



Agenda

INTERNAL OPERATIONS COMMITTEE

May 8, 2017
1:00 P.M.

651 Pine Street, Room 101, Martinez

Supervisor Candace Andersen, Chair
Supervisor Diane Burgis, Vice Chair

Agenda Items:

Items may be taken out of order based on the business of the day and preference of the Committee

1. Introductions
2. Public comment on any item under the jurisdiction of the Committee and not on this agenda (speakers may be limited to three minutes).
3. RECEIVE and APPROVE the Record of Action for the April 10, 2017 IOC meeting. *(Julie DiMaggio Enea, IOC Staff)*
4. INTERVIEW candidates for the pending vacant seats on the Retirement Board and determine recommendations for Board of Supervisors consideration on June 6. *(Julie DiMaggio Enea, County Administrator's Office)*
5. INTERVIEW candidates for the pending vacant seat on the East Bay Regional Parks District Park Advisory Committee and determine recommendation for Board of Supervisors consideration on May 23. *(Julie DiMaggio Enea, County Administrator's Office)*
6. The next meeting is currently scheduled for June 12, 2017.
7. Adjourn

The Internal Operations Committee will provide reasonable accommodations for persons with disabilities planning to attend Internal Operations Committee meetings. Contact the staff person listed below at least 72 hours before the meeting.

Any disclosable public records related to an open session item on a regular meeting agenda and distributed by the County to a majority of members of the Internal Operations Committee less than 96 hours prior to that meeting are available for public inspection at 651 Pine Street, 10th floor, during normal business hours. Staff reports related to items on the agenda are also accessible on line at www.co.contra-costa.ca.us.

Public comment may be submitted via electronic mail on agenda items at least one full work day

prior to the published meeting time.

For Additional Information Contact:

Julie DiMaggio Enea, Committee Staff
Phone (925) 335-1077, Fax (925) 646-1353
julie.enea@cao.cccounty.us



Contra Costa County Board of Supervisors

Subcommittee Report

INTERNAL OPERATIONS COMMITTEE

3.

Meeting Date: 05/08/2017

Subject: RECORD OF ACTION FOR THE APRIL 10, 2017 IOC MEETING

Submitted For: David Twa, County Administrator

Department: County Administrator

Referral No.: N/A

Referral Name: RECORD OF ACTION

Presenter: Julie DiMaggio Enea, IOC
Staff

Contact: Julie DiMaggio Enea (925)
335-1077

Referral History:

County Ordinance requires that each County body keep a record of its meetings. Though the record need not be verbatim, it must accurately reflect the agenda and the decisions made in the meeting.

Referral Update:

Attached is the Record of Action for the April 10, 2017 IOC meeting.

Recommendation(s)/Next Step(s):

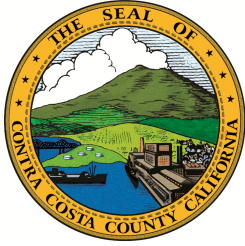
RECEIVE and APPROVE the Record of Action for the April 10, 2017 IOC meeting.

Fiscal Impact (if any):

None.

Attachments

DRAFT Record of Action for 4-10-2017 IOC Meeting



INTERNAL OPERATIONS COMMITTEE

RECORD OF ACTION FOR
April 10, 2017

Supervisor Candace Andersen, Chair
Supervisor Diane Burgis, Vice Chair

Present: Candace Andersen, Chair
Diane Burgis, Vice Chair

Staff Present: Julie DiMaggio Enea, Staff

Attendees: Allison Picard, Chief Asst CAO
Maureen Parkes, DCD
Jami Napier, Sr Deputy CAO, Clerk of the
Board

1. Introductions

Chair Andersen convened the meeting at 1:00 p.m.

2. Public comment on any item under the jurisdiction of the Committee and not on this agenda (speakers may be limited to three minutes).

No members of the public asked to speak during the Public Comment period.

AYE: Chair Candace Andersen, Vice Chair Diane Burgis
Passed

3. RECEIVE and APPROVE the Record of Action for the March 13, 2017 IOC meeting.

The Committee approved the Record of Action for the March 13, 2017 IOC meeting as presented.

AYE: Chair Candace Andersen, Vice Chair Diane Burgis
Passed

4. ACCEPT the SBE and Outreach Programs Report, reflecting departmental program data for the period July 1 through December 31, 2016.

The Committee accepted the report as presented and directed staff to forward the report to the Board of Supervisors.

AYE: Chair Candace Andersen, Vice Chair Diane Burgis

Passed

5. APPROVE recommendations from the Fish & Wildlife Committee for the allocation of 2017 Fish and Wildlife Propagation Fund grant funds for 16 projects totaling \$102,185.

DRAFT

The Committee approved the recommended allocations and directed staff to forward the recommendations to the Board of Supervisors.

AYE: Chair Candace Andersen, Vice Chair Diane Burgis
Passed

6. CONSIDER recommendation of the Animal Services Director to update the current Dog Barking Ordinance to authorize administrative penalties for animal noise violations, and DETERMINE action to be taken.

The Committee directed staff to work with County Counsel to bifurcate the proposed ASD ordinance to permit the barking dog portion of the ordinance to advance to the Board of Supervisors.

AYE: Chair Candace Andersen, Vice Chair Diane Burgis
Passed

7. The next meeting is currently scheduled for May 8, 2017.
8. Adjourn

Chair Andersen adjourned the meeting at 1:16 p.m.

For Additional Information Contact:

DRAFT

Julie DiMaggio Enea, Committee Staff
Phone (925) 335-1077, Fax (925) 646-1353
julie.enea@cao.cccounty.us



Contra Costa County Board of Supervisors

Subcommittee Report

INTERNAL OPERATIONS COMMITTEE

4.

Meeting Date: 05/08/2017

Subject: INTERVIEW CANDIDATES FOR THREE VACANCIES ON THE RETIREMENT BOARD OF TRUSTEES

Submitted For: David Twa, County Administrator

Department: County Administrator

Referral No.: 17/5

Referral Name: ADVISORY BODY RECRUITMENT

Presenter: Julie DiMaggio Enea, IOC
Staff

Contact: Julie DiMaggio Enea
925.335.1077

Referral History:

On December 12, 2000, the Board of Supervisors approved a policy on the process for recruiting applicants for selected advisory bodies of the Board. This policy requires an open recruitment for all vacancies to At Large seats appointed by the Board. The Board also directed that the IOC personally conduct interviews of applicants for At Large seats on several boards, committees, and commissions including the County Retirement Board.

Referral Update:

The Contra Costa County Employees' Retirement Association (CCCERA) is administered by the Board of Retirement, an independent public entity responsible for general management of the association. With assistance from qualified professionals in the pension industry, the Board adopts regulations, policies and procedures that are relevant to CCCERA, for the purpose of benefiting the members. CCCERA is also governed by the California Constitution and the regulations, procedures and policies adopted by CCCERA's Board. The Contra Costa County Board of Supervisors may also adopt resolutions which affect member benefits, as permitted by the County Employees' Retirement Law of 1937.

On June 30, 2017, the terms for seats #5, #9, and the Alternate for seats 4, 5, 6, and 9 on the County Retirement Board, will expire, creating three vacancies. (The term for seat #6 will also expire on June 30, 2017 but the Board of Supervisors already re-appointed Supervisor Candace Andersen to seat.) At the direction of the Internal Operations Committee, staff initiated a six-week recruitment by issuing a press release (**attached**) on March 3rd advertising the vacancies with an application deadline of April 7th.

For advisory body vacancies, our standard advertising includes:

- Posting a notice in the News Flash section of the homepage for the duration of the nomination period.

- Promoting with a recruitment announcement on CCTV's CountyNet bulletin board
- Emailing to area print/online publications, plus KCBS Radio and KKDV Radio.

The recruitment garnered ten applications; however, one applicant was ineligible, leaving nine candidates for the Committee's consideration. The term of office for the vacant Board of Supervisors appointees seats is July 1, 2017 - June 30, 2020.

Recommendation(s)/Next Step(s):

INTERVIEW candidates for the pending vacant seats on the Retirement Board and determine recommendations for Board of Supervisors consideration on June 6.

Group 1 @ 1:00 p.m.:

- Debora Allen, (Incumbent, Appointee #5 seat), Clayton
- James Agrusa, Alamo
- Mark Cordone, Alamo

Group 2 @ 1:20 p.m.:

- Frank Darling, Orinda
- Jerry Holcombe (Incumbent, Alternate to Members 4, 5, 6, & 9 seat), Walnut Creek
- Jay Kwon, Danville

Group 3 @ 1:40 p.m.:

- John Phillips (Incumbent, Appointee #9 seat), Moraga
- Dennis Reigle, Alamo
- Kurt Schneider*, Richmond

**Note that Kurt Schneider is a former employee and current non-vested member of CCCERA. Mr. Schneider understands that he would be required to, and he has agreed to, withdraw his contributions and forfeit all rights of membership in CCCERA (Gov. Code Section 31629.5) as a condition of appointment to the Retirement Board.*

Fiscal Impact (if any):

None to the County. Retirement Board Trustees receive a stipend of \$100 per meeting, plus mileage reimbursement, paid by CCCERA.

Attachments

Press Publication County Retirement Board

CCCERA Candidate Matrix

Candidate Application James Agrusa CCCERA

Candidate Application Debora Allen CCCERA

Candidate Application Mark Cordone CCCERA

Candidate Application Frank Darling CCCERA

Candidate Application Jerry Holcombe CCCERA

Candidate Application Jay Kwon CCCERA

Resume Jay Kwon CCCERA

Candidate Application John Phillips CCCERA

Resume John Phillips CCCERA

Candidate Application Dennis Reigle CCCERA

Candidate Application Kurt Schneider CCCERA



Contra Costa County

County Administrator's Office • 651 Pine Street • Martinez, CA 94553 • www.co.contra-costa.ca.us

Media Release

FOR IMMEDIATE RELEASE

Friday, March 3, 2017

Contact: Julie DiMaggio Enea

Phone: (925) 335-1077

Email: julie.enea@cao.cccounty.us

WOULD YOU LIKE TO SERVE ON THE RETIREMENT BOARD?

The Contra Costa County Board of Supervisors is seeking individuals with a sound business background, experience in pension fund investment or administration, or in equity investments or banking, to serve on the Contra Costa County Employees' Retirement Association Board of Trustees. To be considered, candidates must be County residents, must not be Retirement System members or retirees, and may not market any investment, consulting, or related service to the Contra Costa County Retirement Board or any other 1937 Act Retirement Board.

Regular meetings of the Retirement Board are held the second and fourth Wednesdays of each month beginning at 9:00 a.m. and sometimes extending into the afternoon. There may also be additional meetings on special topics that arise from time to time. Members of the Retirement Board receive \$100 per meeting up to a monthly maximum of \$500, plus reimbursement for actual and necessary expenses. The County is seeking to fill two regular seats and one alternate seat. The appointments will be for full three-year terms beginning July 1, 2017 and ending June 30, 2020.

Application forms can be obtained from the Clerk of the Board of Supervisors by calling (925) 335-1900 or by visiting the County website at www.co.contra-costa.ca.us. Applications should be returned to the Clerk of the Board of Supervisors, Room 106, County Administration Building, 651 Pine Street, Martinez, CA 94553, **no later than 5:00 p.m. on Friday, April 7, 2017**. Applicants should plan to be available for public interviews on Monday, May 8, 2017. Further information about the Retirement Board can be obtained by calling CCCERA CEO Gail Strohl at (925) 521-3960 or by visiting the website www.cccera.org.

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NAME	DISTRICT	CITY	EDUCATION	CURRENT EMPLOYER	CURRENT TITLE/POSITION	VOLUNTEER ACTIVITY	EXPERIENCE	FIDUCIARY EXPERTISE
Agrusa, James	II	Alamo	BA with graduate training: -BA in Biology, Clark Univ -Certified Fund Specialist designation in Investments, Inst. Of Bus & Finance -Chartered Retirement Planning	Since 2001, Ameriprise Financial, Walnut Creek	Financial Advisor	None listed.	Consulting with individuals, businesses and organizations about money management and investing.	None listed.
Allen, Debora A.	IV	Clayton	BS with graduate training: -BS in Business/Accounting from Cal State Univ Sacramento -24 semester units in Taxation from Golden Gate Univ -inactive CPA license -Wharton Bus School certificate	W.E. Lyons Construction, Walnut Creek Since 2016, elected member of BART Board	Chief Financial Officer/ Shareholder	CCCERA board member since 2012, served on multiple non-profit boards	Management/administration of finance, accounting, HR, IT, risk management, operational workflow, and marketing; CPA consulting	CCCERA board member since 2012
Cordone, Mark	II	Alamo	High School Diploma Financial Industry Regulatory Authority Series 7 and Series 6 licenses (to sell securities)	Since 2012, Journeyman Capital Mgmt, San Francisco	President and Co-founder	None listed.	Investment advisor, including 401K, sales and service of institutional retirement plans; pension fund administration	Journeyman managed assets
Darling, Frank	II	Orinda	BS & MBA: -BS Bus Admin from Cal State Univ Sacramento -MBA in Business from Pepperdine Univ -Certification in Mgmt/Leadership from Univ of Washington -CA Investment Series 6 & 63 license	Retired from Georgia Pacific, Atlanta GA, 31 years	VP, GM, Printing/Publishing	CCC Grand Jury, Boy Scouts, Orinda Parks & Rec, Orinda Rotary Club, Acaianes School District, etc.	Led \$ 1B business with 8 paper mills; labor negotiations and business admin.	Rotary Club of Orinda, led board which managed endowment fund
Holcombe, Jerry	?	Walnut Creek	BS in Biological Sciences from Cal Poly, San Luis Obispo	Retired from Delta Dental Plan of CA, SF	Senior Vice President, Gen Services	CCCERA Board Alternate since 2008	Administrative oversight ov HR, corporate communications, PR, advertising, claims, processing, IT and legal	CCCERA board alternate since 2008; chair of corporate 401K committee
Kwon, Jay	II	Danville	BA, MA & MBA: -BA in Economics from Stanford Univ -MA in Economics from Cal State Hayward -MBA in Business from Univ of Oxford -Chartered Financial Analyst and Chartered Alternative Investment Analyst designations	Since 2014, City of San Jose, Office of Retirement Services	Investment Officer	None listed.	External investment management, investment portfolio management, trading	Investment officer for City of San Jose Office of Retirement
Phillips, John	II	Moraga	BS, MBAs: -BS, University of California, Berkeley -1966 MBA, University of California, Berkeley -1972 MBA (taxation), Golden Gate University CPA/CA Enrolled Actuary	Since 2007, John B. Phillips, CPA	Owner/Investor/Consultant	None listed.	Employee benefits admin, pension actuary and consultant, American Academy of Actuaries, investment portfolio management	CCCERA board member since 2011; investment portfolio management at Cal CPA Health
Reigle, Dennis	II	Alamo	BA/MBA: -BA in Psychology from Univ of Cincinnati -MBA in Business from Harvard Univ	Retired in 2001 from Arthur Andersen LLP	Managing Partner, Partner Matters and HR, North America	Many philanthropic organizations in the area of education	Managing Partner at Arthur Andersen, investment committee, trustee on fellowship foundation, non-profit education sector	Chaired investment committee for pension and profit sharing plans at Arthur Anderson
Schneider, Kurt	I	Richmond	BA, MA: -BA in Mathematics from UC Berkeley -MA in Mathematics from UC San Diego -3 Professional certifications as an actuary	Since 2016, CalPERS	Senior Pension Actuary		Professional pension actuary, former deputy chief executive officer for CCCERA	Former deputy chief executive officer for CCCERA



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For Reviewers Use Only:

Accepted Rejected

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

MAIL OR DELIVER TO:

Contra Costa County
CLERK OF THE BOARD
651 Pine Street, Rm. 106
Martinez, California 94553-1292

PLEASE TYPE OR PRINT IN INK

(Each Position Requires a Separate Application)

BOARD, COMMITTEE OR COMMISSION NAME AND SEAT TITLE YOU ARE APPLYING FOR:

Employees' Retirement Assoc. Board of Trustees

PRINT EXACT NAME OF BOARD, COMMITTEE, OR COMMISSION

PRINT EXACT SEAT NAME (if applicable)

1. **Name:** Agrusa James
 (Last Name) (First Name) (Middle Name)

2. **Address:** [Redacted] Alamo CA 94596
 (No.) (Street) (Apt.) (City) (State) (Zip Code)

3. **Phones:** [Redacted]
 (Home No.) (Work No.) (Cell No.)

