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OAKLAND

2020 SEP 24 P 5: 06

CITY OF OAKLAND



CITY HALL • 1 FRANK H. OGAWA PLAZA, 3rd FLOOR • OAKLAND,
CALIFORNIA 94612

Office of the Mayor
Honorable Libby Schaaf
Mayor

(510) 238-3141
Fax (510) 238-4731

Letter of Appointment

September 8, 2020

The Honorable City Council
One Frank H. Ogawa Plaza, Second Floor
Oakland, CA 94612

Dear President Kaplan and members of the City Council:

Pursuant to City Charter Section 601, the Mayor has reappointed the following persons as members of the following board or commission, subject to City Council confirmation:

Budget Advisory Commission

Marchon Tatmon to serve a first three- year term beginning October 1, 2020 and ending September 30, 2023, filling the seat previously held by himself.

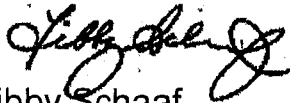
Brenda Roberts to serve a three- year term beginning October 1, 2020 and ending September 30, 2023, filling the seat previously held by herself.

Joseph Macaluso to serve a three- year term beginning October 1, 2020 and ending Septèmber 30, 2023, filling the seat previously held by Geoffrey Johnson.

Vincent Leung to serve a three- year term beginning October 1, 2020 and ending September 30, 2023, filling the seat previously held by himself.

Thank you for your assistance in this matter.

Sincerely,

A handwritten signature in black ink, appearing to read "Libby Schaaf". The signature is fluid and cursive, with a large initial "L" and "S".

Libby Schaaf
Mayor

Profile

Marchon Tatmon
First Name Middle Initial Last Name

.com
Email Address

Oakland CA 94603
City State Postal Code

Home: (510) Mobile: (510)
Primary Phone Alternate Phone

San Francisco-Marin Food Bank Government Affairs Manager
Employer Job Title

Which Boards would you like to apply for?

Budget Advisory Commission: Appointed

Interests & Experiences

Please tell us how your qualifications and participation will relate to the requested board and/or commission's mission.

I'm a community leader with over a decade of putting myself on the line for the betterment of the community, I'm an Oakland native whose career is built on mentoring, teaching, financial literacy, housing the unhoused, and feeding those in need by not only being on the frontline but also being on the back end, influencing, creating and or supporting policy with our local, county, state and federal officials as a Government Affairs Manager who focus is policy and advocacy. Such as AB 3073 that help increase CalFresh enrollment for those who just been released from incarceration, the expansion of CalFresh online for those who don't feel safe going to grocery stores during COVID, supporting AB 3088 that reduces people from being evicted, or AB 826 that increase access to food for all, I support tenant-right protections. I have several degrees, a BA in Political Science, a Masters in Public Administration. I'm working on my Doctorate in Public Administration and Policy. I currently serve as a Commissioner on Oakland's Budget Commission, I spearheaded the Homeless Housing Resource Center in Alameda, and also served as the emergency warming shelter manager, helping to provide more than 1,000 beds in the winter months with a combined budget over a million. I have the expertise and prior budgeting experience. I'm the definition of a true public servant and I am honored to be able to help our most vulnerable community members and our under value workforce here in Oakland because if I was in the same situation, I will want someone there for me. My core vision is to make Oakland policy, sustainable, healthy, and prosperous for everyone; this includes policies that make Oakland free from violence, homicide, pollution, and an Oakland in which every resident thrives and is housed. Also, an Oakland that is financially solvent

Please submit your resume or curriculum vitae. You may upload a document. (A Word format is preferred.) Alternatively, you may paste the text of your resume in the field provided below.

Updated Resume Copy 2020.docx

Upload a Resume

Please paste the text of your resume or curriculum vitae below.

Please click the acknowledgement below.

Service on City of Oakland boards, commissions, and committees may require filings of the FPPC's Statements of Economic Interest (Form 700). Upon appointment and determination of filing status, I will comply with all filing obligations.

I Agree *

Marchon Tatmon

Address:

Home:

Summary

Energetic self-starter and accurate multi tasker; seeking a challenging career where I can display useful skills learned throughout years of experience; in hopes of working closer with the public and management in order to better serve the community and programs, while gaining and learning new vital experiences, training and knowledge.

Education

Doctorate: Public Administration and Policy – Current - 2021, GPA 3.64
Walden University – Distant Learning

Masters: Public Administration, Jan. 2016, GPA 3.83
(Alpha Beta Kappa Honor Society)
Kaplan University - Distant Learning

Bachelor of Arts: (Political Science, Minor Psychology) May 2007
University of Tulsa - Tulsa, Ok, USA

UNDECIDED (Transferred) May 2005
Chabot College - Hayward, Ca, USA

High School Diploma: June 2003
Castlemont High School - Oakland, Ca, USA

Highlights

- Mayor of Oakland 2018 Candidate
- Have advance intensive training in Strategic Context Public Management, Research Theory, Design & Methodology, Statistical Quantitative Reason and Analysis, Analyst Evidence-Based Decision Making, Public Policy and Finance and Sustainable Community Development.
- Master's in Public Administration Classes taken- Human Resource and Management, Finance, Budget, Grants, Advance Writing, Leadership in Non-Profits.
- Domestic Violence Counselor 2016
- Canvasser through Clean Water Action 2016
- Castlemont High School District 7, Oakland- Education Advisory Board 2016.
- Oakland District 6th Education Advisory Board for Frick Middle School 2015.
- Highly regarded for my ability to multi-task, and work well under pressure and time constraints.
- Help in reading campaign for Elementary Schools in Tulsa, Ok. "Making it cool to read"

- Capability to adjust or adapt to any situation with great communication and writing skills.
- Volunteer for the Model Neighborhood Project Highland Hospital in Oakland, Ca.
- Volunteer at the African American Museum and Library in Oakland, Ca.
- Able to establish and maintain successful working relationships with management, customers, and employees.
- Volunteer at Ira Jenkins/Brookfield Recreational Center in Oakland, Ca.
- Circle of excellence 2014 AAA sells recognition Bronze
- An active volunteer for Councilman Reid of Oakland 7th district since 2003
- Computer skills include Microsoft Office, Access, Microsoft Management, Google Docs, PowerPoint, Photo Shop and Word Perfect.
- Salesforce and MRM proficient
- Alpha Beta Kappa Honor Society

Accomplishments

- Awarded a full athletic scholarship to the University of Tulsa (2005)
- All Conference Cornerback at Chabot Community College (2004/2005)
- Graduated High School as a Honor Roll Student (2003)
- High School football All Conference member (2002/ 2003)
- Employee of the month for AIL
- All contributor Presidential club AIL over \$150,000 in new yearly premium
- All club for AAA selling incentive Circle of Excellence over 200k written new premium
- Alpha Beta Kappa Honor Society- 2015 (Kaplan University)
- Sigma Kappa Si Honor Society- 2018 (Walden University)
- Clubs trips because of performance includes: Bahamas, Hawaii, Miami, Las Vegas.

Experience

(Government Affairs Manager)

Sept 2019 - current

San Francisco-Marín Food Bank - San Francisco/ Marin County offices

- Coordinate legislative efforts by working with state, local, Marin and San Francisco County, and federal governments as well as the media.

