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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

April 23, 2019

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

Travis George to serve a three year term beginning October 3, 2018 and ending October 2, 2021.

Sarah Lee to serve a three year term beginning October 3, 2018 and ending October 2, 2019.

Thank you for your assistance in this matter.

Sincerely,

A handwritten signature in black ink, appearing to read "Libby Schaaf".

Libby Schaaf
Mayor

ProfileSarah

First Name

K

Middle Initial

Lee

Last Name

Email Address

Street Address

Suite or Apt

City

CA

State

94606

Postal Code

Home:

Primary Phone

Business: (

Alternate Phone

Employer

Director of Strategy

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 graduate of Mills College (Class of 2001) and a homeowner in Oakland (San Antonio Park Neighborhood), I am passionate about getting more deeply involved in my community-- Oakland. As an educator and entrepreneur, I aspire to apply my professional expertise and experiences to this endeavor. Currently, I am an advisor to education companies and edtech leaders around the world in addition to my role as Director of Strategy at Higher Ground Education, a company that owns and operates Montessori Schools around the United States and internationally. In my consulting work, I advise founding teams as they face some of the most critical human capital, operational growth, and fundraising milestones in their early stages. I bring 16+ years of experience launching and leading education enterprises to each conversation and every project. My expertise is in international operations, expansion/scale, and career and admissions advising is built on a strong record of helping companies exceed targets, establishing strategic relationships, and maximizing individual and team potential. I have a strong reputation among clients, peers and industry leaders for strategic thinking, creative solutions, relentless focus on results, and dedication to positive educational impact. Consulting + Boards: Education companies based in China, Hong Kong, Singapore, and Silicon Valley; Carian College Advisors (Dubai, UAE), Wedu - Investing in Women Leaders (Bangkok, TH) <http://www.wedufund.org/>, WoW Education (Beijing & Cambodia). Previous: Founding Associate Publisher, Hyphen Magazine; Board Member, Young Women Social Entrepreneurs, YWSE (San Francisco). SPECIALTIES: Education Management, Career & Leadership Coaching, Executive Coaching, Staff Development and Training, Higher Education Admissions / College Counseling, International Education, Social Entrepreneurship in Education, Education in the Developing Context, Economics of Education.

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.

Sarah K Lee CV 2017.doc

Upload a Resume

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

SARAH K. LEE

INTERNATIONAL EDUCATION ENTERPRISE Highly driven, performance focused education entrepreneur with 15+ years experience in the education enterprise sector with expertise in early-stage (pre-Series A) education business around the world as they launch and scale. Work closely with founding teams as they face the most critical human capital, operational growth, and fundraising milestones.

Expertise in international operations, expansion/scale, and coaching diverse teams built on a strong track record of helping companies exceed financial targets, establish strategic relationships, and maximize individual and team potential. Strong reputation among clients, peers and industry leaders for strategic thinking, creative solutions, relentless focus on results, and dedication to positive educational impact.

AREAS OF EXPERTISE EdTech and Education Enterprise Launch/Scale • Educator Training & Professional Development • Client Services Counseling/Coaching PROFESSIONAL EXPERIENCE

STANFORD GRADUATE SCHOOL OF BUSINESS, Stanford, CA Assistant Director, Career Management Center, Jul 2013-Jul 2015 " Established innovative programs and 1:1 advising for MBA and MA of Management degree students and alumni, supporting ambitious efforts to pursue fulfilling careers. " Facilitated interpersonal dynamics small groups, including career and life vision for MBA1/2 cohorts.

HARVARD LAW SCHOOL, Cambridge, MA (during graduate studies) J.D. Admissions, Admissions Recruiting Committee, Sep 2012-Jun 2013 " Researched and authored first HLS International Applicant Review Guide, used by the HLS faculty and admissions staff for international J.D. applicants from Canada, Russia, Israel, China, and South Korea to date. " Served on HLS J.D. Admissions Committee for Class of 2016. DIPONT EDUCATION MANAGEMENT, Shanghai, China Senior Director, College Admissions Counseling Program Development, April 2009-July 2012 " Designed college preparation programs in Shanghai, Hangzhou, Nanjing, and Shenzhen while managing Advanced College Counseling Program. " Implemented 27 international high schools imbedded within top public K-12 schools in 14 Chinese cities. " Created and implemented 2-week summer camp while leading college counselor training for Chinese staff. " Facilitated orientation/induction workshops for over 350 new expatriate staff members.