4. **Email Address:** [Redacted]

5. **EDUCATION:** Check appropriate box if you possess one of the following:

High School Diploma G.E.D. Certificate California High School Proficiency Certificate

Give Highest Grade or Educational Level Achieved: Baccalaureate with graduate training

Names of colleges / universities attended	Course of Study / Major	Degree Awarded	Units Completed		Degree Type	Date Degree Awarded
			Semester	Quarter		
A) College of Financial Planning	Retirement Plans - Chartered Ret Plan	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>			CRPC	7/2007
B) Institute of Business & Finance	Investments	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>			CFS	6/2004
C) Clark University	Biology	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>		16	BA	6/1985
D) Other schools / training completed:	Course Studied	Hours Completed	Certificate Awarded: Yes No <input type="checkbox"/> <input type="checkbox"/>			

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve on the local appointive body. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) From <u> </u> To <u> </u> 8/1/2001 Present Total: Yrs. <u> </u> Mos. <u> </u> 15 7 Hrs. per week <u>40</u> . Volunteer <input type="checkbox"/></p>	<p>Title Financial Advisor Employer's Name and Address Ameriprise Financial 200 Pringle Ave, #550 Walnut Creek, CA 94596</p>	<p>Duties Performed To assist wealthy individuals and businesses and organizations in making smart decisions about money. This can include but not limited to: examining cash flow projections and analyzing changing data, establishing retirement accounts as well as evaluating and recommending investments.</p>
<p>B) Dates (Month, Day, Year) From <u> </u> To <u> </u> Total: Yrs. <u> </u> Mos. <u> </u> Hrs. per week <u> </u> . Volunteer <input type="checkbox"/></p>	<p>Title Employer's Name and Address</p>	<p>Duties Performed</p>
<p>C) Dates (Month, Day, Year) From <u> </u> To <u> </u> Total: Yrs. <u> </u> Mos. <u> </u> Hrs. per week <u> </u> . Volunteer <input type="checkbox"/></p>	<p>Title Employer's Name and Address</p>	<p>Duties Performed</p>
<p>D) Dates (Month, Day, Year) From <u> </u> To <u> </u> Total: Yrs. <u> </u> Mos. <u> </u> Hrs. per week <u> </u> . Volunteer <input type="checkbox"/></p>	<p>Title Employer's Name and Address</p>	<p>Duties Performed</p>

7. How did you learn about this vacancy?

CCC Homepage Walk-In Newspaper Advertisement District Supervisor Other

8. Do you have a Familial or Financial Relationship with a member of the Board of Supervisors? (Please see Board Resolution no. 2011/55, attached): No Yes

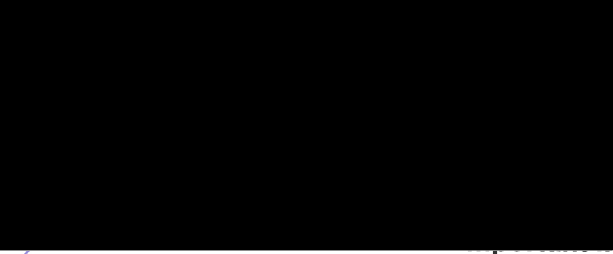
If Yes, please identify the nature of the relationship:

9. Do you have any financial relationships with the County such as grants, contracts, or other economic relations? No Yes

If Yes, please identify the nature of the relationship:

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publically accessible. I understand and agree that misstatements / omissions of material fact may cause forfeiture of my rights to serve on a Board Committee, Commission, or other County Office.

Sign Name



Date:

4/6/2017

Information

1. This application is a public document and is subject to the California Public Records Act (CA Gov. Code §6250-6270).
2. Send the completed paper application to the Office of the Clerk of the Board at: **651 Pine Street, Room 106, Martinez, CA 94553.**
3. A résumé or other relevant information may be submitted with this application.
4. All members are required to take the following training: 1) The Brown Act, 2) The Better Government Ordinance, and 3) Ethics Training.
5. Members of boards, commissions, and committees may be required to: 1) file a Statement of Economic Interest Form also known as a Form 700, and 2) complete the State Ethics Training Course as required by AB 1234.
6. Advisory body meetings may be held in various locations and some locations may not be accessible by public transportation.
7. Meeting dates and times are subject to change and may occur up to two days per month.
8. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.



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Accepted Rejected

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

MAIL OR DELIVER TO:
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651 Pine Street, Rm. 106
Martinez, California 94553-1292
PLEASE TYPE OR PRINT IN INK
(Each Position Requires a Separate Application)

BOARD, COMMITTEE OR COMMISSION NAME AND SEAT TITLE YOU ARE APPLYING FOR:

CCERA
PRINT EXACT NAME OF BOARD, COMMITTEE, OR COMMISSION

Seat 5
PRINT EXACT SEAT NAME (if applicable)

1. Name: Allen, Debora A.
(Last Name) (First Name) (Middle Name)

2. Address: Clayton CA 94517
(No.) (Street) (Apt.) (City) (State) (Zip Code)

3. Phones: [Redacted]
(Home No.) (Work No.) (Cell No.)

4. Email Address: [Redacted]

5. EDUCATION: Check appropriate box if you possess one of the following:
High School Diploma G.E.D. Certificate California High School Proficiency Certificate
Give Highest Grade or Educational Level Achieved BS-Business Administration-Accounting

Names of colleges / universities attended	Course of Study / Major	Degree Awarded	Units Completed		Degree Type	Date Degree Awarded
			Semester	Quarter		
A) California State University Sacramento	Business-Accounting	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>			BS	12/1986
B) Golden Gate University	Taxation	Yes No <input type="checkbox"/> <input checked="" type="checkbox"/>	24		MS	
C)		Yes No <input type="checkbox"/> <input type="checkbox"/>				
D) Other schools / training completed: Wharton Business School	Course Studied Adv Investmnet Mgmt HF/RE/Altern Investing	Hours Completed 75	Certificate Awarded: Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>			

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve on the local appointive body. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) <u>From</u> <u>To</u> <input type="text" value="08/2012"/> <input type="text" value="Present"/> Total: <u>Yrs.</u> <u>Mos.</u> <input type="text" value="4"/> <input type="text" value="8"/> Hrs. per week <input type="text" value="10"/> . Volunteer <input checked="" type="checkbox"/></p>	<p>Title <input type="text" value="Principal/Consultant"/> Employer's Name and Address CCCERA 1555 Willow Way Suite 221 Concord, CA 94520</p>	<p>Duties Performed Financial and business consulting</p>
<p>B) Dates (Month, Day, Year) <u>From</u> <u>To</u> <input type="text" value="08/2001"/> <input type="text" value="06/2012"/> Total: <u>Yrs.</u> <u>Mos.</u> <input type="text" value="10"/> <input type="text" value="10"/> Hrs. per week <input type="text" value="50"/> . Volunteer <input type="checkbox"/></p>	<p>Title <input type="text" value="CFO/Shareholder"/> Employer's Name and Address W.E. Lyons Construction Co. 1301 Ygnacio Valley Rd Walnut Creek, CA 94598</p>	<p>Duties Performed Executive management of all administrative functions of the business including finance, accounting, HR, IT, risk management, operational workflow, and marketing.</p>
<p>C) Dates (Month, Day, Year) <u>From</u> <u>To</u> <input type="text" value="2012"/> <input type="text" value="Present"/> Total: <u>Yrs.</u> <u>Mos.</u> <input type="text" value="5"/> <input type="text"/> Hrs. per week <input type="text" value="10-20"/> . Volunteer <input type="checkbox"/></p>	<p>Title <input type="text" value="VP Finance/CFO"/> Employer's Name and Address East County Glass & Window, Inc. 441 E. 10th Street Pittsburg, CA 94565</p>	<p>Duties Performed Oversite of financial issues of construction business.</p>
<p>D) Dates (Month, Day, Year) <u>From</u> <u>To</u> <input type="text" value="01/1998"/> <input type="text" value="07/2002"/> Total: <u>Yrs.</u> <u>Mos.</u> <input type="text" value="4"/> <input type="text" value="6"/> Hrs. per week <input type="text" value="50"/> . Volunteer <input type="checkbox"/></p>	<p>Title <input type="text" value="CPA/Principal Owner"/> Employer's Name and Address Debora Allen, CPA P.O. Box 856 Clayton, CA 94517</p>	<p>Duties Performed Owner of CPA/Consulting firm providing tax and business consulting services.</p>

7. How did you learn about this vacancy?

CCC Homepage Walk-In Newspaper Advertisement District Supervisor Other

8. Do you have a Familial or Financial Relationship with a member of the Board of Supervisors? (Please see Board Resolution no. 2011/55, attached): No Yes

If Yes, please identify the nature of the relationship:

9. Do you have any financial relationships with the County such as grants, contracts, or other economic relations? No Yes

If Yes, please identify the nature of the relationship:

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publically accessible. I understand and agree that misstatements / omissions of material fact may cause forfeiture of my rights to serve on a Board, Committee, or Commission in Contra Costa County.

Sign Name: Date: 3/31/17

Important Information

1. This application is a public document and is subject to the California Public Records Act (CA Gov. Code §6250-6270).
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6. Advisory body meetings may be held in various locations and some locations may not be accessible by public transportation.
7. Meeting dates and times are subject to change and may occur up to two days per month.
8. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.



Debora Allen

Biography

With 25 years of financial management experience in private industries serving in various roles such as Chief Financial Officer, Chief Executive Officer, Tax Manager, Auditor, Controller and Business Owner, Debora Allen is well-known as a hard-working, dedicated change agent who takes on the most challenging problems and emerges with thoughtful, strategic solutions. As a business leader, she has worked tirelessly on formation, operational process improvement, financial management and analysis, mergers and acquisitions, government audits, and executive coaching for businesses and non-profit organizations.

With a Bachelor of Science degree in Business-Accounting from CSU Sacramento, Debora started her career as a Certified Public Accountant for KPMG, where she gained experienced in both the audit and tax disciplines of public accounting. She completed 80 percent of the coursework required for a Master's Degree in Taxation and has certificates in Institutional Investing from Wharton. She holds a CPA license (voluntarily inactive) in the State of California.

In 2011, Debora was appointed to serve as a Board Trustee on the Contra Costa County Employees Retirement System (CCCERA) by the Contra Costa Board of Supervisors. Over the last 5 years, she has spent hundreds of hours in pension-related training programs studying institutional investing, actuarial calculations, and board governance. Training programs included work at the Wharton School of Business and Stanford University. Debora has also served on multiple non-profit boards throughout her career.

In November of 2016, Debora was elected with 65% of the vote to serve as a Director on the Board of San Francisco Bay Area Rapid Transit (BART). In her first 3 months in office, she has developed a reputation for being a fiscal leader on the nine-member BART board. She now also sits as an Alternate Board Member on the Contra Costa Transportation Authority, and a member of the Capitol Corridor and the Pleasant Hill Leasing Association Boards.



Contra
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For Reviewers Use Only:
Accepted Rejected

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

MAIL OR DELIVER TO:

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CLERK OF THE BOARD
651 Pine Street, Rm. 106
Martinez, California 94553-1292

PLEASE TYPE OR PRINT IN INK
(Each Position Requires a Separate Application)

BOARD, COMMITTEE OR COMMISSION NAME AND SEAT TITLE YOU ARE APPLYING FOR:

CCC Employees' Retirement Assoc. Board Trustee

PRINT EXACT NAME OF BOARD, COMMITTEE, OR COMMISSION

PRINT EXACT SEAT NAME (if applicable)

1. **Name:** Cordone Mark John
(Last Name) (First Name) (Middle Name)

2. **Address:** [Redacted] Alamo CA 94507
(No.) (Street) (Apt.) (City) (State) (Zip Code)

3. **Phones:** [Redacted]
(Home No.) (Work No.) (Cell No.)

4. **Email Address:** [Redacted]

5. **EDUCATION:** Check appropriate box if you possess one of the following:

High School Diploma G.E.D. Certificate California High School Proficiency Certificate

Give Highest Grade or Educational Level Achieved: [Redacted]

Names of colleges / universities attended	Course of Study / Major	Degree Awarded	Units Completed		Degree Type	Date Degree Awarded
			Semester	Quarter		
A) [Redacted]	[Redacted]	Yes No <input type="checkbox"/> <input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]	[Redacted]
B) [Redacted]	[Redacted]	Yes No <input type="checkbox"/> <input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]	[Redacted]
C) [Redacted]	[Redacted]	Yes No <input type="checkbox"/> <input type="checkbox"/>	[Redacted]	[Redacted]	[Redacted]	[Redacted]
D) Other schools / training completed: Held Series 7 and Series 6 licensing for over 15 years.	Course Studied [Redacted]	Hours Completed	Certificate Awarded: Yes No <input type="checkbox"/> <input type="checkbox"/>			

THIS FORM IS A PUBLIC DOCUMENT

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve on the local appointive body. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) <u>From</u> <u>To</u> June 2012 June 2015</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 2</p> <p>Hrs. per week <u>60</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p>President and Co-founder</p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p>Journeyman Capital Management 275 Battery Street, 29th Floor San Francisco, CA 94111 Att: Bruce Leppla</p>	<p style="text-align: center;">Duties Performed</p> <p>Journeyman is a Registered Investment Advisory Firm. Duties included initiating contact with institutional and corporate 401K plans and high net individuals to introduce our RIA investment concepts. We were fiduciary to the assets we managed.</p>
<p>B) Dates (Month, Day, Year) <u>From</u> <u>To</u> April 2012 June 2012</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 10 2</p> <p>Hrs. per week <u>60</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p>Vice President</p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p>Janus Capital Group 151 Detroit Street Denver, CO 80206</p>	<p style="text-align: center;">Duties Performed</p> <p>I oversaw a team of 3 sales people responsible for sales and service of institutional retirement plans nationwide. The team serviced \$13 billion from 330 institutional retirement client's assets. We offered Janus Equities and Bonds investment products to US institutional retirement plans.</p>
<p>C) Dates (Month, Day, Year) <u>From</u> <u>To</u> Mar. 1999 April 2002</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 3 1</p> <p>Hrs. per week <u>60</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p>Vice President</p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p>Prudential Institutional Investments 751 Broad Street Newark, NJ 07012</p>	<p style="text-align: center;">Duties Performed</p> <p>Responsible for sales and service of Prudential investment products including Equities, Bonds, Pooled Real Estate, Hedge Funds, etc. to institutional retirement plans on the West Coast.</p>
<p>D) Dates (Month, Day, Year) <u>From</u> <u>To</u> Oct 96 April 1998</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 1 6</p> <p>Hrs. per week <u>60</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p>Vice President</p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p>Sierra Investment Partners 101 Ignacio Valley Road Walnut Creek, CA 94596</p>	<p style="text-align: center;">Duties Performed</p> <p>Responsible for bringing in new business for start up boutique, third party marketing firm. My territory covered the West Coast.</p>

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve on the local appointive body. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) <u>From</u> <u>To</u> June 1995 Oct 1996</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 1 4</p> <p>Hrs. per week <u>60</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p>First Vice President</p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p>Investment Performance Services 570 East York Street Savannah, GA 31401</p>	<p style="text-align: center;">Duties Performed</p> <p>Responsible for making contact with the fiduciaries on large institutional pension funds on the West Coast and introduce our investment consulting services.</p>
<p>B) Dates (Month, Day, Year) <u>From</u> <u>To</u> May 1989 June 1995</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 6 1</p> <p>Hrs. per week <u>60</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p>Vice President</p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p>Union Labor Life Insurance Company 1625 Eye Street Washington, DC 20006</p>	<p style="text-align: center;">Duties Performed</p> <p>Responsible for marketing, sales and service of ULLICO Investment and Insurance products to large Pension Funds and Health and Welfare Funds throughout the update New York region.</p>
<p>C) Dates (Month, Day, Year) <u>From</u> <u>To</u> June 1984 May 1989</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 4 11</p> <p>Hrs. per week <u>40</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p>Pension Fund Administrator</p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p>Oswego Laborers' Retirement and Health Office 23 Mitchell Street Oswego, New York 13126</p>	<p style="text-align: center;">Duties Performed</p> <p>Oversaw the operations and intricacies of both the Pension Fund and Health Fund. Reported to a Board of Trustees and provided quarterly detailed reports including retiree applications, delinquent contributing employers, budgets, and cash flow. Worked closely with Trustees, Fund Attorney, CPA, Actuary and Investment Consultant.</p>
<p>D) Dates (Month, Day, Year) <u>From</u> <u>To</u> Jan 1976 June 1984</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 8 6</p> <p>Hrs. per week <u>40</u> . Volunteer <input type="checkbox"/></p>	<p style="text-align: center;">Title</p> <p>Secretary Treas./Pension Trustee</p> <hr/> <p style="text-align: center;">Employer's Name and Address</p> <p>Oswego Laborers' Retirement Fund 23 Mitchell Street Oswego, New York 13126</p>	<p style="text-align: center;">Duties Performed</p> <p>As Sec. Treas. I was responsible the financial oversight of a \$3 million portfolio. I invested assets to meet future monetary budget needs. As a Pension Trustee, I was fiduciary to assets held in the Pension Fund to benefit plan participants. I worked to ensure the Plan could meet its obligations.</p>

7. How did you learn about this vacancy?

CCC Homepage Walk-In Newspaper Advertisement District Supervisor Other Newspaper Article

8. Do you have a Familial or Financial Relationship with a member of the Board of Supervisors? (Please see Board Resolution no. 2011/55, attached): No Yes

If Yes, please identify the nature of the relationship:

9. Do you have any financial relationships with the County such as grants, contracts, or other economic relations? No Yes

If Yes, please identify the nature of the relationship:

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publically accessible. I understand and agree that misstatements / omissions of material fact may cause forfeiture of my rights to serve on a Board, Committee, or Commission in Contra Costa County.