- Help the SF-Marin Food Bank meet legislative goals by creating policy proposals and working with government agencies and citizens
 - Directly responsible for a group of staff members.
 - Perform research, manage internal and external communication, and contact various media outlets
 - Prepare reports and presentations to deliver within and outside the organization
 - Also present findings externally.
 - Write talking points and often serve as a point of contact for the media.
 - Represent the organization at industry forums and events.
 - Travel in order to fulfill job duty.
 - Write policy briefs
 - Head of Food Bank digital Advocacy and Political outreach

(Alameda Housing Resource Center and Winter Warming Shelter Outreach Manager)

October 2018- Sept 2019

Building Futures - Remote office Alameda, CA/ Home Office San Leandro, CA

- Manager of the emergency winter warming shelter for the unhoused.
 - Provide leadership and supervision necessary to coordinate outreach team and office staff of 20 for the city of Alameda C.A.R.E program.
 - Develop outreach schedule, respond to community partners for outreach request, and provide oversight and direction to staff providing services.
 - Act as liaison between city and county collaborative partners including Police, Fire, EMT, hospitals, other non-profits, Code Enforcement, etc.
 - Budgetary responsibility.
 - Manager of the Alameda Warming Shelter. Control day to day operations
 - Assist in developing materials, budget, assessment tools, job descriptions, and other program processes/documents/tools for the Alameda CARE Project Program.
 - Supervise the Homeless Outreach Support Specialist to ensure adherence to the maintenance schedule.
 - Conduct activities related to interviewing, hiring, firing, and disciplinary actions.
 - Ensure overall program compliance to HIPPA guidelines.
 - As needed, provide direct services to participants. Services to include but not limited to intake, assessment, brokerage, outreach and engagement, referrals, and rehabilitative services.
 - Provide support to staff when dealing with participant's crisis.
 - Provide training and oversight to staff's case notes, billing, HMIS, and other data collection/entry.
 - Process timesheets, PTO requests, mileage, and reimbursement.
 - Facilitate regular case conferencing meetings. Assist in coaching staff and in ongoing skill development efforts.
 - Develop professional relationships with other agencies.
 - Assist in developing policy and procedures.
- Work with other agency programs such as Welcome Home San Leandro, HSP, Linkages and Oakland Family Front Door.

- Provide outreach to community and engagement to clients, community agencies, and receive referral both over the phone and walk-ins.
- Provide statistical data as well as narrative information as needed for board reports, funding reports, grants, etc.
- Ensure that all members are meeting the goals as set-forth in their program's respective grants.
- Housing the homeless

(Oakland Family Front Door Lead Housing Specialist/ Navigator)

April 2016 to October 2018

Building Futures -Remote office 250 Frank Ogawa Plaza Oakland, CA / Home office San Leandro, CA

- To provide case and emergency management and coaching to program participants.
- Provides case management, coaching, assessments and develop case plans; also determines eligibility by working closely with participants and staff.
- Canvass neighborhoods in order to find permanent housing for the homeless, women and domestic violence survivors: network with property owners to push the program and garner support.
- Provides updates and assessments to supervisors and make adjustments accordingly.
- Work with external stakeholders such as City of San Leandro and Oakland staff, landlords and rental agents to assist participants in accessing housing.
- Provide Program Management to ensure that programs are being implemented and ran as intended and assist in the development of programs.
- Prepare and run program activity reports using web-based technology, such as Google Sheets, and MS Office Suite software such as excel.
- Participate in reporting as requested by supervisor, including but not limited to evaluating participant outcomes, adjusting as needed, providing demographic, quantitative and qualitative data as needed.
- Work cooperatively with the local networks of support.
- To meet or exceed all applicable goals.
- To provide support as needed and emergency services such as emergency housing, hotel vouchers and rental bills and food assistance to ensure that BFWC continues to be a safe haven for homeless men, women and children.
- Provide consultation services and evaluations regarding emergency situations
- Act as a team member and or outreach staff, assisting in other programs or with other duties as assigned.

(Life Insurance/Marketing Specialist)

June 2010 to September 2015

AAA (America Automobile Assoc.) - Oakland, CA

- Oversee the development and management of the AAA insurance brand, ensuring consistent presentation of the AAA brand across all distribution channels and all customer communication.
- Engage members and give them consultations of the importance of purchasing Life Insurance.
- Design and share marketing campaigns and materials with AAA partner clubs and provide capabilities and support to optimize club agency marketing activities.
- Ensure database is robust to provide current and future analytics needs to support direct sales and other marketing activities.
- Define, assist in the development, implementation and evaluation of new and creative strategies and or policies to lead and grow direct sales channel in coordination with the overall insurance company growth goal.
- Provide strategic direction, program management and evaluation, planning, organization and leadership within the direct sales organization through effective planning and oversight, analysis, action planning, product recommendation, and plan implementation.
- Cashier, Customer Service Specialist, Credit Card/ Bank Account payment processor.
- Prepared, wrote, organized documents and presentations in order to display group progress and growth.
- Memberships Acquisitions
- Salesforce and MRM proficient

(Supervising Life Insurance Agent)

July 2007 to June 2010

American Income Life Insurance Company - Concord, CA

- In charge of delivering, selling and signing up union members life insurance and supplemental health insurance during their group enrollment period and also in charge of researching new ideas on marketing strategies within the office.
- Also responsible for interpreting and analyzing data recommending solutions to administration Create presentations for meetings; come up with solutions for certain scenarios and unexpected problems, organized and wrote reports, recommendations and responses to upper management.
- Data entry and creation of weekly income base off production and results also responsible for handling sensitive information such as social security numbers and bank accounts.
- Answering calls using a multi-phone system provided telephone support and also house calls support.

- Usually multi-tasking, thinking analytically and high pressure is an everyday occurrence in this job.
- Supervised and train new employees on selling insurance and budgeting for business cost.
- Cashier and Payment processor, and selling into fortune 500 Unions throughout California
- Prepared, wrote, organized documents and presentations in order to display group progress and growth.
- Provide consultation services and evaluations regarding emergency situations
- Provide emergency management services.
- Compensation, program and policy Analyzed
- Administrated Assistant to the Regional President

(Supervising Sorter/ Customer Service Agent)

August 2003 to December 2004

U.P.S - Oakland, CA

- Responsible for accurate shipment of packages, organization and data entry.
- Work at a high speed but within the employment safety and procedures guidelines.
- Make sure that trailers were well maintain and presentable and also correctly loaded and a safe manner.
- Prepared, wrote, organized documents and presentations in order to display group progress and growth.
- Train new employees on daily operations and customer service, attended to customer and employees needs and also assisted management when service was needed.
- Problem solved and also thought of new ways to better the system.
- Cashier, Sorter and Customer Service Supervisor

(Intern)

February 2003 to August 2003

Youth Development of Law - Berkeley, CA

- Attend class once a week to learn helpful strategies about politics at Boalt law school.
- Reported to city hall to work with council member Larry Reid of Oakland 7th District. Wrote reports and responses to elected officials and constituents.
- Observe and learn tactics on managing, budgeting and maintaining a city. Organized legal documents getting them ready for presentations and meetings.
- Built strong working and lifetime relationship with staff.

Profile

Brenda D Roberts
First Name Middle Initial Last Name

att.net
Email Address

Street Address Unit 201
Suite or Apt

Oakland CA 94618
City State Postal Code

Mobile: (510) Mobile: (510)
Primary Phone Alternate Phone

Employer Consultant
Job Title

Which Boards would you like to apply for?

Budget Advisory Commission: Submitted
City Planning Commission: Submitted

Interests & Experiences

Please tell us how your qualifications and participation will relate to the requested board and/or commission's mission.

