**

Leads Business Support for Quality, Supply Chain, Process Science, and worldwide Capital groups

- Developed generic expense models for use in long-range planning of R&D costs.
- Revamped planning/analytical processes for \$140m+ worldwide capital budget
- Designed an enhanced monthly/quarterly reporting package
- Coordinated planning activities in two manufacturing locations (Novato, CA; Shanbally, Ireland)

### **R&D Finance:**

Financial support for Research, Clinical, Regulatory and Medical Affairs functions

- Responsible for financial leadership of cross functional project teams in oncology and gene therapy
- Hired, developed highly functional team of four (seen as role model of financial support team)
- Implemented streamlined clinical accruals methodology
- Improved sophistication and accuracy of budgets and quarterly forecasts.
- Support for M&A activity including product acquisitions and divestitures.

**TEVA, INC.** • Frazer, PA

2011 – 2013

*Director, Commercial Financial Planning & Analysis*

Oversaw budgeting, analysis, management reporting, and financial support for largest branded products group of major pharmaceutical company.

- Spearheaded quarterly forecasting and annual budgeting process for \$3.7 billion revenue group.
- Provided financial modeling and support for sales and marketing of five promoted products.
- Led team of four through challenging systems changes and business unit integrations at two locations.

**CEPHALON, INC. • Frazer, PA 1999 – 2011 (Merged with Teva, October 2011)*****Director, Corporate Financial Planning & Analysis***

Directed corporate level budgeting, analysis, and reporting in support of rapid company growth.

- Created and managed quarterly forecasting and annual budgeting process as company expanded from under \$100 million to over \$2.8 billion in revenue, and from one US marketed product to 8.
- Established and led Long Range Planning process, including development of P&L, Balance Sheet, and cash flow models.
- Expanded forecasting and reporting models to integrate four major corporate acquisitions.
- Partnered effectively with senior management to provide presentations and analytical support for monthly Executive Committee meetings and quarterly Board of Directors meetings.
- Developed quarterly sales and earnings guidance for analysts and investors.
- Provided critical financial modeling and support for senior management and investment bankers during successful defense against hostile takeover.
- Key player during due diligence and integration phase of merger with Teva Pharmaceuticals.
- Supported Business Development group in analysis and modeling for potential acquisitions.
- Provided Financial Analysis and support for R&D and Commercial collaborations.

**NOVACARE, INC. • King of Prussia, PA****1995 – 1999*****Manager of Financial Analysis***

Managed budgeting, analysis, and management reporting for largest division of \$1 billion + health care firm.

- Implemented new budgeting/reporting system using Comshare (GEAC) multidimensional database.
- Led redesign of reporting, analytical tools triggered by change in Medicare reimbursement process.
- Designed sophisticated staffing models showing impact of productivity and turnover on revenue, expense, and profitability.

**THE FRANKLIN MINT • Franklin Center, PA*****Manager, Planning and Analysis***

Financial, Systems, and Operations work for a privately held \$700 million direct marketing company.

- Developed revenue and profitability models by product line and marketing channel, including analysis of promotion cost, attrition, and bad debt.
- Managed annual budget process for US and Canada, including development of departmental budgets, P&L's, and capital budget for \$400 million division.

**CONTAINER CORPORATION OF AMERICA • Wilmington, DE*****Plant Controller, Plastics Division***

Managed financial operations of small manufacturing business (division of a \$2 billion international firm), including responsibility for financial accounting, cost accounting, fixed asset management, A/P, and A/R.

**— EDUCATION —**

**MBA, Management • University of Virginia • Charlottesville, VA**  
 Colgate Darden Graduate School of Business Administration

**B.A., Economics • University of North Carolina • Chapel Hill, NC**

#5

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Tuesday, September 13, 2022 2:16:06 PM  
**Last Modified:** Tuesday, September 13, 2022 2:43:13 PM  
**Time Spent:** 00:27:06  
**IP Address:** 108.236.115.51

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Page 1

**Q1**

Contact Information

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

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**Q3**

Voter Approved Tax Oversight Committee

What Board would you like to apply to?

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Page 3

**Q7**

How long have you lived in San Rafael?

Thirteen years.

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**Q8**

Business Information

Company I am a retired attorney. Not in business.

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**Q9**

Friend

How did you hear about this vacant position?

---

**Q10**

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

Yes. I am an active member and past President of the Sausalito Rotary Club.

---

**Q11**

List any civic organizations of which you are a member:

Rotary Club of Sausalito

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**Q12**

Education:

Post graduate: Juris Doctorate. Undergraduate: B.A. Psychology

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**Q13**

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

I would like to be of service to this community, and I believe I have the intellectual skills including the analytical and critical thinking skills to assist with tax oversight.

---

**Q14**

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

None.

---

**Q15**

Upload your resume.

**September 2022 Resume.pdf (24.2KB)**

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Page 4: Demographics

**Q16**

Ethnicity



**Q17**

To which gender do you most identify?



**Q18**



How old are you?

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## **EDWARD J. LABARRE**

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Married to Ellen Arbit

Three children: Caroline LaBarre, business management; Elizabeth LaBarre, geophysicist; Zachary LaBarre, Arborist.