Sign Name:  Date: March 10, 2017

Important Information

1. This application is a public document and is subject to the California Public Records Act (CA Gov. Code §6250-6270).
2. Send the completed paper application to the Office of the Clerk of the Board at: **651 Pine Street, Room 106, Martinez, CA 94553.**
3. A résumé or other relevant information may be submitted with this application.
4. All members are required to take the following training: 1) The Brown Act, 2) The Better Government Ordinance, and 3) Ethics Training.
5. Members of boards, commissions, and committees may be required to: 1) file a Statement of Economic Interest Form also known as a Form 700, and 2) complete the State Ethics Training Course as required by AB 1234.
6. Advisory body meetings may be held in various locations and some locations may not be accessible by public transportation.
7. Meeting dates and times are subject to change and may occur up to two days per month.
8. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.

THIS FORM IS A PUBLIC DOCUMENT

Objective Offer my broad knowledge and experiences of working closely with large institutional retirement Plans to assist Retirement Plan meet fiduciary obligations to its plan participants.

Experience Retired, June 2012

Journeyman Capital Management, San Francisco CA - President and Co-Founder.

June 2012 to June 2015

- Journeyman is a registered investment advisory firm created to manage union members' tax-qualified assets and assets held within the union and associated entities.

Janus Capital Group, Denver CO - Vice President Taft-Hartley Investment Services

April 2002 to June 2012

- Coach/Player of a three-member Institutional sales team. Managed 4 direct reports. Oversee and direct all aspects of institutional business at Janus Capital Group and its three boutique firms: INTECH, Janus, Perkins Investment
- Institutional team added 330 new institutional clients and \$9 billion in assets over a 10-year period. Created over \$25 million annually
- Responsible for bringing in new sales and providing client service to 70+ Institutional Retirement Plans

Prudential Institutional, Newark, NJ - Vice President

March 1999 to April 2002

- Responsible for marketing, distributing and servicing to Institutional plans in the Western region.
- Developed and maintained relationships with plan sponsors and key Taft-Hartley consultants within Western region

Sierra Investment Partners, Walnut Creek, CA - Vice President

October 1996 to August 1998 at

- Sold 5 new accounts and \$90 million in new sales
- Introduced this start-up investment firm to plan sponsors and investment consultants throughout the Western region

Investment Performance Services LLC, Savannah GA - First Vice President

June 1995 to October 1996

- Opened this East coast based firm's first West Coast consulting office
- Succeeded in participating in 10 investment consulting new business finals for Taft-Hartley plans

Union Labor Life Insurance Co., Washington DC - Vice President

May 1989 to June 1995 at

- Ranked number one sales person in 1995-1996 with 12 new clients
- Marketed, distributed and serviced Pension and Health products to Institutional plans throughout Upstate New York region

Oswego Laborers Local 214 Pension Fund, Oswego, NY - Fund Administrator

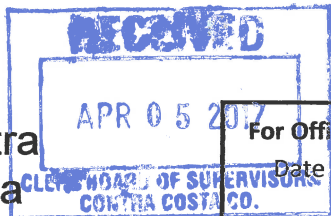
June 1984 to May 1989

- Oversaw all aspects of the Pension Fund and Welfare Fund operations and systems
- Implement, directed and maintained the Fund offices first computer system to track cash flows and benefit contributions by employers and quarterly reporting to trustees

References available on request.



Contra
Costa
County



For Office Use Only

Date Received:

For Reviewers Use Only:

Accepted Rejected

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

MAIL OR DELIVER TO:

Contra Costa County
CLERK OF THE BOARD
651 Pine Street, Rm. 106
Martinez, California 94553-1292
PLEASE TYPE OR PRINT IN INK
(Each Position Requires a Separate Application)

BOARD, COMMITTEE OR COMMISSION NAME AND SEAT TITLE YOU ARE APPLYING FOR:

CCC Employee Retirement Association

Retirement Board Member

PRINT EXACT NAME OF BOARD, COMMITTEE, OR COMMISSION

PRINT EXACT SEAT NAME (if applicable)

1. Name: Darling Frank Norman
(Last Name) (First Name) (Middle Name)

2. Address: [Redacted] Orinda CA 94563
(No.) (Street) (Apt.) (City) (State) (Zip Code)

3. Phones: [Redacted]
(Home No.) (Work No.) (Cell No.)

4. Email Address: [Redacted]

5. EDUCATION: Check appropriate box if you possess one of the following:

High School Diploma G.E.D. Certificate California High School Proficiency Certificate

Give Highest Grade or Educational Level Achieved 18

Names of colleges / universities attended	Course of Study / Major	Degree Awarded	Units Completed		Degree Type	Date Degree Awarded
			Semester	Quarter		
A) Pepperdine University	Business	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>			MBA	1980
B) University of Washington	Management/Leadership	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>			Cert	1975
C) California State University-Sacramento	Business Administration	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>	124		BS	1970
D) Other schools / training completed:	Course Studied	Hours Completed	Certificate Awarded: Yes No <input type="checkbox"/> <input type="checkbox"/>			

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve on the local appointive body. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) From <u> </u> To <u> </u> 7/2014 7/2015</p> <p>Total: Yrs. <u> </u> Mos. <u> </u> 1 <u> </u></p> <p>Hrs. per week <u> </u> . Volunteer <input type="checkbox"/></p>	<p>Title CCC Grand Jury</p> <p>Employer's Name and Address CCC Superior Court Martinez, CA</p>	<p>Duties Performed County Committee Chairman</p>
<p>B) Dates (Month, Day, Year) From <u> </u> To <u> </u> 2008 2011</p> <p>Total: Yrs. <u> </u> Mos. <u> </u> 3 <u> </u></p> <p>Hrs. per week <u> </u> . Volunteer <input type="checkbox"/></p>	<p>Title President, Orinda Rotary Endowment</p> <p>Employer's Name and Address Rotary Club of Orinda PO Box 44 Orinda, CA 94563</p>	<p>Duties Performed Led Endowment Board; established budgeting/planning/gifting process; increased Endowment from \$280K to over \$600K; utilized Calif Investment Series 6 and 63 license.</p>
<p>C) Dates (Month, Day, Year) From <u> </u> To <u> </u> 2006 2017</p> <p>Total: Yrs. <u> </u> Mos. <u> </u> 11 <u> </u></p> <p>Hrs. per week <u> </u> . Volunteer <input type="checkbox"/></p>	<p>Title Account Director, Taproot Foundation</p> <p>Employer's Name and Address Taproot Foundation 1700 Broadway Oakland, CA 94612</p>	<p>Duties Performed Recruit/staff/organize teams that provide consulting services to non-profits; completed 11 projects (each last about 6 months)</p>
<p>D) Dates (Month, Day, Year) From <u> </u> To <u> </u> 1970 2001</p> <p>Total: Yrs. <u> </u> Mos. <u> </u> 31 <u> </u></p> <p>Hrs. per week <u> </u> . Volunteer <input type="checkbox"/></p>	<p>Title Vice President, GM, Printing/Publishing</p> <p>Employer's Name and Address Georgia Pacific 133 Peachtree St. NE Atlanta, GA 30303</p>	<p>Duties Performed Led a \$1Billion business with 8 paper mills. Involved in all aspects of business including labor negotiations. During career had 2 manufacturing assignments in union mills.</p>

7. How did you learn about this vacancy?

CCC Homepage Walk-In Newspaper Advertisement District Supervisor Other Grand Jury

8. Do you have a Familial or Financial Relationship with a member of the Board of Supervisors? (Please see Board Resolution no. 2011/55, attached): No Yes

If Yes, please identify the nature of the relationship:

9. Do you have any financial relationships with the County such as grants, contracts, or other economic relations? No Yes

If Yes, please identify the nature of the relationship:

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publically accessible. I understand and agree that misstatements / omissions of material fact may cause forfeiture of my rights to serve on a Board, Committee, or Commission in Contra Costa County.

Sign Name [REDACTED] Date: 3/31/17

Important Information

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3. A résumé or other relevant information may be submitted with this application.
4. All members are required to take the following training: 1) The Brown Act, 2) The Better Government Ordinance, and 3) Ethics Training.
5. Members of boards, commissions, and committees may be required to: 1) file a Statement of Economic Interest Form also known as a Form 700, and 2) complete the State Ethics Training Course as required by AB 1234.
6. Advisory body meetings may be held in various locations and some locations may not be accessible by public transportation.
7. Meeting dates and times are subject to change and may occur up to two days per month.
8. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.

FRANK DARLING

Orinda, CA 94563

Phone:

E-mail

PROFESSIONAL SUMMARY

Creative and entrepreneurial senior executive with broad and extensive experience in profit & loss management, operations and manufacturing, marketing and sales in both US and export markets. Successful in building energetic and motivated organizations, growing revenues, decreasing costs, and improving overall customer satisfaction for Fortune 500 companies. Unique and highly developed skills in team building and focusing organizations on key leverage points to achieve outstanding results.

PROFESSIONAL EXPERIENCE

ALLOYLED, PARTNER

ELEMENTALLED, PARTNER

TAPROOT FOUNDATION, ACCOUNT DIRECTOR

2001-PRESENT

GUITARS NOT GUNS, CALIFORNIA PRESIDENT

JFK UNIVERSITY MBA- TAUGHT INTERNATIONAL MARKETING, ORG CULTURES, MANAGING THE WORKPLACE

NORTHSTAR CLUB- OPERATIONAL/MGMT TRANSITION PLAN

GEORGIA-PACIFIC CORPORATION

12/2000-10/2001

Vice President

Responsibility: \$1 Billion in sales, from 6 producing mills, with 125 people focused on merchant and publishing distribution in the US.

- Reorganized sales and customer service which reduced costs by \$700,000/year.
- Created a more efficient pricing process that responded to customer requests more timely.
- Initiated design for a more customer friendly order fulfillment process that will lead to improved customer satisfaction.
- Replaced lower profit export business with domestic sales for a bottom line improvement of \$18 Million/year.
- Integrated Fort James into the GP culture.

FORT JAMES CORPORATION (acquired by GP)

06/1997-12/2000

Vice President

Responsibility: \$500 Million in sales, from 2 producing mills, with 50 people focused on uncoated free sheet markets in US and Pacific Rim.

- Integrated 2 businesses together to create one, and re-staffed as a result of a spin-off of half of my division into a new company. Staffing reduction of 20%.
- Increased overall customer satisfaction to 92% by improving services, upgrading personnel through training and development, and a redesigned order fulfillment processes.
- Reduced costs overall from \$40-70/tons vs. 1995 cost. Total savings of over \$28 Million.
- Introduced first sales incentive plan which improved sales by 15% the first year.

JAMES RIVER CORPORATION (merged with Fort Howard, renamed Ft James)

01/1988-06/1997

Vice President-General Manager

Responsibility: \$700 Million in sales, from 6 producing mills, with 150 people focused on North American and Pacific Rim.

- Reduced administration costs by 50% over a 2 year period saving \$500,000.... Developed flat, lean entrepreneurial organization.
- Improved profit by \$25 Million with upgraded product mix.
- Executed a formalized customer satisfaction strategy with 50 key metrics.
- In 1995, remained with JR to lead Communication Papers after asset spin-off and developed focused business on the Western US and Pacific Rim.

Assistant Resident Manager, Wauna, Oregon pulp and paper facility (08/89-01/92)

Responsibility: Lead the entire manufacturing process from pulp to finished product for a 250,000 ton printing & writing mill, 225 people.

- Converted uncoated freesheet process to alkaline chemistry and reduced cost by \$35 per ton.
- Simplified product line which increased productivity by a sustainable 10% per year, an incremental 25,000 tons of capacity.
- Introduced and developed a TQ process to improve productivity by 10% and profit by an incremental \$5 Million.
- Led the Safety Advisory Committee and reduced incident rate to below 1.0 in 1990 and 1991.

Vice President-Sales, Premium Printing Papers (01/88-08/89)

Responsibility: \$100 Million in sales, from 5 producing mills, with 25 person national sales force.

- Introduced 3 new product lines which added \$2 Million to bottom line and led to record year in profit.
- Focused business on 2 merchants per market and eliminated 150 merchants throughout the US.
- Restructured organization and reduced staff by 20% for a savings of \$200,000/year.

Other Professional Experience includes key positions with Crown Zellerbach and Scott Paper Company.

EDUCATION**PEPPERDINE UNIVERSITY,**

MBA, Graduate School of Business & Management

UNIVERSITY OF WASHINGTON,

EXECUTIVE MANAGEMENT PROGRAM, Graduate School of Business

CALIFORNIA STATE UNIVERSITY, Sacramento, CA

BS, Business Administration

PROFESSIONAL DEVELOPMENT:

James River Institute
 Goldratt Institute, Theory of Constraints
 Xerox, Management Discussion Skills
 Pacific Lutheran University, Marketing Planning
 Pacific Institute, Leadership

Civic/Industry Experience

2006-Present	Account Director, Taproot Foundation
2014-2015	Contra Costa Grand Jury, County Committee Chair
2006	Acalanes School District, Strategic Planning Team
2005-2014	President, Guitars Not Guns of California
2004-2015	Court Appointed Special Advocate-Contra Costa County
2003-Present	Orinda Rotary Club (President 2011-12) (Endowment President 2008-11)
2001-2003	Professor, JFK University, MBA Program
2001-2005	Vice President, Board of Directors, Northstar Club
1999-2001	International Trade Advisory, Department of Commerce
1997-2001	Printing Paper Distribution Council, NPTA
1998-2004	Chairman, Parks & Recreation Commission, City of Orinda
1997-1998	Amigos
1997	Boy Scouts, Area Commissioner
1996-1997	Boy Scouts, Scoutmaster
1992-2001	City Club of SF
1992-1994	IBFI, Marketing and Economic Committee



Contra
Costa
County



For Office Use Only
Date Received:

For Reviewers Use Only:
Accepted Rejected

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

MAIL OR DELIVER TO:
Contra Costa County
CLERK OF THE BOARD
651 Pine Street, Rm. 106
Martinez, California 94553-1292
PLEASE TYPE OR PRINT IN INK
(Each Position Requires a Separate Application)

BOARD, COMMITTEE OR COMMISSION NAME AND SEAT TITLE YOU ARE APPLYING FOR:

CCC Employees' Retirement Association Bd

Alternate to Members 4, 5, 6 & 9

PRINT EXACT NAME OF BOARD, COMMITTEE, OR COMMISSION

PRINT EXACT SEAT NAME (if applicable)

1. **Name:** Holcombe Jerry Reid
(Last Name) (First Name) (Middle Name)

2. **Address:** [Redacted] Walnut Creek CA
(No.) (Street) (Apt.) (City) (State) (Zip Code)

3. **Phones:** [Redacted]
(Home No.) (Work No.) (Cell No.)

4. **Email Address:** [Redacted]

5. **EDUCATION:** Check appropriate box if you possess one of the following:

High School Diploma G.E.D. Certificate California High School Proficiency Certificate

Give Highest Grade or Educational Level Achieved _____

Names of colleges / universities attended	Course of Study / Major	Degree Awarded	Units Completed		Degree Type	Date Degree Awarded
			Semester	Quarter		
A) California Polytechnic State University, San Luis Obispo	Biological Sciences	Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>		198	BS	06/1969
B)		Yes <input type="checkbox"/> No <input type="checkbox"/>				
C)		Yes <input type="checkbox"/> No <input type="checkbox"/>				
D) Other schools / training completed:	Course Studied	Hours Completed	Certificate Awarded: Yes <input type="checkbox"/> No <input type="checkbox"/>			

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve on the local appointive body. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) <u>From</u> <u>To</u> 6/2008 2/2016</p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 8 8</p> <p>Hrs. per week <u>N/A</u> . Volunteer <input checked="" type="checkbox"/></p>	<p>Title Alternate Member 4, 5, 6 & 9, CCCER</p> <hr/> <p>Employer's Name and Address CCC Employees' Retirement Association, 1355 Willow Way, Suite 221, Concord, CA 94520</p>	<p>Duties Performed The Board of Retirement is responsible for general management of the association. The Board adopts regulations, policies and procedures that are relevant to CCCERA, for the purpose of benefiting the members.</p>
<p>B) Dates (Month, Day, Year) <u>From</u> <u>To</u> 4/10/1974 1/1/2006, <i>retired</i></p> <p>Total: <u>Yrs.</u> <u>Mos.</u> 31 9</p> <p>Hrs. per week <u>60</u> . Volunteer <input checked="" type="checkbox"/></p>	<p>Title Senior Vice President, General Service</p> <hr/> <p>Employer's Name and Address Delta Dental Plan of California, 100 First Street, San Francisco, CA 94105</p>	<p>Duties Performed Career executive administrative oversight responsibilities included Human Resources (including chair of the corporate 401-K committee), Corporate Communications, Public Relations, Advertising, Corporate Services, Claims Processing, Customer Service, Information Technology, and Legal.</p>
<p>C) Dates (Month, Day, Year) <u>From</u> <u>To</u></p> <p>Total: <u>Yrs.</u> <u>Mos.</u></p> <p>Hrs. per week _____ . Volunteer <input checked="" type="checkbox"/></p>	<p>Title</p> <hr/> <p>Employer's Name and Address</p>	<p>Duties Performed</p>
<p>D) Dates (Month, Day, Year) <u>From</u> <u>To</u></p> <p>Total: <u>Yrs.</u> <u>Mos.</u></p> <p>Hrs. per week _____ . Volunteer <input checked="" type="checkbox"/></p>	<p>Title</p> <hr/> <p>Employer's Name and Address</p>	<p>Duties Performed</p>

7. How did you learn about this vacancy?

CCC Homepage Walk-In Newspaper Advertisement District Supervisor Other Currently serving on Board

8. Do you have a Familial or Financial Relationship with a member of the Board of Supervisors? (Please see Board Resolution no. 2011/55, attached): No Yes

If Yes, please identify the nature of the relationship: _____

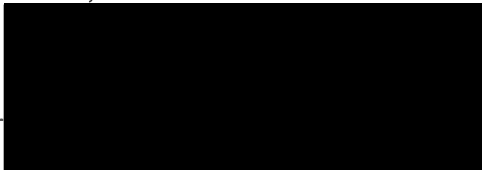
9. Do you have any financial relationships with the County such as grants, contracts, or other economic relations?