I am an accomplished professional with skillsets in accounting, auditing, financial analysis, process improvement and governmental budgeting. My tenure as City Auditor has provided me with an in-depth understanding of City departments and agencies, their funding sources and requirements for sustainability. I have a MBA in Finance and I am credentialed as a CPA, a Certified Internal Auditor and Certified Fraud Examiner.

Please submit your resume or curriculum vitae. You may upload a document. (A Word format is preferred.) Alternatively, you may paste the text of your resume in the field provided below.

Brenda Roberts Resume - February 2019.pdf
Upload a Resume

Please paste the text of your resume or curriculum vitae below.

Please click the acknowledgement below.

Service on City of Oakland boards, commissions, and committees may require filings of the FPPC's Statements of Economic Interest (Form 700). Upon appointment and determination of filing status, I will comply with all filing obligations.

I Agree *

BRENDA ROBERTS

@att.net

SKILLS & ABILITIES

Accountant, Auditor, Investigator, Risk & Compliance, Financial Analyst, and Business Improvement Subject Matter Expert

EXPERIENCE

- Jan 2015 to **City Auditor, City of Oakland**
- Dec 2018 · Directed audit department to conduct audits, reviews of City operations
· Managed Whistleblower program; conducted investigations
· **Acknowledged for Exemplary Audit Reporting – Knighton Award - 2016**
- Jan 2014 to **Consultant, Resources Global Professionals**
Dec 2014 · Internal control consulting; risk assessments; fraud assessments
- Apr 2012 to **Internal Audit Director, AAA Northern California Nevada, Utah**
Nov 2014 · Created, developed internal audit department; recruited, hired audit team
· Established Whistleblower program
- Oct 2007 to **Director – Internal Audit, Core-Mark International**
Apr 2012 · Directed and managed Internal Audit department
· Transitioned department from compliance to operational audit group
· Responsible for audit and overview of 12 International divisions & corporate operations
· Directed investigations, special projects
- Other Roles,
Responsibilities · Government: US Inspector General Office – Department of Labor;
City & County of San Francisco
· Academic Institutions: Adjunct Professor – San Francisco State; Golden Gate University
· Other: Safeway, KPMG, Deloitte & Touche, LLP

Brenda Roberts, Resume
February 2019

EDUCATION

MBA - Finance, *Golden Gate University*

Bachelor's Degree – Liberal Arts, University of Nevada - Reno

CREDENTIALS

CPA – California

Certified Internal Auditor

Certified Fraud Examiner

AWARDS

Knighton Award for Exemplary Audit Reporting – 2006; 2016

Exceptional Achievement Award – US Department of Labor

Significant Achievement Award – Deloitte & Touche, LLP

AFFILIATIONS

International Committee – Academic Relations – Institute of Internal Auditors

Institute of Internal Auditors – East Bay Chapter, Past President

Profile

Vincent _____ T _____ Leung _____
First Name Middle Initial Last Name

_____ gmail.com _____
Email Address

_____ Street Address

_____ Suite or Apt

Oakland _____
City

CA _____ 94607 _____
State Postal Code

Home: (617) _____ Home: (617) _____
Primary Phone Alternate Phone

_____ Employer Job Title

Which Boards would you like to apply for?

_____ Budget Advisory Commission: Appointed _____

Interests & Experiences

Please tell us how your qualifications and participation will relate to the requested board and/or commission's mission.

VINCENT T. LEUNG 311 2ND ST., APT. 504 * OAKLAND, CA 94607 * (617) 842-5280
vincent.t.leung@gmail.com January 25, 2017 Greetings, My name is Vincent Leung and I am writing to request the Mayor's consideration for a position on the Oakland Budget Advisory Commission ("BAC"). As a BAC member, I will apply world-class experience and skills that are directly applicable and relevant to the workings and responsibilities of the BAC. These include: * Budgeting, financial planning, analysis, and modeling. Most recently, I led and conducted all budgeting, forecasting, and modeling activities for a growth-stage clean energy startup. Also, in my investment banking and corporate finance roles, I learned how to analyze all facets of an organization's financial condition, strategy, and operations. Throughout my career, I have created original, highly sophisticated models and analyses incorporating complex tax, accounting, regulatory, and cross-border considerations. I strongly believe the BAC will benefit from my experience in leading and having been directly responsible for budgeting and world-class financial analysis throughout my career. * Depth and breadth of financial product knowledge. My experience and deep expertise in finance and financial products allows me to approach the financial governance of any organization with a keen eye for detail and discipline. On the trading floor of a major New York investment bank, I gained intimate familiarity with the workings of equity, debt, swap, and derivative products. As part of a team that created complex new structured products, I analyzed and documented their financial effects, and translated the ideas and concepts behind them into actionable words in the form of marketing materials and legal documentation. I can therefore apply this knowledge for the benefit of the BAC and the City of Oakland by reading between the lines and identifying unseen ramifications of financial products and proposed financial transactions. * Strategic planning and project/deal execution. Also, throughout my career, I have been responsible for the due diligence, valuation, and execution of M&A and strategic opportunities. I have also helped plan joint ventures, participated in internal strategic planning, and monitored developments at individual competitors and in entire industries. I have also successfully led and collaborated with large teams of internal and external constituents in diverse contexts such as strategic planning, capital raises, and M&A assignments. In all my roles, I have worked closely with C-level executives and business heads to deliver my findings and analyses, and to develop budgets, strategic proposals, and business plans. I have also won praise for my teamwork and leadership skills, initiative and work ethic, and verbal and written communication abilities. All these skills will be important in evaluating the City of Oakland's short- and long-term budgeting and financial priorities as a BAC member. I look forward to deploying these qualities and experiences as a productive, value-added member of the Oakland Budget Advisory Commission. For your reference, I have enclosed my resume and a summary of my deal experience. Should you require more information, please feel free to contact me at your convenience at (617) 842-5280 or at vincent.t.leung@gmail.com. Thank you for your time and consideration. With best regards, Vincent T. Leung

Please submit your resume or curriculum vitae. You may upload a document. (A Word format is preferred.) Alternatively, you may paste the text of your resume in the field provided below.

VTL Resume and Cover Letter 2017.01.25 Oak BAC.doc

Upload a Resume

Please paste the text of your resume or curriculum vitae below.