### **Education**

Juris Doctorate, California Western School of Law, 1976

B.A. Psychology, San Diego State University, 1973

### **Profession: Private Practice Attorney**

Currently licensed in Colorado and California state and federal courts and admitted to practice in the Ninth Circuit Federal Court of Appeals and the United States Supreme Court..

Previous occupations included: ranch hand, auto mechanic, machinist, carpenter and residential construction superintendent.

### **Professional Experience:**

#### **2003 to Present:**

Private practice in California and Colorado. Recent cases include civil litigation including prosecution of civil rights cases, construction contracts, defense and prosecution of civil claims and appeals, criminal cases including assistance with the prosecution and defense of homicide cases, the defense of an employment lawsuit, the prosecution of mechanics liens, and consultation on land development and building construction..

**1981-2003** Private law practice in Colorado Springs, CO. The practice included insurance defense of claims brought against building contractors and municipal districts, the prosecution of various civil cases including civil rights cases, criminal defense and workers compensation cases.

**1977-1980** Deputy City Attorney for the City of Colorado Springs, Colorado. Responsibilities included misdemeanor prosecution, ordinance drafting, land use enforcement and oversight, civil claim review, and the defense of civil cases.

### **Noteworthy Published Appellate Cases**

Dixon v. Richer and Yarbrough, 922 F2d 1456 (10<sup>th</sup> Cir. 1991) Application of the Fourth Amendment in police brutality cases was extended and defined.

Carter v. Lovelace, 844 P2d 1288 (Colo. App. 1992). The opinion distinguished assumption of the risk from comparative negligence

Shipley v. People, 45 P3d 1288 (Colo. 2002). The Colorado Supreme Court *en banc* unanimously held that a mandatory 24 year sentence did not preclude a sentence to probation or some other alternative to a prison sentence. After the Colorado Supreme Court's opinion was rendered, the trial court reduced Defendant's 24 year prison sentence to probation.

Rantz v. Kaufman and Levinson, 109 P.3d 132 (Colo. 2005). The Colorado Supreme Court *en banc* unanimously held that a convicted defendant did not have to obtain post-conviction relief before filing a lawsuit against the attorneys who represented him in the underlying criminal case.

### **Honors and memberships:**

Rotary Club of Sausalito, President 2018-2019  
Nominated by Rosa Parks for recognition by the National Campaign for Tolerance.  
Attended the National Security Seminar at the Army War College, Carlisle Barracks..

### **Civic Service**

Current member of the Board of Directors of the Sausalito Rotary Club.  
Former member of the Board of Directors of the Rotary Housing Corporation, overseeing two Sausalito senior housing complexes from 2014 to 2020.  
Former member of the Board of Directors of the Rotary Club of Sausalito Charitable Foundation, Inc. 2017 - 2021

Volunteer for ExtraFood delivering food to many Marin County needy recipients including senior centers, Buckelew Programs, Family Center Schools, Saint Vincent de Paul, Whistlestop, Marin Services for Men, Ritter House San Rafael, and New Beginnings, Novato, from May 2018 to present.

Attended and participated in Jared Huffman Town Hall Meetings in San Rafael.

Service on Eagle Board of Review for potential Eagle Scouts, August 2018 to present.  
Served on Colorado Springs Teen Court 2000 to 2002.  
Served the Sausalito General Plan Advisory Committee and participated in Sausalito City Council meetings regarding the Sausalito General Plan.

### **Hobbies and Interests**

Sailing. Certified by the American Sailing Association to skipper multihull and monohull bareboats offshore, including charter sailboats.  
Horses and mules.  
Foreign and domestic travel and touring.



#2

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, September 07, 2022 8:20:41 PM  
**Last Modified:** Wednesday, September 07, 2022 8:50:38 PM  
**Time Spent:** 00:29:57  
**IP Address:** 104.28.124.35

---

Page 1

**Q1**

Contact Information

First and Last Name	Jared White
Address	[REDACTED]
City/Town	San Rafael
State/Province	CA
ZIP/Postal Code	94903
Email Address	[REDACTED]
Phone Number	[REDACTED]

---

**Q3** Voter Approved Tax Oversight Committee

What Board would you like to apply to?

---

Page 3

**Q7**

How long have you lived in San Rafael?

Since 2018

---

**Q8** Respondent skipped this question

Business Information

---

## Boards and Commissions Application

### Q9

How did you hear about this vacant position?

**City Manager's Newsletter,**

Other (please specify):

I've been applying to a few boards to find a place I can add value and serve my community, and originally applied to the cannabis tax board - I was informed that it was being consolidated so I am assuming this is the result of that.

---

### Q10

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

I've been trying too!

---

### Q11

List any civic organizations of which you are a member:

N/A - but I am trying to get involved and am passionate about community change efforts by the community - change comes collectively from within! I am actively participating and a member of some politically neutral "voter information" groups to help get more participation in the civic process nationally as well.