No Yes

If Yes, please identify the nature of the relationship: _____

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publically accessible. I understand and agree that misstatements / omissions of material fact may cause forfeiture of my rights to serve on a Board, Committee, or Commission in Contra Costa County.

Sign Name: _____



Date: _____

02/12/2017

Important Information

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3. A résumé or other relevant information may be submitted with this application.
4. All members are required to take the following training: 1) The Brown Act, 2) The Better Government Ordinance, and 3) Ethics Training.
5. Members of boards, commissions, and committees may be required to: 1) file a Statement of Economic Interest Form also known as a Form 700, and 2) complete the State Ethics Training Course as required by AB 1234.
6. Advisory body meetings may be held in various locations and some locations may not be accessible by public transportation.
7. Meeting dates and times are subject to change and may occur up to two days per month.
8. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.

Application Form

Status: submitted

Profile

This application is used for all boards and commissions

Jay _____ Kwon _____
 First Name Middle Initial Last Name

 Email Address

 Home Address Suite or Apt

Danville _____ CA _____ 94526 _____
 City State Postal Code

Home: _____
 Primary Phone

City of San Jose _____ Investment Officer _____ External Investment Manager _____
 Employer Job Title Occupation

Do you, or a business in which you have a financial interest, have a contract with Contra Costa Co.?

Yes No

Is a member of your family (or step-family) employed by Contra Costa Co.?

Yes No

Interests & Experiences

Which Boards would you like to apply for?

Contra Costa County Employees Retirement Association (CCCERA)

Please describe your interest in serving as a member of the board(s) you have selected and if applicable which seat you are applying for.

I am applying for an Appointed Seat on the CCCERA Retirement Board. I am currently an Investment Officer at the Office of Retirement Services for the City of San Jose, and have a deep-seated professional interest in the management of public pension systems. Additionally, as a Contra Costa County resident, I have a vested interest in the health and viability of CCCERA. I feel that I can provide a unique perspective informed by my professional experience working with (and for) public pensions for nearly 15 years.

Have you previously served on a government or non-profit board or committee?

No

Please describe how your education, work experience, or other activities have prepared you to serve on the board or commission you have selected.

I work as an Investment Officer at the Office of Retirement Services for the City of San Jose. I am part of a team that manages a combined \$5B in assets for the City's two defined benefit pension plans. Most of what I do as a part of the investment team is analogous to the role that CCCERA's investment staff performs; my daily professional responsibilities provide directly applicable insights to the issues confronting the CCCERA Board. Additionally, much of my prior work experience involved structuring custom investment solutions for public pensions, which should aid my ability to evaluate the complex issues facing the CCCERA Board. My professional experience, in combination with educational credentials (BA Economics, MA Economics, MBA, CFA and CAIA charter holder), would aid my ability to complete my fiduciary duties as a Board member, and could add value to the existing Board.

[Jay Kwon -- resume.docx](#)

Upload a Resume

Work History

Please provide information on your last three positions, including your current one if you are working.

1st (Most Recent)

9/2/14 - present

Dates (Month, Day, Year) From - To

60

Hours per Week Worked?

Volunteer Work?

Yes No

Investment Officer

Position Title

Employer's Name and Address

1737 North First Street, 6th Floor, San José CA 95112

Duties Performed

Manage the Public Equity allocation of the City's pension plans to maximize plan level risk-adjusted returns

2nd

9/1/08 - 9/1/14

Dates (Month, Day, Year) From - To

60

Hours per Week Worked?

Volunteer Work?

Yes No

Senior Portfolio Manager

Position Title

Employer's Name and Address

Bank of New York Mellon Beta and Transition Management 50 Fremont, Ste 1600, San Francisco, CA 94105

Duties Performed

Lead PM for a product line of derivatives-based hedging and overlay solutions.

3rd

9/1/03 - 9/1/07

Dates (Month, Day, Year) From - To

60

Hours per Week Worked?

Volunteer Work?

Yes No

Portfolio Manager / Trader

Position Title

Employer's Name and Address

Mellon Transition Management Services; San Francisco, CA 50 Fremont, Ste 1600, San Francisco, CA 94105

Duties Performed

Managed fixed income portfolio transitions.

JAY KWON, CFA CAIA

2014-Present: Investment Officer, Public Equities

Office of Retirement Services, City of San Jose; San Jose, CA

Manage the Public Equity allocation of the City's pension plans to maximize plan level risk-adjusted returns.

- Create and implement an allocation structure consistent with the Plans' investment outlook
- Oversee the City's externally managed Public Equity investments; advise the CIO and Board on hiring, resizing, and terminating external investment managers
- Recommend and implement a public equity tactical asset allocation to the CIO and Board

Relevant projects:

- Implemented a passive currency overlay to partially hedge the Plans' non-USD exposure
- Recommended funding the City's first risk premium-based equity strategy
- Utilized the Plans' derivatives overlay to synthetically rebalance equity exposures
- Initiated the Plans' quantitative risk assessment of the Public Equity allocation

2008-2014: Vice President, Senior Portfolio Manager

Bank of New York Mellon Beta and Transition Management; San Francisco, CA

Lead PM for a product line of derivatives-based hedging and overlay solutions.

- Served as the product expert for prospects, clients and investment consultants
- Executed client hedges; developed and maintained appropriate models to calculate trades and rebalances
- Designed and executed trade and rebalancing processes, and managed collateral margining

2003-2007: Fixed Income Portfolio Manager / Trader

Mellon Transition Management Services; San Francisco, CA

Managed fixed income portfolio transitions.

1999-2003: Financial Analyst

Federal Home Loan Bank of San Francisco; San Francisco, CA

Analyzed risks of the FHLBSF interest rate swap portfolio.

1998-1999: Research Analyst

Energy and Environmental Economics, San Francisco, CA

EDUCATION AND CERTIFICATIONS

2008: MBA, University of Oxford, Saïd Business School

2003: MA Economics, CSU Hayward

1998: BA Economics (minor Mathematics), Stanford University

CFA charter holder, CAIA charter holder

Application Form

Status: submitted

Profile

This application is used for all boards and commissions

JOHN _____ B. _____ PHILLIPS _____
 First Name Middle Initial Last Name

 Email Address

 Home Address Suite or Apt

Moraga _____ CA _____ 94556 _____
 City State Postal Code

Home: _____
 Primary Phone

John B. Phillips, CPA _____ Owner _____ Investor/consultant _____
 Employer Job Title Occupation

Do you, or a business in which you have a financial interest, have a contract with Contra Costa Co.?

Yes No

Is a member of your family (or step-family) employed by Contra Costa Co.?

Yes No

Interests & Experiences

Which Boards would you like to apply for?

Contra Costa County Employees Retirement Association (CCCERA)

Please describe your interest in serving as a member of the board(s) you have selected.

My interest is to continue to serve the community/county in which I live by using the actuarial, accounting and managerial skills and experience I have developed over a long professional career. If selected for a third appointed term, I believe that my background and current CCCERA Board experience, including serving as Chair for the current and prior fiscal years, will continue to allow me to remain an effective member of the Board of Retirement.

Have you previously served on a government or non-profit board or committee?

I have served as a board member of the Tau Kappa Epsilon Educational Foundation for approximately the past ten (10) years. This non-profit foundation provides scholarships for qualifying members and supports various educational and leadership programs.

Please describe how your education, work experience, or other activities have prepared you to serve on the board or commission you have selected.

My first career, spanning 31 years, was primarily spent in the employee benefits field where I practiced as a pension actuary and consultant while taking the lead role in building and leading a large actuarial and consulting practice. Consequently, I have a long standing and active interest in the design and operation of pension plans. I am a member of the American Academy of Actuaries and a CPA with an active California license. As the first CEO of a health insurance company now known as CalCPA Health (and formerly known as California CPA ProtectPlus), I established and managed its investment portfolio during my employment tenure and continue to sit on its oversight board finance committee. Finally, my undergraduate degree from the University of California, Berkeley was in finance and, together with MBAs from Cal (emphasis accounting) and Golden Gate University (taxation), my educational background is very aligned with performing the duties of a CCCERA trustee.

[CURRICULUM_VITAE_-_Phillips_2015.rtf](#)

Upload a Resume

Work History

Please provide information on your last three positions, including your current one if you are working.

1st (Most Recent)

1/1/2007 - Present

Dates (Month, Day, Year) From - To

25

Hours per Week Worked?

Volunteer Work?

Yes No

Owner/Investor/Consultant

Position Title

Employer's Name and Address

John B. Phillips, CPA [REDACTED] Moraga, CA 94556

Duties Performed

I operate a number of partnerships and trusts, invest a substantial amount of money for family and friends, serve on both local and national non-profit boards, serve as a board member for CalCPA Health and, for the last six (6) years, have served as a CCCERA board member, the last two (2) as its Chair.

2nd

10/1/1997 - 12/31/2006

Dates (Month, Day, Year) From - To

50

Hours per Week Worked?

Volunteer Work?

Yes No

Chief Executive Officer

Position Title

Employer's Name and Address

CalCPA Health (formerly California CPA ProtectPlus) 1800 Gateway Drive, Suite 201 San Mateo, CA 94404

Duties Performed

Chief Executive for a health insurance company serving the small and medium sized CPA firm community.

3rd

9/1/1966 - 9/30/1997

Dates (Month, Day, Year) From - To

50

Hours per Week Worked?

Volunteer Work?

Yes No

Regional Managing Partner

Position Title

Employer's Name and Address

PwC (formerly PricewaterhouseCoopers) San Francisco, CA

Duties Performed

West Region Managing Partner for the Human Resources Advisory Group of Coopers & Lybrand (I retired just prior to the merger of Coopers & Lybrand with Price Waterhouse), with approximately 200 employees in practice groups in Los Angeles, San Francisco and Seattle.

CURRICULUM VITAE

Name: John B. Phillips

Reason for Desiring to Serve as a Trustee: In my two previous careers I served as both an employee benefits consultant and as the first executive director of the Group Insurance Trust. I believe that both of those long term roles, together with my accounting, actuarial and tax background have been, and will continue to be, of significant value in my meeting my responsibilities as a member of the Board of Trustees.

Professional Experience:

2007-Present	Consultant/Investor
2011-Present Chair	Member of the Board of Trustees (and current Chair)
1974 – 1997	Regional Managing Partner, Coopers & Lybrand (now PricewaterhouseCoopers), West Region, Human Resource Advisory Group
1966 – 1974	Professional Staff, Coopers & Lybrand

Professional Affiliations:

1972 – Present	Board of Trustees of the Group Insurance Trust (and the predecessor Administrative Committee of the Group Insurance Trust)
1968 – Present	California Society of CPAs
1970 – 2006	Western Pension and Benefits Conference
1976 – Present	American Academy of Actuaries
1998 – 2006	California Association of Small Employer Health Plans
1998 – 2006	The Association Healthcare Coalition
1997 – 2006	Self-Insurance Institute of America

Education:

1962	BS, University of California, Berkeley	1963
1966	MBA, University of California, Berkeley	
1972	MBA (taxation), Golden Gate University	

Professional Licenses:

1967	Certified Public Accountant - California	1968
1976	Enrolled Actuary	



Contra
Costa
County

RECEIVED
APR 05 2017
CLERK OF SUPERVISORS
CONTRA COSTA CO.

For Office Use Only
Date Received:

For Reviewers Use Only:
Accepted Rejected

BOARDS, COMMITTEES, AND COMMISSIONS APPLICATION

MAIL OR DELIVER TO:
Contra Costa County
CLERK OF THE BOARD
651 Pine Street, Rm. 106
Martinez, California 94553-1292
PLEASE TYPE OR PRINT IN INK
(Each Position Requires a Separate Application)

BOARD, COMMITTEE OR COMMISSION NAME AND SEAT TITLE YOU ARE APPLYING FOR:

CONTRA COSTA COUNTY EMPLOYEES' RETIREMENT ASSOCIATION BOARD TRUSTEE
PRINT EXACT NAME OF BOARD, COMMITTEE, OR COMMISSION PRINT EXACT SEAT NAME (if applicable)

1. Name: REIGLE DENNIS RUSSELL
(Last Name) (First Name) (Middle Name)

2. Address: [Redacted] ALAMO CA 94507
(No.) (Street) (Apt.) (City) (State) (Zip Code)

3. Phones: [Redacted]
(Home No.) (Work No.) (Cell No.)

4. Email Address: [Redacted]

5. EDUCATION: Check appropriate box if you possess one of the following:
High School Diploma G.E.D. Certificate California High School Proficiency Certificate

Give Highest Grade or Educational Level Achieved 12

Names of colleges / universities attended	Course of Study / Major	Degree Awarded	Units Completed		Degree Type	Date Degree Awarded
			Semester	Quarter		
A) UNIV. OF CINCINNATI	PSYCHOLOGY	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>	120		B.A	06/1969
B) HARVARD	BUSINESS	Yes No <input checked="" type="checkbox"/> <input type="checkbox"/>	60		MBA	06/1969
C)		Yes No <input type="checkbox"/> <input type="checkbox"/>				
D) Other schools / training completed:	Course Studied	Hours Completed	Certificate Awarded: Yes No <input type="checkbox"/> <input type="checkbox"/>			

6. PLEASE FILL OUT THE FOLLOWING SECTION COMPLETELY. List experience that relates to the qualifications needed to serve on the local appointive body. Begin with your most recent experience. A resume or other supporting documentation may be attached but it may not be used as a substitute for completing this section.

<p>A) Dates (Month, Day, Year) From <u>1/7/2007</u> To <u>3/31/2013</u> Total: Yrs. <u>6</u> Mos. <u>2</u> Hrs. per week <u>40</u>. Volunteer <input type="checkbox"/></p>	<p>Title <u>DIRECTOR, ACAD & CAREER DEVELOP.</u> Employer's Name and Address <u>AMERICAN INSTITUTE OF CPAs</u> <u>220 LEIGH FARMS RD.</u> <u>DURHAM, N.C. 27707</u></p>	<p>Duties Performed <u>CAREER DEVELOPMENT & DIVERSITY PROGRAMS</u> <u>SECRETARY,</u> <u>AICPA FOUNDATION</u></p>
<p>B) Dates (Month, Day, Year) From <u>9/5/1977</u> To <u>8/31/2003</u> Total: Yrs. <u>24</u> Mos. <u></u> Hrs. per week <u>40</u>. Volunteer <input type="checkbox"/></p>	<p>Title <u>PARTNER</u> Employer's Name and Address <u>ARTHUR ANDERSEN LLP</u> <u>33 W. MONROE</u> <u>CHICAGO, IL 60602</u></p>	<p>Duties Performed <u>FIRM WIDE:</u> <ul style="list-style-type: none"> • CHAIR, INVESTMENT COMM. • SECRETARY & TRUSTEE, ANDERSEN FOUNDATION • MP - PARTNER MATTERS • MP - HUMAN RESOURCES • MP - ACCOUNTING & UNIVERSITY RELATIONS </p>
<p>C) Dates (Month, Day, Year) From <u>1992</u> To <u>2003</u> Total: Yrs. <u></u> Mos. <u></u> Hrs. per week <u></u>. Volunteer <input type="checkbox"/></p>	<p>Title <u>TRUSTEE</u> Employer's Name and Address <u>WOODROW WILSON NATIONAL FELLOWSHIP FOUNDATION</u> <u>5 JAVONN DRIVE</u> <u>PRINCETON, N.J. 08540</u></p>	<p>Duties Performed <u>BOARD COMMITTEES</u></p>
<p>D) Dates (Month, Day, Year) From <u></u> To <u></u> Total: Yrs. <u></u> Mos. <u></u> Hrs. per week <u></u>. Volunteer <input type="checkbox"/></p>	<p>Title <u></u> Employer's Name and Address <u></u></p>	<p>Duties Performed <u></u></p>

7. How did you learn about this vacancy?

CCC Homepage Walk-In Newspaper Advertisement District Supervisor Other

8. Do you have a Familial or Financial Relationship with a member of the Board of Supervisors? (Please see Board Resolution no. 2011/55, attached): No Yes

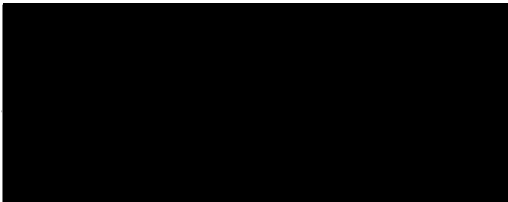
If Yes, please identify the nature of the relationship:

9. Do you have any financial relationships with the County such as grants, contracts, or other economic relations? No Yes

If Yes, please identify the nature of the relationship:

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publically accessible. I understand and agree that misstatements / omissions of material fact may cause forfeiture of my rights to serve on a Board, Committee, or Commission in Contra Costa County.