VINCENT T. LEUNG 311 2ND ST., APT. 504 * OAKLAND, CA 94607 * (617) 842-5280
vincent.t.leung@gmail.com SUMMARY Financial professional with substantial additional experience in political and community organizing. Seeking to apply skills in financial analysis, budgeting, modeling, deal structuring, financial product structuring, due diligence, and marketing towards a position on a finance-related public board or commission. EXPERIENCE IMERGY POWER SYSTEMS, INC. – FREMONT, CA SENIOR MANAGER – FINANCIAL PLANNING & ANALYSIS, 2012-2016 * Revamped and expanded corporate financial model at a growth-stage energy storage startup * Ran budgeting and forecasting process, interacting with business heads firmwide and reporting to Board * Coordinated fundraising outreach efforts to potential VC, high net worth, and strategic investors SVB FINANCIAL GROUP (SILICON VALLEY BANK) – SANTA CLARA, CA ASSOCIATE DIRECTOR – CORPORATE DEVELOPMENT, 2010-2011 * Participated in screening, research, modeling, planning, and execution of strategic and corporate initiatives, including ongoing JV/business development efforts in the United Kingdom, China, and India * Monitored and reported on financial and strategic developments at key competitors * Awarded two Special Performance Bonuses for "exceptional team performance" FBR CAPITAL MARKETS & CO., INC. – IRVINE, CA INVESTMENT BANKING ASSOCIATE – FINANCIAL INSTITUTIONS, 2007-2009 * Revitalized coverage of West Coast banks and thrifts by cold-calling CEOs and CFOs, interacting with management and Boards, creating customized strategies, monitoring financial conditions at individual banks, and developing original firm-level, industry-wide, and macroeconomic analyses * Coordinated recapitalization and M&A efforts for banks, thrifts, and mortgage REITs by conducting exhaustive due diligence; modeling forward earnings projections, capital structures, and dilution scenarios; evaluating financials, strategy, and management; and analyzing distressed assets * Helped develop internal framework to estimate bank capital needs, foreshadowing 2009 "stress tests" A.G. EDWARDS & SONS, INC. – SAINT LOUIS, MO INVESTMENT BANKING ASSOCIATE – FINANCIAL INSTITUTIONS & REAL ESTATE, 2006-2007 * Executed capital raises, constructed valuation and earnings models, prepared deal memoranda, and recommended strategies for banks, closed-end funds, BDCs, mortgage REITs, and insurers * Assisted senior officer in covering Midwestern community banks through face-to-face client contact and by preparing financial, valuation, M&A, and capital structure analyses * Reviewed strategic outlook, performed valuations, evaluated potential buyers and sellers, and conducted merger accretion/dilution, purchase price, and IRR analyses for banks and asset managers MERRILL LYNCH & CO., INC. – NEW YORK, NY DEBT MARKETS ASSOCIATE / ANALYST – GLOBAL NEW PRODUCT DEVELOPMENT, 2000-2004 * Built complex models and presentations incorporating cross-border tax, accounting, and regulatory considerations at an industry-leading "think tank" for innovative hybrid capital and structured products * Led a firmwide team, outside counsel, and rating agencies in executing over \$17B in preferred stock offerings for 70 closed-end funds, achieving #1 industry ranking for such offerings in 2003 * Aided development of a new pre-funded liquidity facility; helped execute \$1.8B in offerings of this facility EDUCATION UNIVERSITY OF MICHIGAN – ANN ARBOR, MI * Master of Business Administration, April 2006; emphases in finance and corporate strategy; GMAT: 750 (99th percentile) * Elected officer of Finance Club, Investment Association, and Greater China Association * Local finalist, 2004 A.T. Kearney Global Prize Case Competition DARTMOUTH COLLEGE – HANOVER, NH * Bachelor of Arts, June 2000; major in economics and minor in government POLITICAL / COMMUNITY ** Leader and co-founder of the Alameda County volunteer team for the 2016 Hillary Clinton campaign * Managed 3300+ volunteers across countless phone banks, canvasses, recruiting events, and caravans to other states; recruited and trained additional team leaders * #1 vote-getting Hillary delegate to the Democratic National Convention from California CD 13 ** Senior volunteer for multiple Democratic campaigns * Libby Schaaf for Oakland, CA mayor (2014), Tom Koch for Quincy, MA mayor (2009), Mark Roosevelt for MA governor (1994) * Manned multiple phone banks and canvassed thousands of homes using English and Cantonese ** Past board member of Dartmouth Alumni Association of Silicon Valley (2012); San Jose/South Bay Dartmouth admissions interviewing director (2012-2014); received DAASV president's award for service PERSONAL * Passed Level III of the CFA examination in June 2012 * Started investing at age 11 after self-teaching financial statement, comparables, and M&A analyses

Please click the acknowledgement below.

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I Agree *

VINCENT T. LEUNG

January 25, 2017

Greetings,

My name is Vincent Leung and I am writing to request the Mayor's consideration for a position on the Oakland Budget Advisory Commission ("BAC"). As a BAC member, I will apply world-class experience and skills that are directly applicable and relevant to the workings and responsibilities of the BAC. These include:

- **Budgeting, financial planning, analysis, and modeling.** Most recently, I led and conducted all budgeting, forecasting, and modeling activities for a growth-stage clean energy startup. Also, in my investment banking and corporate finance roles, I learned how to analyze all facets of an organization's financial condition, strategy, and operations. Throughout my career, I have created original, highly sophisticated models and analyses incorporating complex tax, accounting, regulatory, and cross-border considerations. I strongly believe the BAC will benefit from my experience in leading and having been directly responsible for budgeting and world-class financial analysis throughout my career.
- **Depth and breadth of financial product knowledge.** My experience and deep expertise in finance and financial products allows me to approach the financial governance of any organization with a keen eye for detail and discipline. On the trading floor of a major New York investment bank, I gained intimate familiarity with the workings of equity, debt, swap, and derivative products. As part of a team that created complex new structured products, I analyzed and documented their financial effects, and translated the ideas and concepts behind them into actionable words in the form of marketing materials and legal documentation. I can therefore apply this knowledge for the benefit of the BAC and the City of Oakland by reading between the lines and identifying unseen ramifications of financial products and proposed financial transactions.
- **Strategic planning and project/deal execution.** Also, throughout my career, I have been responsible for the due diligence, valuation, and execution of M&A and strategic opportunities. I have also helped plan joint ventures, participated in internal strategic planning, and monitored developments at individual competitors and in entire industries. I have also successfully led and collaborated with large teams of internal and external constituents in diverse contexts such as strategic planning, capital raises, and M&A assignments. In all my roles, I have worked closely with C-level executives and business heads to deliver my findings and analyses, and to develop budgets, strategic proposals, and business plans. I have also won praise for my teamwork and leadership skills, initiative and work ethic, and verbal and written communication abilities. All these skills will be important in evaluating the City of Oakland's short- and long-term budgeting and financial priorities as a BAC member.

I look forward to deploying these qualities and experiences as a productive, value-added member of the Oakland Budget Advisory Commission. For your reference, I have enclosed my resume and a summary of my deal experience. Should you require more information, please feel free to contact me at your convenience at (617) 842-5280 or at vincent.t.leung@gmail.com. Thank you for your time and consideration.

With best regards,

Vincent T. Leung

VINCENT T. LEUNG

vincent.t.leung@gmail.com

SUMMARY

Financial professional with substantial additional experience in political and community organizing. Seeking to apply skills in financial analysis, budgeting, modeling, deal structuring, financial product structuring, due diligence, and marketing towards a position on a finance-related public board or commission.

EXPERIENCE

IMERGY POWER SYSTEMS, INC. - FREMONT, CA

SENIOR MANAGER - FINANCIAL PLANNING & ANALYSIS

2012-2016

- Revamped and expanded corporate financial model at a growth-stage energy storage startup
- Ran budgeting and forecasting process, interacting with business heads firmwide and reporting to Board
- Coordinated fundraising outreach efforts to potential VC, high net worth, and strategic investors

SVB FINANCIAL GROUP (SILICON VALLEY BANK) - SANTA CLARA, CA

ASSOCIATE DIRECTOR - CORPORATE DEVELOPMENT

2010-2011

- Participated in screening, research, modeling, planning, and execution of strategic and corporate initiatives, including ongoing JV/business development efforts in the United Kingdom, China, and India
- Monitored and reported on financial and strategic developments at key competitors
- Awarded two Special Performance Bonuses for "exceptional team performance"