---

### Q12

Education:

Bachelors degree

---

### Q13

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

I believe that everyone has a duty to step up and contribute to their community - I want to be part of affecting change for good for the next generation and I want to be a part of giving back so that the Marin my son inherits is better than the one my wife has grown up in and I have inherited from her - our family has deep roots and I want to honor those by advocating and participating in the process

---

### Q14

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

Nothing I can think of! I am no longer working for Apple, my current employer is a destination services provider that helps people relocate and settle in their new home - I am an Area Operations Manager for Northern Bay Area south through San Francisco.

---

### Q15

Upload your resume.

**Jared+White+Resume+2022+a.pdf (1.3MB)**

---

Page 4: Demographics

**Q16** [REDACTED]  
Ethnicity [REDACTED]

---

**Q17** [REDACTED]  
To which gender do you most identify?

---

**Q18** [REDACTED]  
How old are you?

---



# JARED WHITE

## Relevant Work Experience

APPLE, INC - 2014 - Present

## PROFILE

Accomplished and driven People Leader with a keen focus on the customer experience and a proven track record of measurable and scalable success to support company priorities. Skilled in driving engagement in my team, and developing careers through empowerment.

## Selected Skills

Driving Results  
People Leadership  
Data Analysis and Support  
Customer Experience  
Interviewing, Hiring, Staffing, Onboarding  
Scaling Processes and Systems  
Limited Front End Dev : HTML / CSS / PHP  
Microsoft Office / G-Suite / Apple Hardware & Software  
Tableau / Medallia / KRONOS

## Education

Bachelors of Fine Arts : Illustration  
California College of the Arts

## Hobbies & Interests

- Society of Illustrators New York Awards Shows (2014, 2015)
- Carpenter, Woodworker, Craftsman
- Accomplished Drummer, Local Bay Area Music Scene

## Manager (Technical Support & Retail Store Operations)

Nov. 2021 - Present

- Manage Operations and Inventory Specialists responsible for back end systems and processes supporting San Francisco Retail location
- Ensure operational readiness and excellence across multiple teams in inventory, systems, and preservations
- Manage critical tasks and key issues over appropriate teams
- Investigate and resolve inventory discrepancies or system outages
- Ensure team is accountable to results in dynamic and complex environment

## Manager (Technical Support / B2B)

2017 - Nov. 2021 :

- Managed Technical Support team serving over 1100 customers per week.
- Created a performance and self-development culture around ever evolving company priorities to meet or exceed complex KPIs.
- Created scalable structure for interviewing, hiring and training platform for support team of 60+ technicians.
- Managed B2B sales team focused around creating sustainable revenue pipeline for Apple@Work Business.
- Managed technical support team of varying skill levels and technical savvy. Responsible for one of the highest performing teams in technical service accuracy and customer satisfaction in 33 retail stores
- Directly responsible for 15-20 cross functional team members.
- Responsible for performance and strategy of Support Experience of 60+ technician organization, both in customer facing queues, repairstrategy, and “backstage” systems that support Customer Experience
- Managed scheduling, staffing, queuing system strategy, and KPIs in highly ambiguous environment.
- Acting Senior Manager for largest Retail Location in San Francisco Market 2021-2022
- Retail at Home Experience Manager during COVID-19 pandemic responsible for ensuring clear objectives and performance management for team members supporting customers remotely



# JARED WHITE

## PROFILE

Accomplished and driven People Leader with a keen focus on the customer experience and a proven track record of measurable and scaleable success to support company priorities. Skilled in driving engagement in my team, and developing careers through empowerment.

## Selected Skills

Driving Results  
People Leadership  
Data Analysis and Support  
Customer Experience  
Interviewing, Hiring, Staffing,  
Onboarding  
Scaling Processes and Systems  
Limited Front End Dev : HTML /  
CSS / PHP  
Microsoft Office / G-Suite /  
Apple Hardware & Software  
Tableau / Medallia / KRONOS

## Education

Bachelors of Fine Arts : Illustration  
California College of the Arts

## Hobbies & Interests

- Society of Illustrators New York Awards Shows (2014, 2015)
- Carpenter, Woodworker, Craftsman
- Accomplished Drummer, Local Bay Area Music Scene

## Sales Coaching Lead

### 2017 - Promoted to Manager

- Developed sales training platforms, lead pilot programs that influenced company strategy, gathering and delivering positive and constructive feedback, and managing Genius Bar technical support queues and sales floor resource management.
- Team Lead focused on driving company sales & experience priorities through development and coaching of sales team.
- Drive for results - team was consistently top performing for company priorities including new program adoptions, ownership opportunities, and services adoption.
- Lead out best practices for sales team and set the standard for performance culture

## Retail Team Lead : Marketing and Events Career Experience

- Team Lead for planning and executing large corporate events and product launches.
- Create clear direction for retail teams from continental U.S. for individual roles in executing highly visible Apple Events, both at Apple Campus and other convention centers
- Worked directly with Marcom and Events team around event management strategies including managing crowds, attendee experience, and compliance with privacy policies

## Senior Sales Rep & Trainer

### 2014 - 2017 (promoted to Sales Coaching Lead):

- Established and set the standard for a new company wide training role.
- Created and delivered internal training that demonstrated new products and services.
- Helped strategize, develop, and execute a community hub in a street side location that integrated Apple products & services priorities into educational sessions based on customer needs both for consumers and businesses.
- Lead training platform for B2B sales team with local businesses to deepen relationship with Apple.
- Sales expert with emphasis on new business account acquirement and individual contributor exceeding all KPI goals
- Apple Business Team Specialist responsibilities included new account outreach, account management, and outreach campaigns focused on reinvigorating previously dormant accounts.