Sign Name:



Date: 4/2/2017

Important Information

1. This application is a public document and is subject to the California Public Records Act (CA Gov. Code §6250-6270).
2. Send the completed paper application to the Office of the Clerk of the Board at: **651 Pine Street, Room 106, Martinez, CA 94553.**
3. A résumé or other relevant information may be submitted with this application.
4. All members are required to take the following training: 1) The Brown Act, 2) The Better Government Ordinance, and 3) Ethics Training.
5. Members of boards, commissions, and committees may be required to: 1) file a Statement of Economic Interest Form also known as a Form 700, and 2) complete the State Ethics Training Course as required by AB 1234.
6. Advisory body meetings may be held in various locations and some locations may not be accessible by public transportation.
7. Meeting dates and times are subject to change and may occur up to two days per month.
8. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.

Dennis R. Reigle

Biography

Denny was Managing Partner, Partner Matters and Human Resources, North America, at Arthur Andersen LLP prior to electing early retirement on August 31, 2001. He was also responsible for Recruiting and University Relations, served as Secretary and Trustee of the Andersen Foundation, and chaired the Investment Committee for pension and profit sharing plans. His human capital responsibilities included compensation, immigration, relocation, benefits, and all people related policies.

Prior to joining Andersen in New York City in 1977, Denny spent 8 years in the not-for-profit sector, including positions working at and with Historically Black Colleges and Universities (HBCU's), the Woodrow Wilson Foundation, and the New Jersey Commission on Financing Postsecondary Education.

Denny has served on the boards of trustees and directors for numerous educational and philanthropic organizations. Examples include: the Graduate Management Admissions Council (GMAT) as Board Chair, the Woodrow Wilson Foundation as trustee, the PhD Project (increasing minority business discipline PhDs and professors) as Board Chair, AIESEC, U.S. as Board Chair, and Beta Alpha Psi (accounting/finance/IT honorary and service organization) as President and Board Chair.

He had received several honors and awards, including induction into the National Association of Colleges and Employers Academy of Fellows (first corporate member so honored), American Accounting Association Lifetime Service Award (first recipient), Federation of Schools of Accountancy Practitioner of the Year (twice), and Beta Alpha Psi President's Award and also Lifetime Service Award.

Denny has an M.B.A. from the Harvard Graduate School of Business, and a B.A. in liberal arts from the University of Cincinnati, where he was recognized as the Outstanding Graduating Athlete and the Outstanding Graduate of the College of Arts and Sciences. He married his college sweetheart and is the proud father of two daughters and the grandfather of four grandchildren.

Application Form

Status: submitted

Profile

This application is used for all boards and commissions

Kurt _____ Schneider _____
First Name Middle Initial Last Name

Email Address

_____ Suite or Apt _____
Home Address

Richmond CA 94803
City State Postal Code

Mobile: _____
Primary Phone

CalPERS Senior Pension Actuary Pension Actuary
Employer Job Title Occupation

Do you, or a business in which you have a financial interest, have a contract with Contra Costa Co.?

Yes No

Is a member of your family (or step-family) employed by Contra Costa Co.?

Yes No

Interests & Experiences

Which Boards would you like to apply for?

Contra Costa County Employees Retirement Association (CCCERA)

Please describe your interest in serving as a member of the board(s) you have selected.

I am interested in serving on the Board of the Contra Costa County Employees' Retirement Association (CCCERA), because I believe its mission is important to the welfare and retirement security of the County's employees and to the economic health of the County itself as well as of the County's residents and taxpayers. CCCERA's mission is to deliver retirement benefits to members and their beneficiaries through prudent asset management and effective administration, in accordance with all plan provisions. By statute, the management of CCCERA is vested in the Board, and it is only through responsible management and oversight by the Board that CCCERA can hope to fulfill its mission in a cost effective way. Defined benefit plans such as CCCERA are complex, costly and fraught with risks, which are difficult for a layperson to understand, let alone manage. I believe my knowledge of and experience in the public sector pension field would be an asset to the Board, CCCERA members, and plan sponsors such as the County.

Have you previously served on a government or non-profit board or committee?

No, however I am very familiar with the proceedings of retirement boards, having presented to retirement boards in three states including a number of California counties. For the CCCERA Board, in particular, I have prepared and presented numerous agenda items in both open and closed session, and I have a good working knowledge of the Brown Act, which governs open meetings for local government bodies such as the CCCERA Board.

Please describe how your education, work experience, or other activities have prepared you to serve on the board or commission you have selected.

After receiving a master's degree in mathematics from the University of California, Berkeley, I began an actuarial career with a consulting firm. I continued my education through the actuarial exam process and am currently a Member of the American Academy of Actuaries, an Associate of the Society of Actuaries, and a Fellow of the Conference of Consulting Actuaries. At my first actuarial job I worked mainly on pension plans for corporate and multiemployer clients. From 2007 through 2012, while at Segal, I worked exclusively on public sector retirement plans including several California county systems such as Orange CERS, Alameda CERA and even CCCERA. I performed and reviewed actuarial valuations, experience studies and a variety of cost studies. I also projected the effects of changes in plan provisions, asset smoothing methods and amortization policies. In 2012 I was appointed Deputy CEO of CCCERA where I served until 2015. Over various periods I oversaw the benefits, member services and accounting divisions, and while the CEO position was vacant in 2014, I oversaw all three. During this time I became extremely familiar with the day to day operations of these divisions and how they interact with one another. As the Deputy CEO I also played a lead role in implementing the 2013 statewide pension reform, PEPPRA. Implementing PEPPRA required educating CCCERA plan sponsors and members on new rules related to working after retirement, programming new benefit tiers in the pension administration system and developing a variety of new policies and procedures. During my time at CCCERA I also maintained a good working relationship with plan sponsors, consultants and service providers. I am currently a senior pension actuary with CalPERS, the nation's largest public pension fund. In that capacity I review actuarial and accounting valuations for over a hundred plans within CalPERS. I am currently working on the experience study to develop new economic and demographic assumptions for all of CalPERS and its affiliate funds. As a member of the actuarial special projects team I work on a wide variety of projects such as analyzing the impact of proposed legislation and developing board policies like the contribution allocation policy. I also represent the actuarial office within CalPERS by serving on the Strategic Measures Team and the Asset Liability Management Team where I provide both quantitative and qualitative input. I believe my education and work experience have prepared me to serve on the CCCERA Board. My actuarial experience has allowed me to develop a deep understanding of virtually every issue currently facing governmental defined benefit plans, and my work at CCCERA and CalPERS has given me a healthy appreciation of the complexities of administering such a system.

[KURT_SCHNEIDER.pdf](#)

Upload a Resume

Work History

Please provide information on your last three positions, including your current one if you are working.

1st (Most Recent)

4/25/2016 - Present

Dates (Month, Day, Year) From - To

40

Hours per Week Worked?

Volunteer Work?

Yes No

Senior Pension Actuary

Position Title

Employer's Name and Address

CalPERS 400 Q Street Sacramento, CA 95811

Duties Performed

• Assist in developing and updating actuarial policies, procedures and directives • Review, analyze and provide actuarial cost implications of proposed pension legislation • Perform and review actuarial valuations to establish rates for participating employers • Perform and review accounting valuations to provide financial disclosure information to CalPERS and to participating employers • Perform experience investigations and produce demographic and economic studies upon which to base actuarial assumptions • Provide information to CalPERS departments, the State, participating agencies and members on actuarial issues

2nd

1/17/2012 - 9/28/2015

Dates (Month, Day, Year) From - To

40

Hours per Week Worked?

Volunteer Work?

Yes No

Deputy Retirement Chief Executive Officer

Position Title

Employer's Name and Address

CCCERA 1355 Willow Way, Suite 221 Concord, CA 94520

Duties Performed

• Assisted the CEO in representing the Board of Retirement on matters concerning retirement • Directed and oversaw the activities of the benefits and accounting divisions and provided policy guidance as it relates to the processing of retirement benefits • Managed changes required due to legislative and regulatory changes including the California Public Employees' Pension Reform Act of 2013 • Collaborated with the Board's actuary in conducting annual valuations, experience studies and ad hoc reports • Identified operational and administrative problems and systems inefficiencies; developed and implement solutions to include facilitating compliance with regulatory statutes • Evaluated and monitored work performance of managers and staff • Interviewed job candidates and assisted in the evaluation process

3rd

6/4/2007 - 1/13/2012

Dates (Month, Day, Year) From - To

40

Hours per Week Worked?

Volunteer Work?

Yes No

Associate Actuary

Position Title

Employer's Name and Address

Segal Consulting 100 Montgomery Street, 5th Floor San Francisco, CA 94104

Duties Performed

• Managing actuary for two large statewide PERS plans (Nevada and North Dakota) and reviewing actuary for several county, city and university systems ranging from \$2 billion to \$50 billion in liabilities. Included scheduling and budgeting the work, working directly with analysts to ensure the work is completed on time and in accordance with company quality control procedures, and working with senior consultants to finalize work • Reviewed valuations, experience studies and cost studies for public sector retirement systems • Projected the effects of changes in plan provisions, asset smoothing methods, and amortization policies • Discussed and presented valuation results and projections with administrators and retirement boards • Managed 415(b) compliance for public sector clients

KURT SCHNEIDER, ASA, FCA, MAAA

Richmond, CA 94803 • C: [REDACTED] • W: [REDACTED]

OBJECTIVE

An appointment to the Board of Retirement

PROFESSIONAL EXPERIENCE

California Public Employees' Retirement System (CalPERS)

Senior Pension Actuary

Sacramento, CA — April 2016 to Present

Duties Include

- Assist in developing and updating actuarial policies, procedures and directives
- Review, analyze and provide actuarial cost implications of proposed pension legislation
- Perform and review actuarial valuations to establish rates for participating employers
- Perform and review accounting valuations to provide financial disclosure information to CalPERS and to participating employers
- Perform experience investigations and produce demographic and economic studies upon which to base actuarial assumptions
- Provide information to CalPERS departments, the State, participating agencies and members on actuarial issues

Contra Costa County Employees' Retirement Association (CCCERA)

Deputy Chief Executive Officer

Concord, CA — January 2012 to September 2015

Duties performed

- Assisted the CEO in representing the Board of Retirement on matters concerning retirement
- Directed and oversaw the activities of the benefits and accounting divisions and provided policy guidance as it relates to the processing of retirement benefits
- Managed changes required due to legislative and regulatory changes including the California Public Employees' Pension Reform Act of 2013
- Collaborated with the Board's actuary in conducting annual valuations, experience studies and ad hoc reports
- Identified operational and administrative problems and systems inefficiencies; developed and implement solutions to include facilitating compliance with regulatory statutes
- Evaluated and monitored work performance of managers and staff
- Interviewed job candidates and assisted in the evaluation process

Segal Consulting

Associate Actuary

San Francisco, CA — June 2007 to January 2012

Duties performed

- Managing actuary for two large statewide PERS plans (Nevada and North Dakota) and reviewing actuary for several county, city and university systems ranging from \$2 billion to \$50 billion in liabilities. Included scheduling and budgeting the work, working directly with analysts to ensure the work is completed on time and in accordance with company quality control procedures, and working with senior consultants to finalize work
- Reviewed valuations, experience studies and cost studies for public sector retirement systems
- Projected the effects of changes in plan provisions, asset smoothing methods, and amortization policies
- Discussed and presented valuation results and projections with administrators and retirement boards
- Managed 415(b) compliance for public sector clients

Milliman

Associate Actuary

San Francisco, CA — August 1998 to June 2007

Duties performed

- Performed valuations including pension funding valuations for single employer and multiemployer plans, Pension Benefit Guaranty Corporation (PBGC) variable rate premium valuations, FAS 87 and FAS 106 valuations, SOP 92-6 valuations, and distressed termination valuations for the PBGC
- Projected cash funding requirements and accounting expense
- Projected the effect of plan changes and various funding strategies
- Performed retiree medical cost studies and experience studies
- Discussed valuation results and projections with plan sponsors

EDUCATION

University of California, Berkeley

Master of Arts, Mathematics May 1998

University of California, San Diego

Bachelor of Arts, Mathematics, magna cum laude June 1996

PROFESSIONAL CERTIFICATIONS

Associate of the Society of Actuaries, June 2003

Member of the American Academy of Actuaries, June 2003

Fellow of the Conference of Consulting Actuaries, November 2016



Contra Costa County Board of Supervisors

Subcommittee Report

INTERNAL OPERATIONS COMMITTEE

5.

Meeting Date: 05/08/2017

Subject: INTERVIEW CANDIDATES FOR ONE VACANCY ON THE EAST BAY REGIONAL PARKS DISTRICT PARK ADVISORY CTE

Submitted For: David Twa, County Administrator

Department: County Administrator

Referral No.: 17/5

Referral Name: ADVISORY BODY RECRUITMENT

Presenter: Julie DiMaggio Enea, IOC
Staff

Contact: Julie DiMaggio Enea
925.335.1077

Referral History:

On December 12, 2000, the Board of Supervisors approved a policy on the process for recruiting applicants for selected advisory bodies of the Board. This policy requires an open recruitment for all vacancies to At Large seats appointed by the Board. The Board also directed that the IOC personally conduct interviews of applicants for At Large seats on several boards, committees, and commissions including the East Bay Regional Parks District (EBRPD) Park Advisory Committee (PAC).

Referral Update:

East Bay Regional Parks District Park Advisory Committee

The Park Advisory Committee (PAC) is a 21-member citizens' advisory group appointed by the East Bay Regional Park District Board of Directors. Candidates are nominated by individual Park District Board members and a variety of other public entities, such as the Mayors' Conference, Board of Supervisors, and Special District Chapters of Alameda and Contra Costa Counties.

The PAC studies issues and makes recommendations and comments on a spectrum of policy issues, such as grazing, dogs, horses and bikes in parks, the Park District budget, naming park facilities, park land use plans, new concessions, and more. Members are appointed for two-year terms and may serve a total of four consecutive terms, or eight years. Meetings are held monthly in Oakland.

The Board of Supervisors Appointee seat was recently vacated when incumbent Colin Coffey was appointed to the EBRPD Board of Directors. The current term of office will expire on December 31, 2018. Staff initiated recruitment with the attached press release, issued on March 10th with an application deadline of April 7th. The recruitment garnered two applications:

- Bruce Brubaker
- Neil Tsutsui

Recommendation(s)/Next Step(s):

INTERVIEW candidates for the pending vacant seat on the East Bay Regional Parks District Park Advisory Committee and determine recommendation for Board of Supervisors consideration on May 23.

Fiscal Impact (if any):

None. EBRPD Park Advisory Committee members are not compensated.

Attachments

Press Publication EBRPD PAC

Candidate Application Bruce Brubaker EBRPD PAC

Resume Bruce Brubaker EBRPD PAC

Candidate Application Neil Tsutsui EBRPD PAC

Resume Neil Tsutsui EPRPD PAC



Contra Costa County

County Administrator's Office • 651 Pine Street • Martinez, CA 94553 • www.co.contra-costa.ca.us

Media Release

FOR IMMEDIATE RELEASE

Friday, March 10, 2017

Contact: Julie DiMaggio Enea

Phone: (925) 335-1077

Email: julie.enea@cao.cccounty.us

WOULD YOU LIKE TO SERVE ON THE

EAST BAY REGIONAL PARKS DISTRICT PARK ADVISORY COMMITTEE?