FBR CAPITAL MARKETS & CO., INC. - IRVINE, CA

INVESTMENT BANKING ASSOCIATE - FINANCIAL INSTITUTIONS

2007-2009

- Revitalized coverage of West Coast banks and thrifts by cold-calling CEOs and CFOs, interacting with management and Boards, creating customized strategies, monitoring financial conditions at individual banks, and developing original firm-level, industry-wide, and macroeconomic analyses
- Coordinated recapitalization and M&A efforts for banks, thrifts, and mortgage REITs by conducting exhaustive due diligence; modeling forward earnings projections, capital structures, and dilution scenarios; evaluating financials, strategy, and management; and analyzing distressed assets
- Helped develop internal framework to estimate bank capital needs, foreshadowing 2009 "stress tests"

A.G. EDWARDS & SONS, INC. - SAINT LOUIS, MO

INVESTMENT BANKING ASSOCIATE - FINANCIAL INSTITUTIONS & REAL ESTATE

2006-2007

- Executed capital raises, constructed valuation and earnings models, prepared deal memoranda, and recommended strategies for banks, closed-end funds, BDCs, mortgage REITs, and insurers
- Assisted senior officer in covering Midwestern community banks through face-to-face client contact and by preparing financial, valuation, M&A, and capital structure analyses
- Reviewed strategic outlook, performed valuations, evaluated potential buyers and sellers, and conducted merger accretion/dilution, purchase price, and IRR analyses for banks and asset managers

MERRILL LYNCH & CO., INC. - NEW YORK, NY

DEBT MARKETS ASSOCIATE / ANALYST - GLOBAL NEW PRODUCT DEVELOPMENT

2000-2004

- Built complex models and presentations incorporating cross-border tax, accounting, and regulatory considerations at an industry-leading "think tank" for innovative hybrid capital and structured products
- Led a firmwide team, outside counsel, and rating agencies in executing over \$17B in preferred stock offerings for 70 closed-end funds, achieving #1 industry ranking for such offerings in 2003
- Aided development of a new pre-funded liquidity facility; helped execute \$1.8B in offerings of this facility

EDUCATION

UNIVERSITY OF MICHIGAN - ANN ARBOR, MI

- Master of Business Administration, April 2006; emphases in finance and corporate strategy; GMAT: 750
- Elected officer of Finance Club, Investment Association, and Greater China Association
- Local finalist, 2004 A.T. Kearney Global Prize Case Competition

DARTMOUTH COLLEGE - HANOVER, NH

- Bachelor of Arts, June 2000; major in economics and minor in government

POLITICAL/

- Leader and co-founder of the Alameda County volunteer team for the 2016 Hillary Clinton campaign

COMMUNITY

- o Managed 3300+ volunteers across countless phone banks, canvasses, recruiting events, and caravans to other states; recruited and trained additional team leaders
- o #1 vote-getting Hillary delegate to the Democratic National Convention from California CD 13
- Senior volunteer for multiple Democratic campaigns
 - o Libby Schaaf for Oakland, CA mayor (2014), Tom Koch for Quincy, MA mayor (2009), Mark Roosevelt for MA governor (1994)
 - o Manned multiple phone banks and canvassed thousands of homes using English and Cantonese
- Past board member of Dartmouth Alumni Association of Silicon Valley (2012); San Jose/South Bay Dartmouth admissions interviewing director (2012-2014); received DAASV president's award for service

PERSONAL

- Passed Level III of the CFA examination in June 2012
- Started investing at age 11 after self-teaching financial statement, comparables, and M&A analyses

Project**Role**

Contemplated foreign portfolio acquisition

Developed iterative valuation model incorporating multiple loan loss, synergy, purchase price, and earnout scenarios. Traveled overseas to perform extensive on-site due diligence of loan portfolio, reconciling for differences in historical exchange rates and verifying outstanding balances of individual loans. Identified strategic, financial, and legal concerns throughout the life of the project. Coordinated discussions with third parties such as lawyers and auditors.

Chinese joint venture development

Worked intimately with SVB's China team on continual revisions of internal model and projections for SVB's proposed joint venture with Shanghai Pudong Development Bank. Co-authored concept memos and correspondence sent to both U.S. and Chinese regulators.

India market research

Sole-authored exhaustive research report of market conditions in the Indian venture capital and banking industries in order to update SVB's India business plan. Met with internal SVB constituents to assess existing and future India-related revenue opportunities.

Competitive intelligence

Actively monitored key competitors and industry developments; briefed executives on quarterly earnings updates and major announcements. Produced monthly comparables report and industry news update that was sent directly to the Board of Directors and management committee.

Evaluation of strategic opportunities

Conducted due diligence and reviewed strategic fit on multiple incoming strategic opportunities. Identified one potential strategic opportunity in the course of ongoing market intelligence. Developed merger/IRR models, internal memos, and letters of intent with respect to several opportunities. Helped monitor existing strategic investments.

Cleantech strategy development

Evaluated opportunities for leasing and tax equity investments. Researched opportunities for participation in government lending guarantee programs and co-authored concept memo delivered to the Department of Energy.

Mezzanine debt research

Researched prevailing economics, opportunities, and competitor activity in the mezzanine lending marketplace. Authored initial concept memo that led to the hiring and establishment of a new mezzanine lending team.

Employee development

Actively mentored new employees and interns within the group.

VINCENT T. LEUNG

SIGNIFICANT DEAL EXPERIENCE – FBR CAPITAL MARKETS

Date	Client	Role
4/09-6/09	New management team	Mentored a newly formed management team in analyzing targets, developing regulatory strategies, and modeling capital needs and potential investor returns in connection with the proposed acquisition of a thrift and formation of a subsidiary mortgage company. Performed exhaustive financial, strategic, and management due diligence, and authored a letter of intent, once a desirable target was identified. Developed investor presentation and marketing thesis, and guided management team through a nationwide roadshow.
12/08-1/09	FirstFed Financial Corp.	Conducted detailed analysis of the Bank's option ARM and multi-family loan portfolio. Performed financial and strategic due diligence, including management interviews of all C-level and EVP-level managers. Developed financial and strategic analysis, including detailed "stress test," assessed regulatory outlook, single-handedly authored formal presentations to the Bank's board, management, and regulators, and jointly debated findings with the Bank's Board alongside senior FBR managing directors.
8/08-10/08	Vineyard National Bancorp	Conducted exhaustive financial, strategic, and management due diligence as part of a proposed \$250 million PIPE offering. Single-handedly led due diligence of the Bank's portfolio, including loan-by-loan review with Chief Credit Officer and senior loan officers, and on-site visits to selected properties financed by Bank loans. Built earnings and valuation model from scratch, which was embraced by the Bank's new CEO for marketing purposes. Developed investor presentation and marketing thesis, and guided CEO and Chief Credit Officer through a three-week nationwide roadshow.
3/08-6/08	PFF Bancorp, Inc.	Conducted exhaustive financial, strategic, and management due diligence as part of a proposed \$460 million PIPE offering. Reviewed the Bank's entire distressed loan portfolio, interviewed all C-level, EVP-level, and SVP-level managers, authored large portions of offering memorandum, devised original "stress test," and modeled forward financial projections that determined the offering size. Developed investor presentation and marketing thesis.
3/08	Thornburg Mortgage, Inc.	Constructed forward financial projections, accretion/dilution analysis, and capital needs scenarios, and conducted detailed financial and management due diligence in connection with a sole lead-managed \$1.35 billion senior subordinated note offering and recapitalization, completed despite significant market and financial industry turmoil after the collapse of Bear Stearns.
1/08	Anworth Mortgage Asset Corp.	Constructed forward financial projections and accretion/dilution analysis as part of FBR's due diligence in connection with its co-managed role in a successful \$143.9 million common follow-on offering.
1/08	Thornburg Mortgage, Inc.	Constructed forward financial projections and accretion/dilution analysis as part of FBR's due diligence in connection with its joint lead-managed role in a successful \$64.4 million common follow-on/\$172.2 million preferred follow-on offering.