#1

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, September 08, 2022 8:22:10 PM  
**Last Modified:** Thursday, September 08, 2022 8:34:07 PM  
**Time Spent:** 00:11:56  
**IP Address:** 98.45.129.230

---

Page 1

**Q1**

Contact Information

First and Last Name	Sierra Bloyd
Address	[REDACTED]
City/Town	San Rafael
State/Province	CA
ZIP/Postal Code	94903
Email Address	[REDACTED]
Phone Number	[REDACTED]

---

**Q3** Voter Approved Tax Oversight Committee

What Board would you like to apply to?

---

Page 3

**Q7**

How long have you lived in San Rafael?

34 years

---

**Q8** Respondent skipped this question

Business Information

---

**Q9** Social Media

How did you hear about this vacant position?

---

**Q10**

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

Jury Duty

---

**Q11**

List any civic organizations of which you are a member:

N/A

---

**Q12**

Education:

BA - UC Davis

Teaching Credential - Cal Poly San Luis Obispo

Paralegal Certification - UC San Diego

---

**Q13**

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

I am a lifelong San Rafael resident and want to contribute to my community's well-being. I believe that my combined background in public service, education, and law could be of benefit to the Tax Oversight Committee.

---

**Q14**

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

N/A

---

**Q15**

Upload your resume.

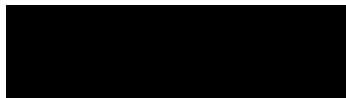
2022 Resume - S.Bloyd.pdf (110.1KB)

---

Page 4: Demographics

**Q16**

Ethnicity



**Q17**

To which gender do you most identify?



**Q18**



How old are you?

---



## Sierra S. Bloyd

### SUMMARY

- Litigation paralegal with significant experience in class action securities litigation. Experienced in all stages of litigation and filing in state, federal district, and appellate courts. Natural problem solver with excellent interpersonal skills, a strong focus on attention to detail, and a desire to learn and grow from every experience.

### PROFESSIONAL EXPERIENCE

#### **Robbins Geller Rudman & Dowd LLP, San Francisco, CA**

*Litigation Paralegal* | **OCTOBER 2018 - PRESENT**

*Appellate Paralegal* | **MARCH 2019 - PRESENT**

*Lead Appellate Paralegal* | **JUNE 2021 - PRESENT**

- Support attorneys in all stages of litigation; manage numerous cases simultaneously; ensure all deadlines are met.
- Collaborate and communicate effectively with partners, associates, of counsel, legal assistants, litigation support specialists, and document clerks regarding all assigned cases and court filings.
- Cite check and proofread briefs and discovery documents prior to filing or service; review relevant state or federal and local rules and ensure compliance; draft motions, declarations, proposed orders and additional required ancillary documents; file in state, federal district and appellate courts; facilitate delivery of courtesy copies to courts and service of documents on opposing counsel.
- Facilitate and track service of incoming and outgoing discovery; maintain detailed logs of all discovery related documents and correspondence.
- Case-related research including: eDiscovery content analysis through Relativity platform; identify and track related cases; compile relevant news articles, public disclosures and SEC filings.
- Assist antitrust and derivative teams with cite checking, proofreading, and filing.
- Participate in and actively contribute to frequent meetings with teams for all assigned cases; participate in and actively contribute to monthly paralegal meetings.
- Train new paralegal hires in all aspects of civil litigation and firm best practices; train litigation paralegals in appellate practices.

#### **Del Mar Heights Elementary, San Diego, CA**

*Sixth Grade Teacher* | **AUGUST 2017 - JUNE 2018**

- Prepare curriculum attuned to students' unique learning needs, utilizing a variety of learning tools and modalities, based on appropriate Common Core Standards; collaborate effectively with sixth grade teaching team; participate in continuing education and training; assess student progress.
- Teach students how to use Google applications, including but not limited to: Google Drive, Docs, Sheets, Slides, Forms, and Gmail.

**Sierra S. Bloyd**



**Willow Creek Academy, Sausalito, CA**

*Fifth & Sixth Grade Teacher* | **AUGUST 2015 - JUNE 2017**

- Facilitate learning in all content areas; collaborate with fifth and sixth grade teaching teams to create new curriculum and plan effective, engaging units that meet all students' needs; encourage parent and community engagement.
- Create and implement a curriculum for teaching students how to use Google applications, including but not limited to: Google Drive, Docs, Sheets, Slides, Forms, and Gmail.
- Assist Head of School with planning daily, school-wide morning assemblies.
- Develop an after-school reading intervention program for second grade students.