The Contra Costa County Board of Supervisors is seeking an individual who is interested in park land use represent the County on the East Bay Regional Parks District Park Advisory Committee (PAC). The PAC is a 21-member citizens' advisory group that studies issues and makes recommendations and comments on a spectrum of policy issues, such as grazing, dogs, horses and bikes in parks, the Park District budget, naming park facilities, park land use plans, new concessions, and more.

Members are appointed for two-year terms and may serve a total of four consecutive terms, or eight years. Service is voluntary and members receive no compensation. Meetings are held in the evenings on the fourth Monday of each month at the Park District Headquarters in Oakland.

Application forms for the Contra Costa County seat can be obtained from the Clerk of the Board of Supervisors by calling (925) 335-1900, or the application can be completed on line by visiting the County website at www.co.contra-costa.ca.us. Applications should be submitted to the Clerk of the Board of Supervisors, Room 106, County Administration Building, 651 Pine Street, Martinez, CA 94553, **no later than 5:00 p.m. on Friday, April 7, 2017**. Applicants should plan to be available for public interviews on Monday, May 8, 2017. Further information about the Park Advisory Committee can be obtained by calling Erich Pfuehler at the East Bay Regional Parks District at (510) 544-2006.

###

Application Form

Status: submitted

Profile

This application is used for all boards and commissions

<u>Bruce</u>	<u>R</u>	<u>Brubaker</u>
First Name	Middle Initial	Last Name

[REDACTED]
 Email Address

<u>[REDACTED]</u>	<u>[REDACTED]</u>
Home Address	Suite or Apt

<u>Richmond</u>	<u>CA</u>	<u>94801</u>
City	State	Postal Code

Mobile: [REDACTED]
 Primary Phone

<u>PlaceWorks</u>	<u>Associate Principal</u>	<u>Architect and Urban Designer</u>
Employer	Job Title	Occupation

Do you, or a business in which you have a financial interest, have a contract with Contra Costa Co.?

Yes No

Is a member of your family (or step-family) employed by Contra Costa Co.?

Yes No

Interests & Experiences

Which Boards would you like to apply for?

East Bay Regional Park District's Park Advisory Committee - BOS Appointee

Please describe your interest in serving as a member of the board(s) you have selected.

I have a long standing interest in serving to make Contra Costa's parks and open spaces more accessible to all community members. I am a frequent user of EBRPD regional parks in CC County, including Wildcat Canyon, Point Pinole, Carquinez Regional Shoreline, and Black Diamond Mines Regional Reserve as well as other parks in the system. I have a particular interest in Shoreline parks throughout the County.

Have you previously served on a government or non-profit board or committee?

I am the Vice-chair of TRAC, the Trails for Richmond Action Committee. In the 12 years of serving on this committee I have helped Richmond further it's vision of completing the Bay Trail on the shoreline of the City.

Please describe how your education, work experience, or other activities have prepared you to serve on the board or commission you have selected.

I am trained as an Architect and Urban Designer. In my professional career i have focused on larger scale community improvements such as neighborhood plans and specific plans. Most of my planning efforts involve working with community members on behalf of municipalities or agencies. I have a good understanding of land use, CEQA, and community facilitation.

[Brubaker_Resume_2016.doc](#)

Upload a Resume

Work History

Please provide information on your last three positions, including your current one if you are working.

1st (Most Recent)

1/9/2006 - present

Dates (Month, Day, Year) From - To

40

Hours per Week Worked?

Volunteer Work?

Yes No

Associate Principal

Position Title

Employer's Name and Address

1625 Shattuck Ave, Suite 300

Duties Performed

Manage urban design practice in northern california office of PlaceWorks. Includes managing staff and directing projects.

2nd

1/1/1998 - 1/8/2006

Dates (Month, Day, Year) From - To

40

Hours per Week Worked?

Volunteer Work?

Yes No

Sole Proprietor

Position Title

Employer's Name and Address

Yellow Studio Sustainable Design 311 East Richmond Avenue Richmond CA 94801

Duties Performed

Manage office, practice architecture.

3rd

1/1/1993 - 12/31/1998

Dates (Month, Day, Year) From - To

40

Hours per Week Worked?

Volunteer Work?

Yes No

Associate

Position Title

Employer's Name and Address

Lyndon/Buchanan Associates Ninth Street, Berkeley, CA 94710

Duties Performed

Manage architectural projects from design to construction.



Professional Experience

PlaceWorks, Berkeley, California. Associate Principal. 2005 through present. Head of Urban Design Studio. Principal in charge of a diverse range of urban design projects. Areas of expertise include architecture, site planning, design standards and guidelines, streetscape design, public participation including management of multiday charrettes, and creation of Transit-oriented Development plans, downtown plans, specific plans and neighborhood plans. Notable projects developed under his direction include the Millbrae Station Area Specific Plan, the Gilroy High Speed Rail Station Area Vision Plan, the San Antonio Precise Plan for the City of Mountain View, the Bergamot Area Plan for the City of Santa Monica, the Point Arena Improvement Plan and the Downtown Santa Rosa Station Area Specific Plan for the City of Santa Rosa, among many others.

Yellow Studio Sustainable Design, Point Richmond, California. Founding Principal. 2001 through 2005. Responsible for all aspects of management of an award-winning architecture practice, including conceptual and schematic design, document production, permitting and construction coordination. Projects included residential and light commercial architectural projects. Promoted sustainable design strategies, including energy efficiency, resource conservation and use of healthy building materials.

Lyndon/Buchanan Associates, Berkeley, California. Associate. 1990 through 1998. Project Architect and Project Manager for all phases of architectural and urban design projects, including the *Menlo Park Downtown Urban Design Plan*, master plan, streetscape and building projects for the Bayer Biotechnology Campus in Berkeley, the Nolo Press Building in Berkeley and the Sea Ranch Village near Gualala CA (with Charles Moore and Lawrence Halprin). Responsibilities included production of concept proposals, client presentations, public workshops, schematic design, design development, construction documents and construction coordination.

East Bay Habitat for Humanity, Oakland, California. Project Architect. 1991 through 1995. Responsible for design, construction documents, client coordination, permitting and construction services for Spencer Court, an eight-home volunteer built affordable housing development in Richmond, California.

Education

Master of Architecture, *University of California, Berkeley.*

Residential Course, *International Laboratory for Architecture and Urban Design, Siena, Italy.*

Bachelor of Science, Architecture, *California Polytechnic State University, San Luis Obispo.*

Highlights of Experience

Urban Design - TOD Plans

- »» Millbrae Station Area Specific Plan, Millbrae CA
- »» Gilroy High Speed Train Vision Plan, Gilroy CA
- »» Bergamot Area Plan, Santa Monica CA
- »» West Downtown Walnut Creek Specific Plan and EIR, Walnut Creek CA
- »» Ravenswood/Four Corners Specific Plan and EIR, East Palo Alto CA
- »» Hillsdale Station Area Plan, San Mateo CA
- »» Upland Downtown Specific Plan, Upland CA
- »» Bay Fair BART Station Area Improvement Plan, San Leandro CA
- »» Area Two Concept Plan, Newark CA
- »» Santa Rosa Downtown Station Area Specific Plan, Santa Rosa CA

Urban Design - Downtown Plans

- »» Ceres Downtown Specific Plan and EIR, Ceres CA
- »» West Broadway Urban Village Specific Plan, Seaside CA

Urban Design - Neighborhood / Area Plans

- »» Suisun City Development Feasibility Analysis, Suisun City CA
- »» Kentfield College Avenue Vision Plan, Kentfield CA
- »» Point Arena Action Plan, Mendocino County CA
- »» Southwest Chico Neighborhood Plan, Chico CA
- »» California Avenue Master Plan, Fresno CA
- »» Laytonville Traffic Calming and Downtown Revitalization, Mendocino County CA

Urban Design - Site Planning / Streetscape / Architecture

- »» Antelope Crossing Transformation Project, Citrus Heights CA
- »» Calpella Community Design Project, Mendocino County CA
- »» Waterman Gardens Master Planning, San Bernardino CA
- »» Santa Rosa Avenue Corridor Plan, Santa Rosa CA
- »» Onizuka AFS Redevelopment Plan, Sunnyvale CA
- »» Davis Tools of Engagement/Concept Plans, Davis CA
- »» Miraflores Housing Development Site Plan and EIR, Richmond CA
- »» Integrated Site Development Plan, Petaluma CA

- »» Downtown Infill Conceptual Building Designs, Lafayette CA
- »» Marinwood Village Master Plan, San Rafael CA
- »» Urban Farm Design Service, Treasure Island, San Francisco CA

Urban Design - Transportation / Bicycle Planning

- »» Ventura/Kings Canyon Corridor Revitalization Project, Fresno County CA
- »» Harrison Street Corridor Plan, Oakland CA
- »» City of Alameda Community-Based Transportation Plan, Alameda CA
- »» Regional Blueprint Planning Public Involvement and Outreach, Mendocino CA
- »» Palm Springs Airport Shuttle Demonstration Project, Palm Springs CA

Selected Honors and Awards

Bay Fair BART Station Area Improvement Plan for BART, Alameda County and the City of San Leandro. Northern California Section APA Focused Issue Planning Award of Merit, 2010

Sacramento Railyards Specific Plan and Design Guidelines for Thomas Enterprises. Sacramento Valley Section APA Award for Comprehensive Planning by a Large Jurisdiction, 2008.

Southwest Chico Neighborhood Plan for the City of Chico. Sacramento Valley Section APA Award for Outstanding Neighborhood Planning, 2009.

Downtown Santa Rosa Station Area Specific Plan for the City of Santa Rosa. Northern California Section APA Merit Award for Focused Issue Planning, 2008.

California Avenue Master Plan for the Fresno Housing Authority. California Statewide APA Award for Outstanding Neighborhood Planning, 2008.

Speaking Engagements

“Taking it to the Streets: When Communities Take Immediate Action to Improve Their Own Neighborhoods,” 2015 APACA State Conference, Oakland CA

“Current Planning Issues in California High Speed Rail,” 2015 APACA State Conference, Oakland CA

“Mixed Feelings on Mixed-Use: Revitalizing the Underutilized,” 2014 APACA State Conference, Anaheim CA

“Tribal Gaming and the Fabric of Your Community: Emerging Prospects for Communities with Casinos,” 2014 APACA State Conference, Anaheim CA

“Not All TODs Are Alike,” 2010 APACA State Conference, Carlsbad CA

Teaching Engagements

International Laboratory of Architecture and Urban Design, Course for International University Students, Urbino, Italy.

Competitions

Station Plan for the North Santa Rosa SMART Station, Santa Rosa, California. Award of Merit.

St. Vincent's/Silviera Design Competition, San Rafael, California. Second Place.

Vietnam Women's Memorial Competition, Washington, D.C. Honorable Mention

Thomas Church Award, University of California, Berkeley. First Place.

Registrations and Certifications

California Registered Architect, #C22756

Leadership in Energy and Environmental Design Accredited Professional

Affiliations

U.S. Green Building Council

Urban Land Institute

Congress for the New Urbanism

Leadership and Community

Trails for Richmond Action Committee (TRAC), Vice Chairman

Point Molate Community Advisory Committee, Member

Application Form

Status: submitted

Profile

This application is used for all boards and commissions

Neil _____ D _____ Tsutsui _____
First Name Middle Initial Last Name

[Redacted] _____
Email Address

[Redacted] _____ Suite or Apt _____
Home Address

El Cerrito _____ CA _____ 94530 _____
City State Postal Code

Mobile: [Redacted] _____
Primary Phone

UC Berkeley _____ Professor: Environmental Science, Policy & Management _____ Professor _____
Employer Job Title Occupation

Do you, or a business in which you have a financial interest, have a contract with Contra Costa Co.?

Yes No

Is a member of your family (or step-family) employed by Contra Costa Co.?

Yes No

Interests & Experiences

Which Boards would you like to apply for?

East Bay Regional Park District's Park Advisory Committee - BOS Appointee

Please describe your interest in serving as a member of the board(s) you have selected and if applicable which seat you are applying for.

I am interested in serving on the East Bay Regional Park District's Park Advisory Committee.

Have you previously served on a government or non-profit board or committee?

I have served on many committees within the University of California system including the: Committee on Ecological Preserve and Open Space committee (UC Irvine), campus-wide Committee on Course of Instruction (UC Berkeley; currently), College of Natural Resources Curriculum committee (UCB; currently), and many others. I have also served on several Research Grant Proposal review committees for the National Science Foundation and the US Dept of Agriculture. I am currently on the editorial board for the scientific journals, Biological Invasions and BMC Ecology.

Please describe how your education, work experience, or other activities have prepared you to serve on the board or commission you have selected.

I am currently a Full Professor in the Department of Environmental Science, Policy and Management, in the College of Natural Resources at UC Berkeley (since 2007). I have a PhD in Ecology, Behavior, and Evolution from UC San Diego, post-doctoral research experience at UC Davis, was previously a Professor of Ecology and Evolution at UC Irvine. I have published 57 peer reviewed research papers, many in the most highly regarded scientific journals. I have broad scientific interest and expertise in the fields of entomology, animal behavior, genetics, genomics, and chemical ecology. I recently served four years as the Vice Chair for Instruction and, since 2007, have held an appointment as Faculty Curator in the UCB Essig Museum of Entomology.

[Tsutsui CV_032817.pdf](#)

Upload a Resume

Work History

Please provide information on your last three positions, including your current one if you are working.

1st (Most Recent)

7/1/2007-present

Dates (Month, Day, Year) From - To

40+

Hours per Week Worked?

Volunteer Work?

Yes No

Professor

Position Title

Employer's Name and Address

Department of Environmental Science, Policy, and Management College of Natural Resources 130
Mulford Hall, #3114 UC Berkeley Berkeley CA 94720-3114

Duties Performed

Teaching undergraduate and graduate (PhD) courses in Insect Behavior, Environmental Science Forum, Molecular Approaches to Environmental Problem Solving, Conservation & Resource Studies Senior Seminar, and others. Conceived, designed, executed, and published internationally recognized research on honey bee and ant biology.

2nd

7/1/2003-6/31/2007

Dates (Month, Day, Year) From - To

40+

Hours per Week Worked?

Volunteer Work?

Yes No

Assistant Professor

Position Title

Employer's Name and Address

Dept of Ecology and Evolutionary Biology Steinhaus Hall UC Irvine Irvine CA

Duties Performed

Taught undergraduate courses in Advanced Evolutionary Biology and Social Behavior of Ants, and graduate (PhD) course in Evolutionary Biology. Conceived, designed, executed, and published internationally recognized research on honey bee and ant biology.

3rd

7/1/2000-6/30/2003

Dates (Month, Day, Year) From - To

40+

Hours per Week Worked?

Volunteer Work?

Yes No

Post-doctoral Scholar

Position Title

Employer's Name and Address

Dept of Evolution and Ecology 1 Shields Ave UC Davis Davis CA

Duties Performed

Conceived, designed, executed, and published research on ant behavior, ecology, pheromone communication.

Tsutsui, Neil D.
Curriculum Vitae

CURRICULUM VITAE

NEIL DURIE TSUTSUI

University of California, Berkeley
Department of Environmental Science,
Policy & Management
130 Mulford Hall, #3114
Berkeley CA 94720-3114

EMAIL: [REDACTED]
PH: [REDACTED]
FAX: [REDACTED]
WEB: [REDACTED]

EDUCATION

Boston University, September 1994
B.A. in Biology, specialization in Marine Science, *with honors*.

University of California, San Diego – Department of Biology
Ph. D. in Biology, September 2000
Dr. Ted J. Case – Thesis advisor

PROFESSIONAL APPOINTMENTS

Professor, 2014-present
Associate Professor, 2009-2014
Assistant Professor, 2007-2009
Vice Chair for Instruction, 2010-2012, 2014-2015
Department of Environmental Science, Policy & Management
University of California, Berkeley

Faculty Curator, 2007-present
Essig Museum of Entomology
University of California, Berkeley

Assistant Professor, 2003-2007
Department of Ecology and Evolutionary Biology
University of California, Irvine

Post-doctoral Associate, 2000-2003
Section of Evolution and Ecology, Center for Population Biology
University of California, Davis
Dr. Richard K. Grosberg – Advisor

PUBLICATIONS

58. Cridland, J., **N. D. Tsutsui**, and S. R. Ramírez. 2017 . The complex demographic history and evolutionary origin of the western honey bee, *Apis mellifera*. GENOME BIOLOGY & EVOLUTION evx009. DOI: <https://doi.org/10.1093/gbe/evx009>
57. Mathis, K. A. and **Tsutsui, N. D.** 2016. Dead ant walking: A myrmecophilous beetle predator uses parasitoid host location cues to selective prey on parasitized ants. PROCEEDINGS OF THE ROYAL SOCIETY OF LONDON, B **283**:20161281.
56. Mathis, K. A. and **Tsutsui, N. D.** 2016. Cuticular hydrocarbon cues are used for host acceptance by *Pseudacteon* spp. phorid flies that attack *Azteca sericeasur* ants. JOURNAL OF CHEMICAL ECOLOGY **42**:286-293.
55. Emery, V. J. and **Tsutsui, N. D.** 2016. Differential sharing of chemical cues by social parasites versus social mutualists in a three-species symbiosis. JOURNAL OF CHEMICAL ECOLOGY **42**:277-285.

