

CITY OF OAKLAND



CITY HALL • ONE CITY HALL PLAZA • OAKLAND, CALIFORNIA 94612

Office of the Mayor  
Honorable Sheng Thao

(510) 238-3141  
FAX (510) 238-4731  
TDD (510) 238-3254

Letter of Appointment

June 18, 2024

Dear President Bas and members of the City Council:

Pursuant to City Charter Section 601, the Mayor has appointed the following person as a member of the following board or commission, subject to City Council confirmation:

**Budget Advisory Commission**

**Stephisha Ycoy-Walton**, to serve a three-year term as the District 5 representative on the Budget Advisory Commission that began October 1, 2022 and ending September 30, 2025, filling a vacant seat that was previously held by John McKenna.

Thank you for your assistance in this matter.

Sincerely,

A handwritten signature in black ink that reads "Sheng Thao". The signature is written in a cursive, flowing style.

Mayor Sheng Thao

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## Profile

Stephisha

First Name

Ycoy-Walton

Last Name

Middle  
Initial

Email Address

Street Address

City

Suite or Apt

State

Postal Code

## What City Council district do you live in?

District 7

Primary Phone

Alternate Phone

PFS Investments

Employer

Licensed Financial Advisor

Job Title

## Which Boards would you like to apply for?

Budget Advisory Commission: Submitted

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## Interests & Experiences

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

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Dear Members of the Bicyclist & Pedestrian Advisory Commission, Budget Advisory Commission, Parks and Recreation Advisory Commission & Oakland Youth Commission, I am writing to express my keen interest in serving on one of these commissions (preferably PRAC or BAC) , leveraging my diverse skills and experiences to contribute meaningfully to the well-being and development of our community, regardless of the specific commission I am selected for. As a dedicated Financial Literacy Coach and advocate for community empowerment, I have demonstrated a commitment to fostering positive change and equitable opportunities for all residents. My expertise in financial literacy equips me with the ability to analyze budget proposals, identify areas for improvement, and advocate for responsible fiscal policies that prioritize the needs of our community. Furthermore, my background in relationship building, collaboration, and equity advocacy has prepared me to engage effectively with fellow commissioners, city officials, and community stakeholders, ensuring that all voices are heard and considered in the decision-making process. This is how we were able to have \$28M of Prop 51 funding released to the students of Cox Academy via a 6-0 unanimous OUSD school board vote. Additionally, my passion for serving the community extends to various areas, including parks and recreational programming, youth engagement especially, and active transportation. I firmly believe in the importance of accessible and inclusive recreational opportunities, safe and sustainable transportation options, and meaningful engagement with our youth population. Regardless of the specific commission I am selected for, I am committed to leveraging my skills and experiences to address the diverse needs and interests of our community, advocate for initiatives that reflect our values and aspirations, and work collaboratively with fellow commissioners to enhance the vibrancy and well-being of our city. In conclusion, I am confident that my skills in financial literacy, relationship building, collaboration, and equity advocacy make me a strong candidate for one of the four commissions mentioned above. I am here to serve. Let me serve. I am excited about the opportunity to serve our community and contribute to its continued growth and development. Thank you for considering my application. I look forward to the possibility of serving on a commission for the City of Oakland and making a positive impact in our community. Sincerely, Stephisha Ycoy-Walton

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***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.***

[Service\\_Resume.pdf](#)

Upload a Resume

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

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Stephisha Ycov-Walton Financial Literacy Advocate Stephisha Ycoy-Walton

□ Skills Fina

Coach: provide guidance and education to individuals, families and small businesses, empowering them to develop and improve their financial knowledge, skills and habits. Relationship Building: Building and maintaining caring relationships with all students and families. High Expectations: Maintaining high expectations for all students' literacy progression. Asset-Based Lens: Viewing students through an asset-based lens, focusing on what they can do rather than what they can't. Equity Advocacy: Taking actions that directly lead to creating more equitable conditions in public schools for all students. Collaboration: Working effectively in collaboration with colleagues, families, and students for the benefit of the student. Educational Systems Awareness: Having a close attention to educational systems and policies to work towards racial justice. Leadership: Demonstrating leadership qualities and growth as an educator and leader. □ (CE) Continuing Education & Community Involvement ACOE President Janevette Cole Re-Election Campaign Ground Team Lead 1/2024 - Present, United States Education for Change (EFC) Board of Director 10/2023 - Present, United States Bulletproof Group High School FinLit Workshop Lead Facilitator 2/28/2024, Hype Center, San Francisco, CA United States FIA Lit 4 Literacy (Y2C1) Co-Facilitator (Upcoming) 2/1, 2/15, 2/22, 2/29/2024, United States Bulletproof Group High School FinLit Workshop Lead Facilitator 1/26/2024, Oakstop, Oakland, CA United States FIA