**EDUCATION**

- **University of California, Davis** | September 2006 - June 2010  
*B.A. Sociocultural Anthropology, Communications*
- **California Polytechnic State University, San Luis Obispo** | September 2012 - December 2013  
*Multiple Subject Teaching Credential*
- **University of California, San Diego Extension** | June 2018 - September 2018  
*ABA Approved Paralegal Certificate*

#1

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Wednesday, September 07, 2022 1:59:40 PM  
**Last Modified:** Wednesday, September 07, 2022 2:16:16 PM  
**Time Spent:** 00:16:36  
**IP Address:** 73.222.41.124

---

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]

---

**Q3**

Voter Approved Tax Oversight Committee

What Board would you like to apply to?

---

---

Page 3

**Q7**

How long have you lived in San Rafael?

20 years

---

**Q8**

Business Information

Company	Carmelsoft
Address	1050 Northgate Dr., Suite 360
City/Town	San Rafael
ZIP/Postal Code	94903

---

## Boards and Commissions Application

**Q9**

How did you hear about this vacant position?

Other (please specify):

Currently serve on Cannabis Industry Tax Oversight Committee, so heard from Lindsay Lara about the expanded role.

---

**Q10**

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

1. Cannabis Industry Tax Oversight Committee since 2020
  2. Treasurer, Marin Swim League youth swimming club: Swimarin
  3. President, San Rafael High School Athletic Boosters
  4. Served on the San Rafael City Schools Measures B & C Committee in 2022
  4. Various leadership positions in organizations dealing with my profession
- 

**Q11**

List any civic organizations of which you are a member:

1. Cannabis Industry Tax Oversight Committee
  2. Treasurer, San Rafael youth swim league: Swimarin
  3. President, San Rafael High School Athletic Boosters
  4. Various leadership positions in organizations dealing with my profession
- 

**Q12**

Education:

Bachelor of Science in Engineering and Business: U. of Pennsylvania

MBA: U. of Cincinnati

---

**Q13**

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

I already serve on the Cannabis Industry Tax Oversight Committee (since 2020), and I am interested in continuing to serve in this role in the proposed expanded format.

I like being involved with the community, and this is one way that allows me to help out the City of San Rafael.

---

**Q14**

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

None

---

**Q15**

Upload your resume.

Resume\_SBR.pdf (524.8KB)

---

Page 4: Demographics

**Q16**

Ethnicity

[REDACTED]

---

**Q17**

To which gender do you most identify?

[REDACTED]

---

**Q18**

How old are you?

[REDACTED]

---

## Stephen B. Roth

A seasoned entrepreneur, software product manager, and software engineer.

### RELEVANT PROFESSIONAL EXPERIENCE:

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

1. Secured a U.S. Department of Energy Small Business Innovation and Research (SBIR) grant to develop a scalable web-based software tool that will allow Building Information Modeling and building performance tools to communicate with one another, all in the name of making it easier to design energy efficient buildings.
2. Developed and licensed mobile and tablet-based software applications (iOS / Android) for field-based building energy audits and other HVAC engineering analysis. We have licensed 300,000+ mobile apps worldwide to date.
3. Licensed 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.
4. Developed 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.
5. Developed highly-complex 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.
6. 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 12-years since Carmel has been developing mobile software, we have licensed and customized over \$4.0 million worth of mobile applications over the Apple App and Google Play stores.

**gbXML.org** (<https://www.gbxml.org>), San Rafael, CA (November 2009 - Current): Founder and 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. Helped 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. Secured over one million dollars 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. Worked with 55 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. Maintained 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. Conducted quarterly webcasts to 1000s of stakeholders by featuring software tools that integrate with gbXML

6. Developed a web-based validation tool and SDK so BIM authoring tool and building analysis vendors are able to check their gbXML integration
7. Created "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 created a community of 1000s of architectural/engineering stakeholders to better understand how to utilize BIM and analysis software to model building energy usage.
9. Worked with Autodesk, Georgia Tech University Department of Engineering, and Rensselaer Polytechnic Institute (RPI) to develop a validation website.

**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 50 to aid in development, documentation, and marketing of Revit MEP
4. Met with customers to acquire requirements for Revit MEP
5. Worked with management to align the direction of the software tool with corporate goals
6. Worked with the Green Building Studio team to integrate it with Revit MEP
7. 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 (Standards Committee): 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: Corresponding Member, TC 7.6: Data Interoperability Schemas
- ASHRAE: Corresponding Member, MTG-CYB: Cybersecurity and HVAC
- 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: Corresponding Member, Building EQ Committee
- ASHRAE: Past Voting Member, SGPC 20: Documenting HVAC&R Work Processes and Data Exchange Requirements
- International Building Performance Simulation Association (IBPSA-USA): Active in Building Data Exchange Subcommittee to establish data modeling standards
- ASHRAE: Past member of ASHRAE SPC-205
- Active member of United States Green Building Council (USGBC)
- Past 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>)
- Limited partner in high-technology venture capital fund
- 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

TECHNICAL STRENGTHS:

Software Languages and Related:	C++, C#, Python, PHP, Objective-C, Java, Javascript, HTML, SQL, XML, Solidity
Databases:	MySQL, Microsoft SQL Server
Integrated Development Environments and Related:	Visual Studio Code, Microsoft Visual Studio, XCode, Android Studio, Jupyter Notebook, Anaconda, Git, GitHub, JIRA,
Software Libraries and Frameworks:	Node.JS, Various AI python libraries, Infura
Other:	Microsoft Azure

EDUCATION:

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

Master of Business Administration in Finance and Operations Management

**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.



#2

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, February 17, 2022 2:02:46 PM  
**Last Modified:** Monday, February 28, 2022 1:57:16 PM  
**Time Spent:** Over a week  
**IP Address:** 73.170.99.186

---

Page 1

**Q1**

Contact Information

First and Last Name	Susan B Clark
Address	[REDACTED]
City/Town	San Rafael
State/Province	CA
ZIP/Postal Code	94903
Email Address	[REDACTED]
Phone Number	[REDACTED]

---

**Q2**

Cannabis Industry Tax Oversight Committee

What Board would you like to apply to?

---

---

Page 3

**Q6**

How long have you lived in San Rafael?

7 years

---

**Q7**

Business Information

Company	The Shift Network
City/Town	Petaluma
ZIP/Postal Code	94952

---

**Q8**

**City Manager's Newsletter**

How did you hear about this vacant position?

---

**Q9**

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

Yes, I volunteer for Marin Villages, helping older people age in place.

---

**Q10**

List any civic organizations of which you are a member:

Marin Villages

---

**Q11**

Education:

Masters in Communication Innovations from Ithaca College.

---

**Q12**

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

I've wanted to join a committee for the last couple of years. I'd like to help keep and nurture the great community San Rafael is far into the future.

---

**Q13**

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

I don't believe that I have any current conflicts of interest.

---

**Q14**

Upload your resume.

**Susan B Clark Resume 2022.pdf (434.4KB)**

---

Page 4: Demographics

**Q15**

Ethnicity



**Q16**



To which gender do you most identify?

---

**Q17**



How old are you?

---



# SUSAN B CLARK

CONTENT CREATOR

## ABOUT

I'm a scrappy, nimble, and curious content creator/strategist with a track record of successfully developing and monetizing engaging content for high-profile web properties in news, entertainment, e-commerce, and education.

## CONTACT DETAILS

[Redacted contact information]

## APPS & TOOLS I USE

Adobe Creative Suite	ClickFunnels	BuzzSumo
AVID	SEMRush	Figma
Final Cut	Salesforce	Trello
Autodesk Fusion 360	Hootsuite	Gain
Asana	Basecamp	Jira

## EDUCATION

**Ithaca College**  
Masters of Science - Communications Innovation

**Florida-Atlantic University**  
Bachelor of Arts - Humanities & Journalism

## AFFILIATIONS

Writers Guild of America, East  
Producers Guild of America  
Academy of Television Arts & Sciences  
GLAAD - Former Board Member & Treasurer

## SKILL SET

### CONTENT >

- Write blogs, scripts, ad campaigns, marketing collateral, etc.
- Create video content that drives conversions and engagement
- Lead content marketing creative strategy that reaches targeted audiences in unique and differentiated ways
- Drive content creation by using social intelligence and analytics to inform future topics and optimize engagement
- Vision and ability to translate stories to multimedia
- Passionate about social media with a track record of delivering growth that ties back to the brand
- Understands drivers of engagement and how to tap into social media, user-generated content, and influencer marketing

### E-LEARNING >

- Strategize content of new programs with internationally renowned faculty (from Rollin McCraty and Matthew Fox to Russ Hudson and Robert Peng) and write corresponding marketing copy for courses ranging from 'Healing Racism' to 'Bee Shaminism'

## WORK HISTORY

**The Shift Network - Sr. Campaign Strategist & Copywriter**  
Petaluma, CA | 8/2020 - Present

**WhoWhatWhy.org News Org - Associate Editor**  
Virtual Location | 4/2020 - 3/2021

**Zazzle - Director of Content**  
Redwood City, CA | 2014 - 7/2020

**eBay Advertising / Triad - Director of Content**  
San Jose, CA | 2011 - 2014

**Cluck Productions - Co-Founder / Content Producer**  
Larkspur, CA | 2007 - 2011

**The Tonight Show with Jay Leno - Head of Digital**  
Burbank, CA | 2001 - 2007

**Jay Leno's Garage - Co-Producer**  
Burbank, CA | 2006 - 2007

**Access Hollywood.com - Co-Managing Editor**  
Burbank, CA | 2001 - 2002

**Spiderdance - Senior Producer**  
Venice Beach, CA | 2000 - 2001

**Sony Online - Senior Producer / Game Designer**  
Culver City, CA | 1999 - 2000

**GTE MainStreet Interactive TV - Senior Producer**  
Santa Monica, CA | 1995 - 1999

### NEW YORK WORK EXPERIENCE:

Merkley Newman Harty - Exec. Assistant

WNET / Channel 13 (PBS) - Coordinating Producer

Late Night with David Letterman (NBC) - Assistant

MacNeil/Lehrer NewsHour - Newsdesk Assistant

#5

COMPLETE

**Collector:** Web Link 1 (Web Link)  
**Started:** Thursday, January 27, 2022 4:28:29 PM  
**Last Modified:** Thursday, January 27, 2022 4:31:32 PM  
**Time Spent:** 00:03:03  
**IP Address:** 98.45.128.173

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**Q1**

Contact Information

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

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**Q2**

Cannabis Industry Tax Oversight Committee

What Board would you like to apply to?