VINCENT T. LEUNG

SIGNIFICANT DEAL EXPERIENCE – A.G. EDWARDS

Transactions with Significant Execution Role

<u>Date</u>	<u>Client</u>	<u>Role</u>
2006-2007	Fiduciary Asset Management Co.	Integral member of A.G. Edwards internal deal team that evaluated the acquisition of FAMCO. Conducted thorough financial, strategic, and management due diligence and constructed valuation and projections based on multiple growth scenarios. A.G. Edwards was the runner-up bidder for FAMCO but bowed out of the bidding after senior management negotiations broke down. Piper Jaffray later acquired FAMCO at terms similar to those originally proposed by A.G. Edwards, whose terms were steered by my valuation.
5/07	Amcore Financial, Inc.	Developed financial and strategic analysis for the Board in its semiannual review, including analysis of potential acquisition targets.
2/07	Desert Community Bank	Developed financial and strategic analysis for the Board as part of its deliberations in engaging a financial advisor to help sell the Bank.

Profile

Joseph _____ D _____ Macaluso _____
First Name Middle Initial Last Name

Email Address

Street Address Suite or Apt
Oakland _____ CA _____ 94602
City State Postal Code

Mobile: (415) _____ Home: (415) _____
Primary Phone Alternate Phone

Self _____ Consultant _____
Employer Job Title

Which Boards would you like to apply for?

Budget Advisory Commission: Submitted

Interests & Experiences

Please tell us how your qualifications and participation will relate to the requested board and/or commission's mission.

As a former employee in the City Auditor's Office and active resident in local politics, I am quite familiar with the BAC and its important role. Beyond my education that includes a Master of Public Administration, I bring nearly a decade experience managing multi-million dollar government programs.

Please submit your resume or curriculum-vitae. You may upload a document. (A Word format is preferred.) Alternatively, you may paste the text of your resume in the field provided below.

JDM.pdf
Upload a Resume

Please paste the text of your resume or curriculum vitae below.

Joseph Macaluso EDUCATION -Norwich University 2009 - Master of Public Administration (cum laude) - San Diego State University 2003 - Bachelor of Arts EXPERIENCE A LITTLE STRATEGY COMPANY Principal Strategist – Partner 2017-2020 • Serve as firm's principal strategist and oversee client work for non-profits, government agencies, socially conscientious businesses, issue campaigns, political candidates, and public officials, including East Bay Working Families, California Legislative Black Caucus PAC, West Valley Mission Community College District, Foothill DeAnza Community College District, Tides Advocacy, California Water Supply and Water Quality Act, Malia Cohen for Board of Equalization, Deborah Ramirez Family (Kavanaugh hearings), Congresswoman Tulsi Gabbard, BART Board President Lateefah Simon, Hayward Councilmember Aisha Wahab, and Kimberly Ellis for California Democratic Party Chair. • Develop and coordinate response to high profile controversies and crises, such as Peralta

Community College District's bond ratings downgrades, response to State's oversight report, presentation before the Board of Governors, and avoiding the imposition of a super trustee from the State Chancellor's Office. • Design and implement advocacy and outreach campaigns to further civic engagement and awareness around policy, electoral, and legislative issues that impact clients and their respective partner organizations and related campaigns and initiatives, including billion-dollar bond and parcel tax elections. • Provide management consultancy services related to brand cohesion, crisis communications, revenue generation and funding design, executive and board communications, policy and advocacy strategies, fiscal structure, staffing, and operational design, as well as policy and strategic partnerships. • Develop messaging platform, digital marketing, and collateral design, including social media content, press releases, membership communications, direct marketing (mail and digital), speeches, op-eds, website design, grant applications, funding proposals, and donor materials. SUPERIOR COURT OF CALIFORNIA Public Affairs & Special Programs Officer - Santa Clara County 2012-2017 • As a member of the Court's senior management team for the largest court system in Northern California, directed external and internal communications related to issues spanning labor relations to reduction of services. Served as media counsel to 79 judicial officers and the Chief Executive Officer and managed daily operations of Court's communication apparatus, including website content, in-court media requests, public information requests, media queries, social media activities, and creation of internal and external notices, literature, and presentations. • Advised the Presiding Judge and Court leadership on state and local policy matters and intergovernmental relations, as well as guided the Court's outreach and lobby process through the Court's Legislative Liaison Committee. Acted as Court's designated liaison for State legislative offices, municipal and county agencies, non-profit and partner organizations, and general community. • Directed operations of the largest grants and special projects program of California's 58 trial courts, supporting efforts to address systemic and programmatic issues related to mental health, domestic violence, juvenile justice, substance abuse, and recidivism in both adult and juvenile populations. • Appointed Administrator of the Court's Temporary Judge Program, which supports Small Claims, Traffic, Family, and Civil divisions. As program administrator, reviewed all applicants and recommended appointments, investigated complaints of misconduct and impropriety by temporary judges, developed recruitment programs, and oversaw program staff. • As senior staff to the Grants Acquisitions and Review Committee, guided judicial officers and supervisory and technical staff through developing proposals to federal and state grant RFPs and collaborated with external and internal stakeholders on program design and execution. Oversaw the development of RFPs for professional services, initiated recruitment and hiring of staff, as well as reviewed and approved all contracts and requisitions for more than \$8.5 million in outside funding from federal, state, and private entities. • Led the organization's change management for the Court's transition to an electronic case management system, which serves as the backbone of the Court's operations. Developed court-wide employee trainings and workforce enhancement programs aimed at increasing operational efficiency and employee satisfaction. • As an appointed faculty member with the Institute for Court Management, taught administrators from around the country on how to have more meaningful and effective media relations, communications and community engagement programs. • Served as senior staff to judicial policy committees, including Executive, Finance, Legislative Liaison, Community Outreach, and Grants Acquisitions and Review—directing administrative operations in support of policy directives. • Led Court's community outreach activities, including educational programs aimed at K-12 administrators, faith community leaders, elementary to law students, young adults in the juvenile justice system, and general public. City of Oakland – Office of the City Auditor Director of Communications / Assistant to City Auditor 2009-2012 • Oversaw development and administration of the City Auditor Office's budget, as well as all administrative processes, including budget management, contracts and accounts payable/receivable programs, human resources, records retention, and auditing schedule. Managed business and constituent relations, technology procurement, media queries, records request, and the creation of internal administrative policies and processes. • Coordinated the Office's policy and legislative operations, including representing the City Auditor Office at City Council meetings, shepherding items through the committee process, coordinating with the City Clerk's Office on the submission and calendaring of items, creating presentations, and drafting agenda reports. • Recruited, hired, supervised, and evaluated personnel, as well as provided training for both administrative and technical staff. Developed professional enhancement plans, as well as implemented disciplinary actions and termination procedures. • Developed and implemented communication strategies for the City's oversight agency and served as senior advisor to Auditor on state and local policy matters, working with affinity organizations like the League of Cities and ALGA. • Acted as official spokesperson and media contact for the City Auditor Office and served on the City's Emergency Public Information Officer Team, helping the City respond to public safety issues like Occupy Oakland and downtown riots. • Prepared

Auditor for media and public appearances, drafted all speeches and press releases, and developed Office's messaging platforms for more than 30 oversight reports, as well as composed opinion-editorials for the Auditor (San Francisco Chronicle and Oakland Tribune). • Designed and deployed digital media programs, including Twitter and Facebook campaigns, website redesign and social media integration, and Auditor's blog. Directed website content for the Association of Local Government Auditor's 2010 best website award recipient.