Stephisha Ycoy-Walton

Winter Leadership Institute: Raising the Bar Co-Facilitator 12/4, 12/11, 1/11, 1/18/2024, United States Education Justice Academy (Y2C2) 9/24, 9/29-10/1, 10/8-12/17/2023, United States Cox Prop 51 Lead Organizer (\$28M Facilities Grant Awarded) 02/2023 - 9/7/2023, United States FIA Summer Leadership Institute/5 C's Guest Speaker Guest Speaker 9/6/2023, United States Cox, Prop 51 & OUSD Board: Power is the Ability to Achieve Purpose Case Study Presentation FIA Summer Leadership Institute: Raising the Bar 7/13, 7/20, 7/27, 8/3/2023, United States FIA Lit 4 Literacy: Level Up (Y1C2) 5/2, 5/4, 5/11, 5/25/2023, United States FIA Lit 4 Literacy (Y1C1) 3/7, 3/14, 3/22, 3/29/2023, United States Emerge California (EmergeCA)/ Class Rep 01/2023 - 06/2023, California, USA Public Office Training Program. Selected from an applicant pool of 1,500, I was 1 of 41. EmergeCA 2023 cohort was led by former mayor Libby Schaff. The focus of EmergeCA is to train Democratic women to run for office and win. Education for Change Public Schools/ Family Leadership Council Parent Leader 09/2022 - PRESENT, Oakland, CA Selected by Emely Nuñez, Cox Academy Family Coordinator, and approved by Larissa Adam, EFC Superintendent, my responsibility is to represent Cox Academy as a Parent Leader as we assess the current state of our educational opportunities, discuss barriers and solutions with professional educators, fellow parents and community leaders then develop a strategic action plan to help increase educational equity for all students, including EFC students. Families-In-Action (FIA)/ Literacy Leadership Institute Parent Leader 10/ 2022 -PRESENT, Alameda County, CA Selected by Emely Nuñez, Cox Academy Family Coordinator, and approved by FIA CEO Kimi Kean. The focus of the Literacy Leadership Institute is to partner parents with Academic Professionals across OUSD and other districts to support the child(ren) in achieving literacy outcomes using a science-based approach to instruction. Black Family Council (BFC)/ Co-Chair 11/2022 -PRESENT, Oakland, CA The BFC at Cox Academy had been dormant for the last 4 years. Now, revitalized, our mission and focus is to increase literacy scores, parent involvement, student attendance and leadership development for minority students at Cox Academy before they transition back into OUSD middle school (i.e. Elmhurst). □ Education California Polytechnic University of Pomona/ B. S. Kinesiology (Focus: Pre-Medical Exercise Science) June 2007 - June 2012, Pomona, CA Vallejo High School / Diploma August 2004 - June 2005, Vallejo, CA St. Patrick-St. Vincent High School / Transferred August 2001 - June 2004, Vallejo, CA Vallejo Middle School / Matriculated August 1998 - June 2001, Vallejo, CA Mare Island Elementary / Matriculated August 1996 - June 1998, Vallejo, CA Farragut Elementary/ Transferred August 1993 - June 1996, Vallejo, CA □ Professional Licenses NMLS/ Mortgage Loan Origination (MLO) - SAFE MLO Test July 2022 - Present Licensed Mortgage Loan Broker. Responsible for guiding borrowers through the mortgage process, evaluating eligibility, providing advice and ensuring compliance. NASAA/ Series 65 -Uniform Investment Advisor Law Examination July 2022 - Present Licensed Investment Advisor. Oversee financial planning & investment advice along with investment strategies, portfolio management, legal and regulatory guidelines, ethics and the economic environment. FINRA/ Series 26 -Investment Company Products/Variable Products Principal Examination September 2021 - Present Licensed Investment Principal. Act as a principal and supervise activities related to investment decisions within the brokerage firm or financial institution. FINRA/ Series 63 -Uniform Securities Agent State Law Examination April 2014 - Present FINRA/ Series 6 -Investment Company Products/Variable Products Examination April 2014 - Present □ Service Awards Education for Change/ Certificate of Excellence in Appreciation of Leadership & Service August 2023 Cox Academy/ Certificate of Appreciation Award for Dedication & Commitment to Cox Academy Students April 2023 Education for Change + Families In Action/ Family Literacy Leadership Institute Award March 2023 EmergeCA/ Elected Class Representative January 2023