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**Q6**

How long have you lived in San Rafael?

5 years

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**Q7**

Business Information

Company	Outpost Real Estate
Address	14 Elizabeth Way
City/Town	San Rafael
ZIP/Postal Code	94901

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**Q8**

**City Manager's Newsletter**

How did you hear about this vacant position?

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**Q9**

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

I volunteer at the Food Bank

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**Q10**

List any civic organizations of which you are a member:

NA

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**Q11**

Education:

BA degree

Real Estate Licensed Broker Certification

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**Q12**

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

I want to be more involved with and in my community.

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**Q13**

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

I can't think of any

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**Q14**

Upload your resume.

**Broadman CV 2022.pdf (124KB)**

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Page 4: Demographics

**Q15**

Ethnicity



**Q16**



To which gender do you most identify?

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**Q17**



How old are you?

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# Tracey Broadman



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## Experience

**2011-Present** **San Francisco and Marin**  
**Broker Associate**

Sales, purchases and leases for local clients, both residential and commercial.

**2010-2012** **Los Angeles/New York/London/Bahamas**  
**Owner, President**  
**BGlobal Real Estate**

Real estate company catering to high net worth individuals with global needs including luxury residential, vacation and investment opportunities. Manage all aspects of the transaction from identifying the location, assisting in negotiations and managing the project after purchase.

**2009-2011** **Beverly Hills, CA**  
**Associate Broker**  
**Westside Estates Agency (WEA)**

Sales, purchases and leases for local clients, both residential and commercial. Up to date on state of the art interactive technology and network sites. Have the breadth of both local and global connections in a variety of capacities, including brokers, owners, attorneys and service providers.

**2007-2009** **Los Angeles, CA**  
**Broker**  
**mint Real Estate (formerly a division of mint Lifestyle)**

Created mint Real Estate brokerage with the owners of mint Lifestyle, creating a separate division to handle members' real estate requests worldwide. Managed day-to-day operations and created global contacts in all categories—including residential, hotel/resort, commercial and development. Examined and evaluated prospective opportunities for clients and members. Assisted in development of luxury niche website to display properties to a select market. Managed agents' files and fielded all real estate related inquiries. Negotiated commercial lease.

**2004-2007** **West Hollywood/Studio City, CA**  
**Owner/Broker/Manager**  
**Windermere Properties, Inc.**

Created a boutique real estate company in Los Angeles with a business partner, including budgets, P&Ls, build-out, hiring/retention of staff and agents (65), management of day-to-day operations, marketing and advertising. Broker of Record for the company, responsible for all files. Developed and presented all education and training for the company. Maintained knowledge of real estate law, local economies, fair housing laws, and types of available mortgages, financing options and government programs. Acted as an intermediary in negotiations between buyers and sellers over property prices and settlement details, and during the closing of sales. Negotiated commercial lease and project managed build out of 9000 square feet.



**2001-2004**  
**Sales Associate**  
**DBL/Sothebys International**

**West Hollywood, CA**

One of the top sales professionals in the Sunset office. Demonstrated consistent ability in negotiating and closing transactions. Built a successful network based on marketing and referrals. Exceptional service and organizational skills with all clients.

### **Prior Experience**

**1999-2001**  
**Manager of Business Development**  
**Vivaldi Networks (start-up digital receipt technology company)**

**Menlo Park, CA**

**1996-1999**  
**Manager Stars Restaurant**

**San Francisco, CA/Singapore**

### **Affiliations**

**2008-2011**  
**Director-Beverly Hills Greater Los Angeles Association of Realtors (BHGLAAR)**

**Current:**  
**Member NAR**  
**Member CAR**

### **Education**

**UCLA**  
**Boston University**  
**University of Massachusetts**  
**University of Tennessee**

### **References:**

<b>Brent Thomson</b>	<b>415.380.2126</b>	<b>personal and professional</b>
<b>Atul Patel, MD</b>	<b>415.254.0807</b>	<b>personal</b>

Tracey Broadman  
[REDACTED]  
[REDACTED]  
[REDACTED]