54. Torres, C. W. and **Tsutsui, N. D.** 2016. The effect of social parasitism by *Polyergus breviceps* on the nestmate recognition system of its host, *Formica altipetens*. PLOS ONE **11**(2): e0147498.
53. **Tsutsui, N. D.** 2014. Controlling the spread of Argentine ants. VOICE OF THE PCOC. Fall:10-11.
52. Tillberg, C.V, Edmonds, B., Freauff, A., Hanisch, P., Paris, C., Smith, C.R., **Tsutsui, N. D.**, Wills, B.D., Wittman, S.E., and A.V Suarez. 2014. Foraging ecology of the tropical giant hunting ant *Dinoponera australis* (Hymenoptera: Formicidae) – Evaluating mechanisms for high abundance. BIOTROPICA **46**(2):229-237.
51. **Tsutsui, N. D.** 2013. Dissecting ant recognition systems in the age of genomics. BIOLOGY LETTERS **9**:20130416.
50. Lewis V., Moore, S., Tabuchi, R., Sutherland, A., Choe, D.-H. and **N. D. Tsutsui** 2013. Researchers combat the resurgence of bed bug in behavioral studies and monitor trials. CALIFORNIA AGRICULTURE **67**:172-178.
49. Simola, D. F., Wissler, L., Donahue, G., Waterhouse, R.M., Helmkampf, M., Roux, J., Nygaard, S., Glastad, K.M., Hagen, D.E., Viljakainen, L., Reese, J.T., Hunt, B.G., Graur, D., Elhaik, E., Kriventseva, E.V., Wen, J., Parker, B.J., Cash, E., Privman, E., Childers, C.P., Muñoz-Torres, M.C., Boomsma, J.J., Bornberg-Bauer, E., Currie, C., Elsik, C.G., Suen, G., Goodisman, M.A.D., Keller, L., Liebig, J., Rawls, A., Reinberg, D., Smith, C.D., Smith, C.R., **Tsutsui, N.**, Wurm, Y., Zdobnov, E.M., Berger, S.L. and J. Gadau. 2013. Social insect genomes exhibit dramatic evolution in gene composition and regulation while preserving regulatory features linked to sociality. GENOME RESEARCH **23**:1235-1247.
48. Emery, V. J. and **N. D. Tsutsui.** 2013. Recognition in a social symbiosis: Chemical phenotypes and nestmate recognition behaviors of Neotropical parabiotic ants. PLOS ONE **8**(2): e56492.
47. Choe, D.-H., D. B. Villafuerte and **N. D. Tsutsui.** 2012. Trail pheromones of the Argentine ant, *Linepithema humile* (Mayr) (Hymenoptera: Formicidae). PLOS ONE **7**(9):e45016.
46. Johnson, B. R., E. van Wilgenburg, and **N. D. Tsutsui.** 2012. Nestmate recognition in social insects is sometimes more complex than an individual based decision to accept or reject (Commentary). BEHAVIORAL ECOLOGY AND SOCIOBIOLOGY **66**:343-346.
45. Choe, D.-H., S. R. Ramírez and **N. D. Tsutsui.** 2012. A silica gel-based method for extracting insect surface hydrocarbons. JOURNAL OF CHEMICAL ECOLOGY. DOI 10.1007/s10886-012-0074-1.
44. Ramírez, S. R., T. Eltz, M. K. Fujiwara, G. Gerlach, B. Goldman-Huertas, **N. D. Tsutsui** and N. E. Pierce. 2011. Asynchronous diversification in a specialized plant-pollinator mutualism. SCIENCE. **333**: 1742-1746.
43. van Wilgenburg, E., A. Felden, D.-H. Choe, R. Sulc, J. Luo, K. J. Shea, M. A. Elgar and **N. D. Tsutsui.** 2011. Learning and discrimination of cuticular hydrocarbons in a social insect. BIOLOGY LETTERS.
42. Smith, C. R., A. V. Suarez, **N. D. Tsutsui,** S. E. Wittman, B. Edmonds, A. Freauff, and C. V. Tillberg. 2011. Nutritional asymmetries are related to division of labor in a queenless ant. PLOS ONE **6**:e24011.
41. Johnson, B. R. and **N. D. Tsutsui.** 2011. Taxonomically restricted genes are associated with the evolution of sociality in the honey bee. BMC GENETICS **12**:164.
40. Abbot, P. *et al.* 2011. Inclusive fitness theory and eusociality. NATURE **466**:1057-1062. (Brief communications arising).
39. Suen, G., *et al.* 2011. The genome sequence of the leaf-cutter ant, *Atta cephalotes*, reveals insights into its obligate symbiotic lifestyle. PLOS GENETICS **7**:e1002007.

38. Smith, C. R., *et al.* 2011. A draft genome of the red harvester ant, *Pogonomyrmex barbatus*: a model for reproductive division of labor and social complexity. PROCEEDINGS OF THE NATIONAL ACADEMY OF SCIENCES, USA **108**:5667-5672.
37. Smith, C. D., *et al.* 2011. The draft genome of the globally widespread and invasive Argentine ant (*Linepithema humile*). PROCEEDINGS OF THE NATIONAL ACADEMY OF SCIENCES, USA **108**:5673-5678. * **N. D. Tsutsui** – corresponding author.
36. Johnson, B. R., E. van Wilgenburg, and **N. D. Tsutsui**. 2011. Nestmate recognition in social insects: overcoming physiological constraints with collective decision making. BEHAVIORAL ECOLOGY AND SOCIOBIOLOGY **65**:935-944.
35. Franks, S. J., P. D. Pratt, and **N. D. Tsutsui**. 2010. The genetic consequences of a demographic bottleneck in an introduced biological control insect. CONSERVATION GENETICS **12**:201-211.
34. Ramírez, S. R., T. Eltz, F. Fritsch, R. Pemberton, E. G. Pringle, and **N. D. Tsutsui**. 2010. Intraspecific geographic variation of fragrances acquired by orchid bees in native and introduced populations. JOURNAL OF CHEMICAL ECOLOGY **36**:873-884.
33. van Wilgenburg, E., R. Sulc, K. J. Shea, and **N. D. Tsutsui**. 2010. Deciphering the chemical basis of nestmate recognition. JOURNAL OF CHEMICAL ECOLOGY **36**:751-758.
32. Marsico, T. D., J. W. Burt, E. K. Espeland, G. Gilchrist, M. A. Jamieson, L. Lindstrom, S. Swope, G. Roderick, M. Szucs and **N. D. Tsutsui**. 2010. Underutilized resources for studying the evolution of invasive species during their introduction, establishment and lag phases. EVOLUTIONARY APPLICATIONS **3**:203-219.
31. Vanderhoeven, S., C. Brown, C. Tepolt, **N. D. Tsutsui**, V. Vanparys, S. Atkinson, G. Mahy and A. Monty. 2010. Linking concepts in invasion biology: Network analysis shows what has been studied most and helps identification of knowledge gaps. EVOLUTIONARY APPLICATIONS **3**:193-202.
30. van Wilgenburg, E., C. W. Torres and **N. D. Tsutsui**. 2010. The global expansion of a single ant supercolony. EVOLUTIONARY APPLICATIONS **3**:136-143.
29. Suarez, A. V., T. McGlynn and **N. D. Tsutsui**. 2010. Biogeographic patterns of invasive species. In: Lach, L., C. Parr, and K. Abbott, eds., ANT ECOLOGY, pp. 233-244 (Peer-reviewed book chapter).
28. van Wilgenburg, E., J. Clémencet and **N. D. Tsutsui**. 2010. Experience influences aggressive behaviour in the Argentine ant. BIOLOGY LETTERS **6**:152-155.
27. Brandt, M., E. van Wilgenburg, R. Sulc, K. J. Shea and **N. D. Tsutsui**. 2009. The scent of supercolonies: The discovery, synthesis and behavioral verification of ant colony recognition cues. BMC BIOLOGY **7**:71.
26. Brandt, M., E. van Wilgenburg, and **N. D. Tsutsui**. 2009. Global-scale analyses of chemical ecology and population genetics in the invasive Argentine ant. MOLECULAR ECOLOGY **18**:997-1005.
25. Cooper, M. L., K. M. Daane, E. H. Nelson, L. G. Varela, M. C. Battany, **N. D. Tsutsui**, and M. K. Rust. 2008. Liquid baits manage Argentine ants in coastal vineyards. CALIFORNIA AGRICULTURE **62**:177-183. (Peer-reviewed extension article).
24. Spagna, J. C., A. I. Vakis, S. N. Patek, X. Zhang, C. Schmidt, **N. D. Tsutsui**, and A. V. Suarez. 2008. Phylogeny, scaling, and the generation of extreme forces in trap-jaw ants. JOURNAL OF EXPERIMENTAL BIOLOGY **211**:2358-2368.
23. Suarez, A. V., D. A. Holway and **N. D. Tsutsui**. 2008. Genetics and behavior of a colonizing species: The invasive Argentine ant. AMERICAN NATURALIST **172**:S72-S84.
22. Calcaterra, L. A., Delgado, A. and **N. D. Tsutsui**. 2008. Activity patterns and parasitism rates of fire ant decapitating flies (Diptera: Phoridae: *Pseudacteon* spp.) in their native Argentina. ANNALS OF THE ENTOMOLOGICAL SOCIETY OF AMERICA **101**:539-550.
21. **Tsutsui, N. D.**, A. V. Suarez, Spagna, J. C. and J. S. Johnston. 2008. The evolution of genome size in ants. BMC EVOLUTIONARY BIOLOGY **8**:64.
20. Suarez, A. V.* and **N. D. Tsutsui***. 2008. The evolutionary consequences of biological invasions. MOLECULAR ECOLOGY **17**:351-360. *these authors contributed equally.

19. Torres, C. W.*, M. Brandt and **N. D. Tsutsui**. 2007. The role of cuticular hydrocarbons as chemical cues for nestmate recognition in the invasive Argentine ant (*Linepithema humile*). *INSECTES SOCIAUX* **54**:363-373. *undergraduate co-author.
18. Calcaterra, L. A., R. Vander Meer, J. P. Pitts, J. P. Livore, and **N. D. Tsutsui**. 2007. Survey of *Solenopsis* fire ants and their parasitoid flies (Diptera: Phoridae: *Pseudacteon*) in central Chile and central western Argentina. *ANNALS OF THE ENTOMOLOGICAL SOCIETY OF AMERICA* **100**:512-521.
17. Thomas, M. L., C. M. Payne-Makrisa, A. V. Suarez, **N. D. Tsutsui**, and D. A. Holway. 2007. Contact between supercolonies elevates aggression in Argentine ants. *INSECTES SOCIAUX* **54**: 225-233.
16. Thomas, M., C. M. Payne-Makrisa, A. V. Suarez, **N. D. Tsutsui**, and D. A. Holway. 2006. When supercolonies collide: Territorial aggression in an invasive and unicolonial social insect. *MOLECULAR ECOLOGY* **15**:4303-4315.
15. The Honeybee Genome Sequencing Consortium. 2006. Insights into social insects from the genome of the honeybee *Apis mellifera*. *NATURE* **443**:931-949.
14. Whitfield, C. W., S. K. Behura, S. H. Berlocher, A. G. Clark, S. Johnston, W. S. Sheppard, D. Smith, A. V. Suarez, D. Weaver, and **N. D. Tsutsui**. 2006. Thrice out of Africa: Ancient and recent expansions of the honey bee, *Apis mellifera*. *SCIENCE* **314**:642-645.
13. Thomas, M., **N. D. Tsutsui**, and D. A. Holway. 2005. Intraspecific competition influences the symmetry and intensity of aggression in the invasive Argentine ant. *BEHAVIORAL ECOLOGY* **16**:672-481.
12. **Tsutsui, N. D.** 2004. Scents of self: The expression component of self/non-self recognition systems. *ANNALES ZOOLOGICI FENNICI* **41**:713-727.
11. Suarez, A. V. and **N. D. Tsutsui**. 2004. The value of museum collections for research and society. *BIOSCIENCE* **54**:66-74.
10. **Tsutsui, N. D.**, S. N. Kauppinen*, A. F. Oyafuso*, and R. K. Grosberg. 2003b. The distribution and evolutionary history of *Wolbachia* infection in native and introduced populations of the invasive Argentine ant (*Linepithema humile*). *MOLECULAR ECOLOGY* **12**:3057-3068. *undergraduate co-author.
9. **Tsutsui, N. D.** and A. V. Suarez. 2003. The colony structure and population biology of invasive ants. *CONSERVATION BIOLOGY* **17**:48-58.
8. **Tsutsui, N. D.**, A. V. Suarez, and R. K. Grosberg. 2003a. Genetic diversity, asymmetrical aggression, and recognition in a widespread invasive species. *PROCEEDINGS OF THE NATIONAL ACADEMY OF SCIENCES, USA* **100**:1078-1083.
7. Suarez, A. V., D. A. Holway, D. Liang, **N. D. Tsutsui**, and T. J. Case. 2002. Spatio-temporal patterns of intraspecific aggression in the invasive Argentine ant. *ANIMAL BEHAVIOUR* **64**:697-708.
6. Holway, D. A., L. Lach, A. V. Suarez, **N. D. Tsutsui**, and T. J. Case. 2002. The ecological causes and consequences of ant invasions. *ANNUAL REVIEW OF ECOLOGY AND SYSTEMATICS* **33**:181-233.
5. Suarez, A. V., M. Benard, **N. D. Tsutsui**, T. A. Blackledge, K. Copren, E. M. Sarnat, A. L. Wild, W. M. Getz, P. T. Starks, K. Will, P. J. Palsboll, M. E. Hauber, C. Moritz, and A. D. Richman. 2002. Conflicts around a study of Mexican crops. *NATURE* **417**:897. (Correspondence).
4. **Tsutsui, N. D.**, A. V. Suarez, D. A. Holway, and T. J. Case. 2001. Relationships among native and introduced populations of the Argentine ant, *Linepithema humile* and the source of introduced populations. *MOLECULAR ECOLOGY* **10**:2151-2161.
3. **Tsutsui, N. D.** and T. J. Case. 2001. Population genetics and colony structure of the Argentine ant (*Linepithema humile*) in its native and introduced ranges. *EVOLUTION* **55**:976-985.
2. **Tsutsui, N. D.**, A. V. Suarez, D. A. Holway and T. J. Case. 2000. Reduced genetic variation and the success of an invasive species. *PROCEEDINGS OF THE NATIONAL ACADEMY OF SCIENCES, USA* **97**:5948-5953.

Tsutsui, Neil D.
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1. Suarez, A. V., **N. D. Tsutsui**, D. A. Holway and T.J. Case. 1999. Behavioral and genetic differentiation between native and introduced populations of the Argentine ant. *BIOLOGICAL INVASIONS* **1**:43-53.

GRANT SUPPORT

- NATIONAL SCIENCE FOUNDATION LONG-TERM RESEARCH IN ENVIRONMENTAL BIOLOGY (LTREB), (co-PI). “LTREB Collaborative Proposal: Large-scale removal of introduced ants as a test of community reassembly”. 4/1/2017-3/31/2022. **\$391,313** (Tsutsui share: **\$177,548**).
- NATIONAL SCIENCE FOUNDATION, IOS-SDS, (B. Fisher, co-PI), “Collaborative Research: Scents of Self: How Trade-offs Shape Self/Non-self Recognition Cues in a Supercolonial Insect” (ranked #1 in panel). February 2016 – January 2020. **\$830,933**.
- UNITED STATES DEPARTMENT OF AGRICULTURE, NIFA-AFRI. “Using Functional Genomics to Link Behavior, Chemical Ecology and Chemoreception in a Widespread and Damaging Agricultural Pest” February 2016 – January 2019. **\$498,083**.
- UC BERKELEY BAKAR FELLOW, “Deploying Insect Pheromones to Control a Widespread and Damaging Insect”, July 2012 – June 2017. **\$250,000**.
- UCMEXUS, (K. Mathis, co-PI), “Host Selection and Successful Parasitism of the Aggressive Arboreal Ant *Azteca instabilis* by Decapitating Phorid Flies (Genus: *Pseudacteon*) in Dynamic Coffee Agroecosystems”, January 2012 – December 2013. **\$11,852**.
- GORDON AND BETTY MOORE FOUNDATION, “Using Genomics, Isotopes and Pollen to Illuminate the Past and Predict the Future of California Bees”, November 2011 – October 2014. **\$379,339**.
- CALIFORNIA STRUCTURAL PEST CONTROL BOARD, DEPARTMENT OF PESTICIDE REGULATION, “Bedbug detection using airborne pheromone cues”. February 2011 – February 2012. **\$116,650**.
- DEFINING WISDOM, sponsored by the University of Chicago Arete Initiative and the John Templeton Foundation. “The Wisdom of the Ant: The Role of Experience in Sociality and Aggression”. October 2008 – September 2010. **\$100,000**.
- UNITED STATES DEPARTMENT OF AGRICULTURE, NRI-CSREES 2008-35302-04680. “An Integrative Analysis of Altered Social Behavior in the Invasive Argentine Ant (*Linepithema humile*)”. (ranked #8 of 83). September 2008 – August 2011. **\$425,000**.
- COMMITTEE ON RESEARCH, FACULTY RESEARCH GRANT (UC-BERKELEY), “A preliminary analysis of candidate genes for aggression in the invasive Argentine ant”. 2007 – 2008. **\$5,000**.
- AUSTRALIAN RESEARCH COUNCIL, “Sociality and a sense of smell: Receptor organ evolution in ants”. (PI: Mark A. Elgar, University of Melbourne). 2008 – 2010. **\$225,000**.
- STRUCTURAL PEST CONTROL BOARD, CALIFORNIA DEPARTMENT OF CONSUMER AFFAIRS, “The Role of Genetics and Cuticular Hydrocarbons in Argentine ant Aggression”. (Co-Investigator: Ken Shea, UC-Irvine, Department of Chemistry). September 2005 – August 2008. **\$312,037**.
- UNITED STATES DEPARTMENT OF AGRICULTURE, NRI-CSREES 2004-35302-14865. “The Genetic and Biochemical Basis of Altered Social Behavior in the Invasive Argentine ant (*Linepithema humile*)” (ranked #2 of 117). September 2004 – August 2007. **\$325,000**.