Please click the acknowledgement below.

Service on City of Oakland boards, commissions, and committees may require filings of the FPPC's Statements of Economic Interest (Form 700). Upon appointment and determination of filing status, I will comply with all filing obligations.

I Agree *

Joseph D Macaluso, MPA

With nearly two decades' experience in media relations, strategic communications, and public affairs, Joe has had the professional fortune of being in the right place when his specialized skills have been needed the most.

Over his career, while building a reputation for managing the (near) impossible, Joe's greatest successes have come from prevention and planning - stopping problems from happening by implementing realistic and sustainable solutions at the onset. From securing earned coverage to ghostwriting and placing editorials, Joe brings a vast network of press relations and influencers to all client work.

Overseeing both high-profile, state-wide political operations and public programs, Joe brings tested project management experience in overseeing multimillion-dollar budgets and large workforces. With a Master of Public Administration and as a graduate of the former AFL-CIO Organizing Institute, Joe is a certified labor organizer who has served on both sides of negotiations and contract disputes.

Joe is proudly driven by his moral compass and his commitment to social justice. It is what inspired him to seek-out graduate school and begin a career in public service, and it is what keeps him active in local non-profits and state-wide Democratic politics today.

Joe is a delegate of the California Democratic Party (CDP), Co-Chair of the CDP Black Caucus' Bylaws Committee and Co-Chair of the Alameda County Democratic Central Committee's Communication Committee. Beyond his work in justice reform, racial and social equity, and reproductive rights, Joe proudly serves as Vice President of Oakland's Laurel Elementary School Parent Teacher Association.

Before founding A Little Strategy Company, Joe spent nearly a decade in public affairs at the Superior Court of California (Santa Clara County) and City of Oakland. Prior to his Master of Public Administration and starting his career in public service, Joe worked in public relations at Solem & Associates and Fleishman-Hillard, as well as managed political, media, and social marketing campaigns.

EDUCATION

Norwich University 2009
Master of Public Administration (Cum Laude)

San Diego State University 2003
Bachelor of Arts

SPECIAL SKILLS

Digital Content and Stakeholder Engagement

Developed and managed digital content strategy for the City of Oakland, including the creation of a digital content strategy, content management system, and digital content calendar.

Policy Development and Government Relations

Developed and managed policy development and government relations for the City of Oakland, including the creation of a policy development process and government relations strategy.

Public Affairs, Revenue Auditing, and Compliance

Managed public affairs, revenue auditing, and compliance for the City of Oakland, including the creation of a public affairs strategy, revenue auditing process, and compliance program.

Executive Ghostwriting, Speechwriting, and Media Training

Executed executive ghostwriting, speechwriting, and media training for the City of Oakland, including the creation of a ghostwriting process, speechwriting process, and media training program.

CRISIS COMMUNICATIONS

- ▣ Judge Persky/Brock Turner
Managed institutional response to global controversy and coverage
- ▣ Peralta Colleges Ratings Downgrade
Guided District's response and attempt at State takeover
- ▣ Brett Kavanaugh Hearings
Provided media training and counsel to the Deborah Ramirez Family
- ▣ Election Fraud - California Democratic Party
Directed response to national press and served as spokesperson
- ▣ Oakland Council Interference Audit
Coordinated information release and agency's messaging
- ▣ Navajo Nation - Syphilis Outbreak
Conceived and produced multi-channel social marketing campaign

WORK EXPERIENCE

ALITTLESTRATEGY COMPANY

Principal Strategist - Partner

2017-2020

- Serve as firm's principal strategist and oversee client work for non-profits, government agencies, socially conscientious businesses, issue campaigns, political candidates, and public officials, including East Bay Working Families, California Legislative Black Caucus PAC, West Valley Mission Community College District, Foothill DeAnza Community College District, Tides Advocacy, California Water Supply and Water Quality Act, Malia Cohen for Board of Equalization, Deborah Ramirez Family (Kavanaugh hearings), Congresswoman Tulsi Gabbard, BART Board President Lateefah Simon, Hayward Councilmember Aisha Wahab, and Kimberly Ellis for California Democratic Party Chair.
- Develop and coordinate response to high profile controversies and crises, such as Peralta Community College District's bond ratings downgrades, response to State's oversight report, presentation before the Board of Governors, and avoiding the imposition of a super trustee from the State Chancellor's Office.
- Design and implement advocacy and outreach campaigns to further civic engagement and awareness around policy, electoral, and legislative issues that impact clients and their respective partner organizations and related campaigns and initiatives, including billion-dollar bond and parcel tax elections.
- Provide management consultancy services related to brand cohesion, crisis communications, revenue generation and funding design, executive and board communications, policy and advocacy strategies, fiscal structure, staffing, and operational design, as well as policy and strategic partnerships.
- Develop messaging platform, digital marketing, and collateral design, including social media content, press releases, membership communications, direct marketing (mail and digital), speeches, op-eds, website design, grant applications, funding proposals, and donor materials.

SUPERIOR COURT OF CALIFORNIA

Public Affairs & Special Programs Officer - Santa Clara County

2012-2017

- As a member of the Court's senior management team for the largest court system in Northern California, directed external and internal communications related to issues spanning labor relations to reduction of services. Served as media counsel to 79 judicial officers and the Chief Executive Officer and managed daily operations of Court's communication apparatus, including website content, in-court media requests, public information requests, media queries, social media activities, and creation of internal and external notices, literature, and presentations.
- Advised the Presiding Judge and Court leadership on state and local policy matters and intergovernmental relations, as well as guided the Court's outreach and lobby process through the Court's Legislative Liaison Committee. Acted as Court's designated liaison for State legislative offices, municipal and county agencies, non-profit and partner organizations, and general community.
- Directed operations of the largest grants and special projects program of California's 58 trial courts, supporting efforts to address systemic and programmatic issues related to mental health, domestic violence, juvenile justice, substance abuse, and recidivism in both adult and juvenile populations.
- Appointed Administrator of the Court's Temporary Judge Program, which supports Small Claims, Traffic, Family, and Civil divisions. As program administrator, reviewed all applicants and recommended appointments, investigated complaints of misconduct and impropriety by temporary judges, developed recruitment programs, and oversaw program staff.

- As senior staff to the Grants Acquisitions and Review Committee, guided judicial officers and supervisory and technical staff through developing proposals to federal and state grant RFPs and collaborated with external and internal stakeholders on program design and execution. Oversaw the development of RFPs for professional services, initiated recruitment and hiring of staff, as well as reviewed and approved all contracts and requisitions for more than \$8.5 million in outside funding from federal, state, and private entities.
- Led the organization's change management for the Court's transition to an electronic case management system, which serves as the backbone of the Court's operations. Developed court-wide employee trainings and workforce enhancement programs aimed at increasing operational efficiency and employee satisfaction.
- As an appointed faculty member with the Institute for Court Management, taught administrators from around the country on how to have more meaningful and effective media relations, communications and community engagement programs.
- Served as senior staff to judicial policy committees, including Executive, Finance, Legislative Liaison, Community Outreach, and Grants Acquisitions and Review—directing administrative operations in support of policy directives.
- Led Court's community outreach activities, including educational programs aimed at K-12 administrators, faith community leaders, elementary to law students, young adults in the juvenile justice system, and general public.