October 14, 2017

Dear Soon to be Employer,

I am writing to you and applying for this position knowing that I am disregarding the instruction of having previous five star hotel and or managing house managers experience. I believe I am an exception to this baseline. I was in the five star restaurant management world for 17 years, having started that part of my career in Boston, migrated it to San Francisco and then to Singapore. I managed the day to day operations, including P&Ls, vendors, projects, employees of up to 50, created manuals of operation and conduct, addressed all aspects of hospitality and was the face of the business with the public. After my career in restaurants, I worked in the tech industry for three years for Vivaldi, a digital receipt entity in Menlo Park. The founder of the company saw the value in my point of sales experience and hired me at the manager of business development. In that position, I was able to hone my “do not take no for an answer” skills as I called upon C-level executives to beta test our product with consumers. I learned to listen, both to the client, the customers and the engineers internally, which made me a better communicator in my life, both professionally and personally. I then moved to Los Angeles, where I began my brokerage career. I learned every aspect of the business, received my brokers license, and eventually opened my own brokerage, the Windermere franchise, in an A building on Sunset Boulevard. Here I learned the art of recruiting, educating the agents, managing protocol and compliance, and navigating through immense competition. The opportunity that followed Windermere is one that completed the training I needed for this position. I worked with mint lifestyle, opening up their brokerage division and was involved in all aspects of HNW real estate, travel and purchasing. Mint was a membership based service that gave members access to best minds in travel, retail, unique experiences and real estate—a one stop luxury nexus. I was exposed to hotel, estate, investments on a worldwide scope. I created a network that allowed me to connect members with each other that helped further business and personal goals.

I am tech savvy, understand the lifestyle of HNW families, a clear communicator, kind hearted and generous of spirit, cultured and well-traveled, well spoken with great presentation skills, highly organized, well connected, self-reliant will being resourceful, and a good person. I know the Bay Area extremely well (having lived here from 1989-2001 and 2011-present), including restaurants, venues, service providers, contractors, designers, etc. If I don't know something, I am incredibly resourceful and persistent ... and won't stop until I have found the right fit for any given circumstance. My real estate knowledge, both of the market and of individual homes, will also be a value-add for this position. I am truly ready to jump in and be the liaison that creates a seamless line of communication between the staff of your residences and you.

I welcome the opportunity for an interview at your convenience. I know my resume does not fit in accordance with the guidelines you have outlined but most success stories are created by those that don't conform.

Best,  
Tracey

# VOTER APPROVED TAX OVERSIGHT COMMITTEE BYLAWS

## ARTICLE I. NAME AND PURPOSE

**Section 1.1. Name.** The name of this body shall be the City of San Rafael Voter Approved Tax Oversight Committee, hereinafter referred to as the “Committee.”

**Section 1.2. Purpose.** The Committee’s purpose is to review the collection and expenditure of voter approved tax revenues collected under the authority of voter-approved City tax measures and Resolution 15118 adopted by the San Rafael City Council on September 6, 2022.

**Section 1.3. Committee Responsibility.** The Committee’s authority is oversight only.

The responsibilities and duties of the Committee shall be limited to:

- 1.2 Review expenditures of Measure tax revenues to ensure the monies have been expended in accordance with the authorized municipal purposes of each Measure. To complete this review, the Committee shall:
  - 1.2.1 Understand allowable expenses of each existing Measure’s tax funds (as identified in the enacting Municipal Ordinance)
  - 1.2.2 Review documentation from City Council and from City Council-appointed advisory committees that pertain to the prioritization of use of each Measure’s tax funds.
  - 1.2.3 Review annual reports prepared by the City’s Finance Department that track the receipt and spending of each Measure’s tax funds.
  - 1.2.4 Prepare and submit to the City Council and the community an annual public report on the expenditures of each Measure’s tax revenues for the previous fiscal year.
  - 1.2.5 Fulfill the final responsibilities of each Measure’s responsibilities at the Measure’s termination, repeal or extension: Before submitting a final report: Review and report on the final expenditures of each Measure during the previous fiscal year, through its termination, to ensure that monies have been expended consistent with the authorized purposes of the Measure.

The Committee shall **not**:

1. Have any budgetary decision authority, shall not allocate financial resources, and shall not make budget or service recommendations to the City Council.
2. Have authority to direct, nor shall it direct, City staff or officials.

## **ARTICLE II. MEMBERSHIP**

**Section 2.1. Number of Members.** The Voter Approved Tax Oversight Committee shall consist of five (5) voting members.

**Section 2.2. Eligibility.** Members of the Committee shall be at least 18 years of age and reside within the City limits.

**Section 2.3. Appointment of Committee Members.** Members shall be appointed by the City Council. Appointments shall be published on the website for the City of San Rafael in accordance with Government Code Section 54973, as amended from time to time.

**Section 2.4. Terms of Appointment.** Each member shall serve a minimum term of four (4) years. An effort will be made to ensure that the terms are staggered, and not all of the appointments expire in the same year.

**Section 2.5. Term Limits.** Members shall be limited to two (2) consecutive four-year terms. Additional terms may be served if there is a break between terms.

**Section 2.6. Absence and Removal.** An unexcused absence from two (2) consecutive Committee meetings without notification to the Staff Liaison will constitute an immediate vacancy and shall be considered a voluntary resignation from the Committee. Previously dismissed Committee members may be eligible for reappointment.

**Section 2.7. Compensation.** Members shall serve without compensation.

## **ARTICLE III. MEETINGS**

**Section 3.1. Time and date of Regular Meeting.** Notification of meeting place, date, and time shall be rendered to the public through posting on the City of San Rafael website.