" Supervised 2 managers and 6 counselors, directed training for 65+ Chinese counselors in 14 cities, and managed Dipont Fellows. LEADERSHIP ACADEMY, Shanghai, China Director of Education, Co-Founder, May 2006-June 2010 " Grew new client base by 300% by leading marketing and sales strategy. "

Designed comprehensive university admissions and English language study programs for junior and senior high schools while managing foreign and local teacher recruitment and development. " Created experiential learning and social entrepreneurship programs in China and New York City, with college and culture tours featured in The New Yorker Magazine, Talk of the Town in August 30, 2010 issue. "

Managed philanthropic operations for corporate foundation, dispersing USD\$500K. " Sold business in 2010 to a Taiwanese Real Estate Company. GREATSCHOOLS, ORG, San Francisco, CA Manager, Business Operations, Jul 2004-Jul 2005 " Created operations infrastructure for \$1.2M in online advertising revenue, leading to philanthropic investments by Gates Foundation of \$10M. SARAH K. LEE, PAGE 2

KIPP FOUNDATION, San Francisco, CA Analyst, Operational Leadership Team, Jul 2003-Jul 2004 " Led cross-functional team for 8 KIPP (Knowledge is Power Program) charter middle schools, new school start-up team for KIPP Heartwood Academy, and KIPP Fresno Academy. " Designed first financial sustainability analysis for all schools while leading 'Real Cost of KIPP Results' by BCG. RESEARCH & FELLOWSHIP EXPERIENCE " MIT School Effectiveness & Inequality Initiative (SEII), Boston, MA, Research Analyst, Nov 2012-May 2013 Provide research and data collection for various Boston public charter schools. " J. William Fulbright Teaching Fellowship, Yi-lan County, Taiwan, Teaching Fellow, Jul 2005-Aug 2006 Created the Fulbright Taiwan Audio Library; developed project-based curriculum with Taiwanese teachers; taught ESL for grades 1-5 in large suburban and rural aboriginal schools.

VOLUNTEER WORK " Harvard-Stanford Education Enterprise Forum, [Community Manager], 2012-Present Curate online community focused on events, news and opportunities in education entrepreneurship. " YWSE (Young Women Social Entrepreneurs), Director Emeritus, 2004-2010 " Hyphen Magazine (Asian American Politics & Culture Magazine), Founding Board Member/Founding Associate Publisher/Director of Marketing, 2003-2005 EDUCATION " Harvard Graduate School of Education, Ed.M., International Education Policy and Higher Education, 2013 " Mills College, B.A., Political, Legal & Economic Analysis, 2000 " Yunnan Normal University, Mandarin Chinese Language, 2000

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 *

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Educator Training & Professional Development ● Client Services Counseling/Coaching

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EDUCATION

- **Harvard Graduate School of Education**, Ed.M., International Education Policy and Higher Education, 2013
- **Mills College**, B.A., Political, Legal & Economic Analysis, 2000
- **Yunnan Normal University**, Mandarin Chinese Language, 2000

Profile

Travis George
First Name Middle Initial Last Name

Email Address

Street Address Suite or Apt

Oakland CA 94602
City State Postal Code

Mobile: Business:
Primary Phone Alternate Phone

Employer Debt Manager
Job Title

Which Boards would you like to apply for?

- Bicyclist & Pedestrian Advisory Commission: Submitted
- Budget Advisory Commission: Submitted
- City Planning Commission: Submitted
- Affordable Housing & Infrastructure Bond Public Oversight Committee : Submitted

Interests & Experiences

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

I look forward to the opportunity to join one or two of the commissions for which I expressed interest. My extensive background in the public sector has familiarized me with the many challenges that local governments face. My time in the private sector, evaluating local governments while with Moody's (one of the three large credit rating agencies) prepared me to be able to add a valuable perspective to any of these commissions. I understand how government works, what a strong public organization looks like, and many of the steps cities can take to continue to improve their performance for their citizens and taxpayers.