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**Please click the acknowledgement below.**

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

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I Agree \*

Stephisha Ycoy-Walton

# Stephisha Ycoy-Walton

## Financial Literacy Advocate

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### Skills

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### Stephisha Ycoy-Walton

[REDACTED]  
[REDACTED]

[REDACTED]  
[REDACTED]

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**Financial Literacy Coach:** provide guidance and education to individuals, families and small businesses, empowering them to develop and improve their financial knowledge, skills and habits.

**Relationship Building:** Building and maintaining caring relationships with all students and families.

**High Expectations:** Maintaining high expectations for all students' literacy progression.

**Asset-Based Lens:** Viewing students through an asset-based lens, focusing on what they can do rather than what they can't.

**Equity Advocacy:** Taking actions that directly lead to creating more equitable conditions in public schools for all students.

**Collaboration:** Working effectively in collaboration with colleagues, families, and students for the benefit of the student.

**Educational Systems Awareness:** Having a close attention to educational systems and policies to work towards racial justice.

**Leadership:** Demonstrating leadership qualities and growth as an educator and leader.

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### (CE) Continuing Education & Community Involvement

**ACOE President Janevette Cole Re-Election Campaign Ground Team Lead**

1/2024 - Present, United States

**Education for Change (EFC) Board of Director**

10/2023 - Present, United States

**Bulletproof Group High School FinLit Workshop Lead Facilitator**

2/28/2024, Hype Center, San Francisco, CA United States

**FIA Lit 4 Literacy (Y2C1) Co-Facilitator (Upcoming)**

2/1, 2/15, 2/22, 2/29/2024, United States

**Bulletproof Group High School FinLit Workshop Lead Facilitator**

1/26/2024, Oakstop, Oakland, CA United States

**FIA Winter Leadership Institute: Raising the Bar Co-Facilitator**

12/4, 12/11, 1/11, 1/18/2024, United States

**Education Justice Academy (Y2C2)**

9/24, 9/29-10/1, 10/8-12/17/2023, United States

**Cox Prop 51 Lead Organizer (\$28M Facilities Grant Awarded)**

02/2023 - 9/7/2023, United States

**FIA Summer Leadership Institute/5 C's Guest Speaker *Guest Speaker***

9/6/2023, United States

Cox, Prop 51 & OUSD Board: Power is the Ability to Achieve Purpose Case Study Presentation

**FIA Summer Leadership Institute: Raising the Bar**

7/13, 7/20, 7/27, 8/3/2023, United States

**FIA Lit 4 Literacy: Level Up (Y1C2)**

5/2, 5/4, 5/11, 5/25/2023, United States

**FIA Lit 4 Literacy (Y1C1)**

3/7, 3/14, 3/22, 3/29/2023, United States

**Emerge California (EmergeCA)/ Class Rep**

01/2023 - 06/2023, California, USA

Public Office Training Program. Selected from an applicant pool of 1,500, I was 1 of 41. EmergeCA 2023 cohort was led by former mayor Libby Schaff. The focus of EmergeCA is to train Democratic women to run for office and win.

**Education for Change Public Schools/ Family Leadership Council Parent Leader**

09/2022 - PRESENT, Oakland, CA

Selected by Emely Nuñez, Cox Academy Family Coordinator, and approved by Larissa Adam, EFC Superintendent, my responsibility is to represent Cox Academy as a Parent Leader as we assess the current state of our educational opportunities, discuss barriers and solutions with professional educators, fellow parents and community leaders then develop a strategic action plan to help increase educational equity for all students, including EFC students.