City of Oakland – Office of the City Auditor
Director of Communications/Assistant to City Auditor
2009-2013

- Oversaw development and administration of the City Auditor Office's budget, as well as all administrative processes, including budget management, contracts and accounts payable/receivable programs, human resources, records retention, and auditing schedule. Managed business and constituent relations, technology procurement, media queries, records request, and the creation of internal administrative policies and processes.
- Coordinated the Office's policy and legislative operations, including representing the City Auditor Office at City Council meetings, shepherding items through the committee process, coordinating with the City Clerk's Office on the submission and calendaring of items, creating presentations, and drafting agenda reports.
- Recruited, hired, supervised, and evaluated personnel, as well as provided training for both administrative and technical staff. Developed professional enhancement plans, as well as implemented disciplinary actions and termination procedures.
- Developed and implemented communication strategies for the City's oversight agency and served as senior advisor to Auditor on state and local policy matters, working with affinity organizations like the League of Cities and ALGA.
- Acted as official spokesperson and media contact for the City Auditor Office and served on the City's Emergency Public Information Officer Team, helping the City respond to public safety issues like Occupy Oakland and downtown riots.
- Prepared Auditor for media and public appearances, drafted all speeches and press releases, and developed Office's messaging platforms for more than 30 oversight reports, as well as composed opinion-editorials for the Auditor (San Francisco Chronicle and Oakland Tribune).
- Designed and deployed digital media programs, including Twitter and Facebook campaigns, website redesign and social media integration, and Auditor's blog. Directed website content for the Association of Local Government Auditor's 2010 best website award recipient.

Consultant/Independent Contractor
Training & Development International
2007-2009 (Graduate School)

- Provided DirecTV, Kimberly Clark, and DP World (Argentina) senior management with executive and internal communications consulting, including content development for communications to global management, corporate reporting presentations, training materials, and speech coaching.
- Managed operations and candidate slate for municipal incorporation ballot measure "Citizens for Carmel Valley – Yes on Measure G," as well as developed comprehensive, media-based knowledge management system project plan for the City of Monterey, as part of graduate thesis.

Solem & Associates
Account Executive
2006-2007

- Created comprehensive U.S. market launch for economic development agency (Paris Region International Mission Enterprise) that included branding strategy, business-to-business marketing, high-level delegation tour, media relations, and gala dinner.
- Lobbied for and assisted with the development of a multi-million dollar proposal for Cemusa's bid for the San Francisco municipal bus shelter contract. Coordinated public opinion research projects, including the Alameda County Congestion Management Agency's traffic mitigation pilot study for Fast Lanes.
- Designed and executed media strategies for clients, including East Cypress Corridor Plan, T.Y. Lin International, Metrolink, Obayashi Corporation, Cleaire Advanced Emission Controls, and the Dry Creek Rancheria Band of Pomo Indians.

Campaign/Project Manager
Independent Contractor
2006-2007

- Crafted and coordinated syphilis prevention social marketing campaign for Navajo Nation Department of Health. Orchestrated media and community outreach strategies for the Alaska Federation of Natives, Alaska Native Arts Foundation, and Council for Native Hawaiian Advancement, including front page special feature in the Washington Post's Sunday Style section for the Alaska Native Arts Foundation.
- Devised national advocacy media campaign against faulty children's bicycles in conjunction with consumer-led litigation in Wal-Mart's defective bikes trial, securing a "Brian Ross Special Report" featured on ABC World News Tonight and Good Morning America. Managed media relations in conjunction with lobby efforts to secure the California Governor's signature on AB826 ("Farm to School").
- Served as campaign manager and strategist for "Dr. John Bernard for Alameda County Superintendent of Schools," which included overseeing a campaign budget of \$200,000, staff, and more than 50 volunteers, as well as for "Derek Knell for Novato Unified School District Board of Education."

Fleishman Hillard
Assistant Account Executive
2004-2005

- Served as global coordinator for agency's largest footprint account, Maxtor, which spanned six continents and 23 countries. Executed outreach strategies and account administration for firm's Corporate practice clients, including Yahoo!, Autodesk, Chevron Energy Solutions, Metropolitan Transportation Commission, Six Flags Marine World, and Japanese Export Trade Organization, as well as coordinated executive communications programs for AT&T, Oracle, and Chevron.
- Designed and developed comprehensive stakeholder communications database for Oracle, as well as managed day to day operations of AT&T's Bay Area reactive media for consumer affairs and Northern California's public affairs programs.

FILED
OFFICE OF THE CITY CLERK
OAKLAND

Approved as to Form and Legality


City Attorney's Office

2020 SEP 24 P 5: 06

OAKLAND CITY COUNCIL

RESOLUTION NO. _____ C.M.S.

INTRODUCED BY MAYOR LIBBY SCHAAF

**RESOLUTION CONFIRMING THE MAYOR'S REAPPOINTMENT
OF VINCENT LEUNG, BRENDA ROBERTS, AND MARCHON
TATMON AND THE APPOINTMENT OF JOSEPH MACALUSO TO
THE BUDGET ADVISORY COMMISSION**

WHEREAS, Section 601 of the City Charter provides that members of City boards and commissions shall be appointed by the Mayor subject to confirmation by the affirmative vote of five members of the City Council; and

WHEREAS, Ordinance No. 13337 C.M.S, adopted November 3, 2015, creates the Budget Advisory Commission to advise the Mayor and City Council on topics deemed important to the fiscal health of the City, encourage public participation and input into fiscal decision making, and improve the transparency and accountability of City fiscal information and decision making; and

WHEREAS, the Budget Advisory Commission shall be composed of 15 members appointed by the Mayor and confirmed by the Council in accordance with Section 601 of the City Charter; and

WHEREAS, three members are selected by the Mayor, two members are recommended by the Chairperson of the Finance and Management Committee, one member is recommended by each Councilmember, one member is recommended by the City Auditor, and one member is recommended by the Chairperson of the Community Economic and Workforce Development Committee; and

WHEREAS, the Honorable Mayor Libby Schaaf, upon the recommendation of the corresponding councilmembers, appoints **Joseph Macaluso** and reappoints **Vincent Leung, Brenda Roberts, and Marchon Tatmon**; now therefore be it

RESOLVED: That pursuant to City Charter section 601, the City Council hereby confirms the Mayor's appointment of:

Joseph Macaluso to serve a three-year term beginning October 1, 2020 and ending September 30, 2023, filling the seat previously held by Geoffrey Johnson; and be it

FURTHER RESOLVED: That pursuant to City Charter section 601, the City Council hereby confirms the Mayor's reappointment of:

Vincent Leung to the Budget Advisory Commission to serve a three-year term beginning October 1, 2020 and ending September 30, 2023, retaining the seat he currently holds;

Brenda Roberts to serve a three- year term beginning October 1, 2020 and ending September 30, 2023, retaining the seat she currently holds; and

Marchon Tatmon to serve a first three-year term beginning October 1, 2020 and ending September 30, 2023, retaining the seat he currently holds.

2982257v1

IN COUNCIL, OAKLAND, CALIFORNIA,

PASSED BY THE FOLLOWING VOTE:

AYES - FORTUNATO BAS, GALLO, GIBSON MCELHANEY, KALB, REID, TAYLOR, THAO
AND PRESIDENT KAPLAN

NOES -

ABSENT -

ABSTENTION -

ATTEST:

ASHA REED
City Clerk and Clerk of the Council
of the City of Oakland, California