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.

Upload a Resume

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

EXPERIENCE East Bay Municipal Utility District, Oakland, CA Sep 2016 to Present Debt Manager • Manage the district's debt portfolio consisting of approximately \$3 billion in fixed and variable rate revenue bonds and other debt instruments, including swaps and commercial paper • Design and execute financings to optimize debt portfolio structure and provide capital • Ensure ongoing compliance with regulatory requirements • Manage relationships and contracts with financial advisors, legal counsel, bankers, and other stakeholders San Francisco Public Utilities Commission, San Francisco, CA Jan 2017 to Present Revenue Bond Oversight Committee Member • Provide public oversight of the spending of bond proceeds on infrastructure projects • Evaluate SFPUC capital planning, debt management, and capital project processes Moody's Investors Service, San Francisco, CA Aug 2011 to Aug 2016 Credit Analyst, Public Finance • Conducted detailed research on and analysis of debt and financial data, management, capital investment strategies, regulatory environments, and local economies of a wide range of public sector entities • Made credit rating recommendations and led committees convened to determine credit rating actions • Wrote and published detailed municipal credit reports explaining rationales for rating actions taken by Moody's • Led meetings with municipal managers to discuss various credit-related issues and convey rating decisions • Managed projects related to data analysis and economic research • Spoke at conferences and presented to national audience at teleconferences Con Edison Company of New York, New York, NY Jul 2010 to Aug 2011 Rate Analyst, Rate Engineering • Performed analysis of company's energy supply, transmission and distribution rates • Created experimental rate designs and tested the potential impacts on customers • Developed financial models used for analysis of rates and revenues • Forecasted future rates and revenues for inputs into company annual budget • Analyzed customer issues and provided expert guidance United Nations Development Program (UNDP), New York, NY and Egypt Oct 2009 to May 2010 Consultant, NYU Advanced Project in International Development • Researched Egypt's national and local administrative, economic, financial, and political systems • Produced client report outlining current governance systems and potential for policy improvements • Analyzed government policies related to public investment, political processes, and policy formation • Conducted field work alongside Egyptian officials in Cairo, Egypt and 4 local Egyptian governorates Bonneville Power Administration (U.S. Department of Energy), Portland, OR Jul 2005 to Jul 2008 Financial Analyst, Debt and Investments • Implemented infrastructure project finance program of approximately \$500 million • Determined schedule and managed process for periodic infrastructure project financings • Coordinated with bankers for securing and drawing down of large (\$100m +) credit facilities • Analyzed market data (interest rate spreads) to compare program costs with alternative financing options • Coordinated with internal and external legal counsel to develop and adhere to complex legal requirements EDUCATION New York University, Wagner School of Public Service, New York, NY Master of Public Administration, May 2010 Concentration: International Public Policy Portland State University, Portland, OR Bachelor of Arts in Economics, August 2005

Please click the acknowledgement below.

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I Agree *

FILED
OFFICE OF THE CITY CLERK
OAKLAND

19 APR 25 AM 11:56

Approved as to Form and Legality

DRAFT

City Attorney's Office

OAKLAND CITY COUNCIL

RESOLUTION NO. _____ C.M.S.

INTRODUCED BY MAYOR LIBBY SCHAAF

RESOLUTION CONFIRMING THE MAYOR'S APPOINTMENT OF TRAVIS GEORGE AND SARAH LEE TO THE BUDGET ADVISORY COMMISSION

WHEREAS, Section 601 of the Charter of the City of Oakland 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 **Travis George** and **Sarah Lee**; now therefore be it

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

Travis George to serve a three year term beginning October 3, 2018 and ending October 2, 2021 filling a seat previously held by Marguerite Fuller.

Sarah Lee to serve a three year term beginning October 3, 2018 and ending October 2, 2019.

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: _____

LATONDA SIMMONS
City Clerk and Clerk of the Council
of the City of Oakland, California