**Families-In-Action (FIA)/ Literacy Leadership Institute Parent Leader**

10/ 2022 -PRESENT, Alameda County, CA

Selected by Emely Nuñez, Cox Academy Family Coordinator, and approved by FIA CEO Kimi Kean. The focus of the Literacy Leadership Institute is to partner parents with Academic Professionals across OUSD and other districts to support the child(ren) in achieving literacy outcomes using a science-based approach to instruction.

**Black Family Council (BFC)/ Co-Chair**

11/2022 -PRESENT, Oakland, CA

The BFC at Cox Academy had been dormant for the last 4 years. Now, revitalized, our mission and focus is to increase literacy scores, parent involvement, student attendance and leadership development for minority students at Cox Academy before they transition back into OUSD middle

school (i.e. Elmhurst).

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## Education

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**California Polytechnic University of Pomona/ B. S. Kinesiology (Focus: Pre-Medical Exercise Science)**  
June 2007 - June 2012, Pomona, CA

**Vallejo High School / Diploma**  
August 2004 - June 2005, Vallejo, CA

**St. Patrick-St. Vincent High School / Transferred**  
August 2001 - June 2004, Vallejo, CA

**Vallejo Middle School / Matriculated**  
August 1998 - June 2001, Vallejo, CA

**Mare Island Elementary / Matriculated**  
August 1996 - June 1998, Vallejo, CA

**Farragut Elementary/ Transferred**  
August 1993 - June 1996, Vallejo, CA

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## Professional Licenses

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**NMLS/ Mortgage Loan Origination (MLO) - SAFE MLO Test**

July 2022 - Present

Licensed Mortgage Loan Broker. Responsible for guiding borrowers through the mortgage process, evaluating eligibility, providing advice and ensuring compliance.

**NASAA/ Series 65 -Uniform Investment Advisor Law Examination**

July 2022 - Present

Licensed Investment Advisor. Oversee financial planning & investment advice along with investment strategies, portfolio management, legal and regulatory guidelines, ethics and the economic environment.

**FINRA/ Series 26 -Investment Company Products/Variable Products Principal Examination**

September 2021 - Present

Licensed Investment Principal. Act as a principal and supervise activities related to investment decisions within the brokerage firm or financial institution.

**FINRA/ Series 63 -Uniform Securities Agent State Law Examination**

April 2014 - Present

**FINRA/ Series 6 -Investment Company Products/Variable Products Examination**

April 2014 - Present

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## Service Awards

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**Education for Change/ Certificate of Excellence in Appreciation of Leadership & Service**

August 2023

**Cox Academy/ Certificate of Appreciation Award for Dedication & Commitment to Cox Academy Students**

April 2023

**Education for Change + Families In Action/ Family Literacy Leadership  
Institute Award**  
March 2023

**EmergeCA/ Elected Class Representative**  
January 2023



APPROVED AS TO FORM AND LEGALITY



CITY ATTORNEY'S OFFICE

## OAKLAND CITY COUNCIL

RESOLUTION NO. \_\_\_\_\_ C.M.S.

INTRODUCED BY MAYOR SHENG THAO

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### RESOLUTION CONFIRMING THE MAYOR'S APPOINTMENT OF STEPHISHA YCOY-WALTON 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**, District 5 Councilmember Noel Gallo has recommended the appointment of Stephisha Ycoy-Walton to the Budget Advisory Commission; now, therefore, be it

**RESOLVED**, that the City Council hereby confirms the Mayor’s appointment of the following individual to the Budget Advisory Commission as set forth below:

**Stephisha Ycoy-Walton**, to serve a three-year term as the District 5 representative on the Budget Advisory Commission that began October 1, 2022 and ending September 30, 2025, filling a vacant seat that was previously held by John McKenna.

IN COUNCIL, OAKLAND, CALIFORNIA,

PASSED BY THE FOLLOWING VOTE:

AYES - FIFE, GALLO, JENKINS, KALB, KAPLAN, RAMACHANDRAN, REID, AND  
PRESIDENT FORTUNATO BAS

NOES –

ABSENT –

ABSTENTION –

ATTEST: \_\_\_\_\_

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