TEACHING EXPERIENCE, AWARDS & MENTORSHIP

GRADUATE STUDENTS ADVISED:

Candice Torres (Ph.D.; 2005–2012)	Virginia Emery (Ph.D.; 2009–2013)
Rebecca Sandidge (Ph.D.; 2008–present)	Tara Madsen-Steigmeyer (Ph.D.; 2011–2014)
Kaitlyn Mathis (Ph.D.; 2009–2015)	Maria Tonione (Ph.D.; 2012–present)
Kelsey Scheckel (Ph.D.; 2014–present)	Brian Whyte (Ph.D.; 2015–present)

POST-DOCTORAL RESEARCHERS ADVISED:

Dr. Megan McPhee (2003–2005)	Dr. Miriam Brandt (2005–2007)
Dr. Johanna Clemencet (2006–2007)	Dr. Ellen van Wilgenburg (2006–2010)
Dr. Dong-Hwan Choe (2009–2011)	Dr. Brian Johnson (2009–2011)
Dr. Santiago Ramirez (2008–2013)	Dr. Kaustubh Gokhale (2014–2016)
Dr. Jan Buellesbach (2016–present)	Dr. Elizabeth Cash (2016–present)
Dr. Joshua Gibson (2016–present)	

GRADUATE COMMITTEE MEMBER

Valerie Foster (UCI; Ph.D.; 2004–2006), Nan Wang (UCI; M.S.; 2005–2006), Jesse Hollister (UCI; Ph.D.; 2006), Steven Lockton (UCI; Ph.D.; 2004–2007), Diane Livio (UCI; M.S.; 2005–2007), Felipe Barreto (UCI; Ph.D.; 2006–2007), Rosemary Byrne (UCI; Ph.D.; 2006–2007), June Gwalthney (UCI; Ph.D.; 2006–2007), Shauna Price (UCLA; Ph.D.; orals committee; 2007), Nicole VanderSal (UCB; Ph.D.; 2007–2008), Michael Branstetter (UCD; Ph.D., orals committee; 2007), Alexandra Harmon-Threatt (UCB; Ph.D.; 2009–2011), Cause Hanna (UCB; Ph.D.; Chair–orals committee; 2007–2012), Caroline Lee (UCB, Integrative Biology; Ph.D; 2008, orals committee), Lisa Fernandez (UCB; Ph.D.; 2008–present), Steven Bayes (UCB; Ph.D.; 2008–2014), Julie Hopper (UCB; Ph.D.; 2008–2015), Joseph Sapp (UCSC; Ph.D.; 2009–present), Misha Leong (UCB; Ph.D.; orals committee), Jeremy Anderson (UCB; Ph.D; 2010–present), Traci Grzymala (UCB; Ph.D.; orals committee), Kelly Schiabor (UCB; Ph.D; Molecular & Cell Biology; 2011–2015), Robert Thistle (UCB; Ph.D; Molecular & Cell Biology; 2011–2014), Sara Emery (UCB; Ph.D.; Chair–orals committee; 2012), Samantha Cheung (UCB; Ph.D; Molecular & Cell Biology; 2012–2016), Anne Murray (UCB; Ph.D.; Chair–orals committee; 2012), Kevi Mace (UCB; Ph.D.; Chair–orals committee; 2012), Carolyn Elya (UCB; Ph.D; Molecular & Cell Biology; 2013–present), Ting-ting “Dana” Lin (UCB, Integrative Biology; Ph.D; 2014, orals committee), Allison Quan (UCB; Ph.D; Molecular & Cell Biology; 2014–present), Celia Del Cid (UCB; Ph.D.; orals committee; 2014–15), Ignacio Escalante (UCB; Ph.D.; guiding committee, Chair–orals committee; 2014–present), Maggi Raboin (UCB; guiding committee, Chair–orals committee; 2015–present).

UNDERGRADUATES MENTORED:

~100 since 2003.

COURSES TAUGHT & TEACHING AWARDS:

UC-Berkeley

Environmental Science Forum (ESPM 201C), Spring 2008.
Insect Behavior (ESPM150, ESPM142), each Fall 2008-2012; 2015, 2016.
Genetics and Genomics of Insect Behavior (ESPM290), Spring 2009.
Senior Seminar-Conservation & Resource Studies (ESPM194), Spring 2011 (two classes), Spring 2012.
Insect Chemoreception and Chemical Ecology (ESPM290), Spring 2014.
Advanced Chemical Ecology (ESPM290), Fall 2014, 2016.
Molecular Approaches to Environmental Problem Solving (ESPM 192), Spring 2015, 2016.

UC-Irvine

Graduate Core in Evolution, Winter 2007.
Advanced Evolutionary Biology (BS168), Spring 2004, 2005, 2006.
Freshman Seminar (BS2B), “Social behavior of ants”, Spring 2004, 2005, 2006, 2007.
Faculty Appreciation Award – Alpha Epsilon Delta (AED) Pre-Medical Honor Society, Spring 2006.

GUEST LECTURES:

Tsutsui, Neil D.
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UC-Irvine Graduate Core in Evolution, “Sociality, symbiosis, and the major evolutionary transitions”, Winter 2004, 2005, 2006.

UC-Irvine Graduate Core in Ecology, “The ecology and behavior of invasive species”, Spring 2004, 2005.

Entomology (BS184), “Cooperation and conflict in social insects”, Spring 2004, Fall 2006.

Insect Ecology (ESPM113), “Cooperation, conflict and communication in social insects”, Spring 2008.

General Entomology (ESPM140), “Chemical ecology and genetics of social insects”, Spring 2008.

INVITED PRESENTATIONS & PROFESSIONAL MEETINGS

1999:

Invited speaker – Argentine ant symposium, Palo Alto, CA, May.

Speaker – Soc. for the Study of Evolution/American Soc. of Naturalists, Madison, WI. July.

Speaker – California Population & Evolutionary Genetics meeting (CALPEG), Bodega Bay, CA. December.

2000:

Seminar speaker – Center for Population Biology, Department of Evolution and Ecology, UC-Davis. March.

2001:

Speaker – Soc. for the Study of Evolution/American Soc. of Naturalists, Knoxville, TN. June.

Invited symposium speaker – Soc. for Conservation Biology, Hilo, HI. Symposium on: “Population biology of invasive species”. July.

2002:

Invited speaker – Department of Ecology & Evolutionary Biology, UC-Irvine. February.

Invited symposium speaker – International Union for the Study of Social Insects (IUSI), Sapporo, Japan. Symposium on: “Population Genetics and Genomics”. July/August.

Invited speaker – Molecular & Genetic Approaches in Ecology, UC-Davis, CA. October.

2003:

Speaker – Soc. for the Study of Evolution/American Soc. of Naturalists, Chico, CA. June.

Invited seminar speaker – Moss Landing Marine Laboratory, CA. November.

Speaker – California Population & Evolutionary Genetics (CALPEG), Irvine, CA. Dec.

2004:

Invited seminar speaker – Department of Biology, UC-Riverside, Riverside, CA. January.

Invited symposium speaker – Ecological Society of America, Portland, OR. Symposium on: “Evolution of invasive species”. August.

2005:

Invited speaker – Department of Biological Chemistry, UC-Irvine. January.

Invited seminar speaker – Behavior, Evolution & Culture Speaker Series, UC-Los Angeles, Los Angeles, CA. February.

Invited seminar speaker – Department of Evolution, Ecology & Organismal Biology, Ohio State University, Ohio. November.

2006:

Student-Invited speaker – 19th Annual Michael Duke Memorial Seminar Speaker. Department of Entomology, North Carolina State University. April.

Invited symposium speaker – International Union for the Study of Social Insects (IUSI), Washington, D.C. Symposium on: “Recognition Systems”. August.

Invited seminar speaker – Scripps Institute of Oceanography, UC-San Diego. November.

Invited seminar speaker – Department of Environmental Science, Policy & Management, UC-Berkeley. November.

2007:

Invited speaker – U.S. Department of Agriculture, Project Directors workshop. February.

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Invited seminar speaker – Department of Ecology & Evolutionary Biology, UC–Los Angeles. April.

Invited seminar speaker – Department of Ecology & Evolutionary Biology, University of Miami (Florida). April.

Invited seminar speaker – Quantitative and Systems Biology, UC-Merced. October.

Invited symposium speaker – Entomology Society of America, San Diego, CA. Symposium on “Connecting the Colony: Building Social Complexity through Pheromones”
December.

Poster presentation – U.S. Department of Agriculture, Project Directors workshop.
December.

2008:

Invited speaker – Entomology Society of America, Pacific Branch, Napa, CA. April.

Student-invited speaker – Program in Ecology, Evolution and Conservation Biology, University of Illinois, Urbana-Champaign. April.

Invited speaker – Defining Wisdom Symposium, John Templeton Foundation/University of Chicago, IL. August.

Invited seminar speaker – ESPM Colloquium, Department of Environmental Science, Policy & Management, UC–Berkeley. September.

Invited seminar speaker – Department of Entomology, UC–Davis. November.

2009:

Invited speaker – California Structural Pest Control Board, Napa, CA. January.

Invited speaker – The Past, Present and Future of Ant Genomics workshop and meeting, Tempe, AZ. January.

Invited speaker – Synthesis of the Ecology and Evolution of Invasive Species workshop and meeting, Lake Tahoe, CA. March.

Invited speaker – Defining Wisdom Symposium, John Templeton Foundation/University of Chicago, IL. June.

Invited symposium speaker – American Associate for the Advancement of Science (AAAS), San Francisco, CA. Symposium on “The Evolution of Cooperation”, August.

2010:

Poster presentation – U.S. Department of Agriculture, Project Directors workshop.
Washington, D.C. March.

Invited seminar speaker – Department of Entomology, UC–Riverside. May.

Invited speaker – Defining Wisdom Symposium, John Templeton Foundation/University of Chicago, IL. June.

Invited speaker – Pest Control Operators of California, combined district meeting. July.

Invited seminar speaker – Collaborative Learning at the Interface of Mathematics & Biology (CLIMB) program, UC–Davis. Sept.

Invited speaker – Meeting of the American Philosophical Society, Philadelphia, PA. Nov.

Poster presentation – U.S. Department of Agriculture, Project Directors workshop. San Diego, CA. Dec.

2011:

Invited speaker – Plant and Animal Genomes, San Diego, CA. Jan.

Invited speaker – Science@Cal, Dept. of Astronomy, UC Berkeley, CA. May.

Invited speaker – ESPM Colloquium, UC Berkeley, CA. November.

2012:

Invited speaker – California Structural Pest Control Board, Sacramento, CA. April.

Invited symposium speaker – Entomology Society of America, Knoxville TN, November.

Poster presentation – Entomology Society of America, Knoxville TN, November.

2013:

Invited speaker – California Structural Pest Control Board, Sacramento, CA. January.

Invited speaker – Entomology Society of America, Pacific Branch, Lake Tahoe, NV. April.

Invited seminar speaker – Department of Entomology, Texas A&M University, April.

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Invited conference speaker – Adapting to Global Change in the Mediterranean Hotspot, Seville, Spain. September.

Invited conference speaker –National Pest Management Association, Pestworld 2013. October.

2014:

Invited seminar speaker – Department of Entomology, UC–Davis. January.

Invited seminar speaker –Essig Brunch, Essig Museum of Entomology, UC Berkeley, April.

Invited speaker – Target Speciality Products, San Jose, CA. June.

Invited speaker – Target Speciality Products, Sacramento, CA. June.

Keynote speaker – PCOC Expo, Las Vegas, NV. June.

Invited speaker – Invasion Genetics: The Baker and Stebbins Legacy, Asilomar, CA. August.

Invited symposium speaker – Entomology Society of America, Portland, OR, November.

2015:

Invited speaker/panelist – Center for Population Biology mini-conference, UC–Davis. February.

Invited seminar speaker – PERT Program/Center for Insect Science, U of Arizona. March.

Invited speaker – Evolution of Organismality, St. Louis, MO. May.

Invited speaker – Target Speciality Products, Sante Fe Springs, CA. June.

Invited speaker – Target Speciality Products, San Marcos, CA. June.

2016:

Plenary speaker. American Association of IPM Entomologists, Monterey, CA. “The behavior and social structure of ants”, February.

Invited symposium speaker – International Congress of Entomology, Orlando, FL, September.

SERVICE

PANEL MEMBER:

NATIONAL SCIENCE FOUNDATION – IOB Behavioral Systems. 2011, 2013.

NATIONAL SCIENCE FOUNDATION – DEB Phylogeography. 2008.

NATIONAL SCIENCE FOUNDATION – Doctoral Dissertation Improvement Grants. 2007.

U.S. DEPARTMENT OF AGRICULTURE – Arthropod & Nematode Biology: Organismal & Population Biology. 2007, 2009.

U.S. DEPARTMENT OF AGRICULTURE – ARS, OSQR: Ants and Termites. 2009.

EDITORIAL BOARDS:

AUSTRALIAN JOURNAL OF ZOOLOGY. Associate Editor, 2007–2012.

BMC ECOLOGY. Associate Editor, 2011–present.

BIOLOGICAL INVASIONS. Associate Editor, 2011–present.

PLoS GENETICS. Guest Editor, 2013.

COMMITTEE MEMBER:

NATIONAL ECOLOGICAL OBSERVATORY NETWORK (NEON) DESIGN CONSORTIUM, Invasive Species subcommittee. 2004–2005.

REVIEWER (manuscripts and grant proposals, excluding panel service above):

>150 total from July 2003–present

Journals, including: *The American Naturalist*, *Animal Behaviour*, *Annals of the Entomological Society of America*, *Behavioral Ecology*, *Behavioral Ecology & Sociobiology*, *Biology Letters*, *BMC Ecology*, *Conservation Biology*, *Diversity & Distributions*, *Ecology*, *Ecology Letters*, *Evolution*, *Evolutionary Applications*, *Evolutionary Ecology Research*, *Genetics*, *Insectes Sociaux*, *Journal Chemical of Ecology*, *Naturwissenschaften*, *Molecular Ecology*, *Oecologia*, *PLoS One*, *Proceedings of the National Academy of Sciences*.

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Funding agencies, including: *The National Science Foundation, US Department of Agriculture, National Institute for Climate Change Research (US Dept of Energy), Natural Environment Research Council.*

SERVICE TO UC SYSTEM:

Member – Faculty advisory committee, UC Education Abroad Program (UCEAP). 2013–present.

SERVICE TO CAMPUS:

Member – Committee on Courses of Instruction (COCI). 2014–present.

- Sciences subcommittee. 2014–2015.
- Variances subcommittee. 2015–2016.
- Student Information Systems (SIS) advisory committee. 2016–present.

Member – Berkeley Institute for Global Change Biology. 2010–present.

Member – *Ad hoc* campus tenure review committee – 2010, 2014.

Member – Ecological Preserve and Open Space committee. 2006–2007 (UCI).

Member – Phi Beta Kappa nominating committee. 2004–2007 (UCI).

SERVICE TO SCHOOL/COLLEGE:

Faculty Judge – College of Natural Resources Gradfest Symposium. 2011.

Faculty Judge – College of Natural Resources Honor Symposium. 2010, 2015.

Member – Biological Sciences Executive Committee. Elected by department; 2006–2008 (UCI).

Member – Crystal Cove Research Cottage committee. 2005–2006 (UCI).

SERVICE TO THE DEPARTMENT:

Member – Race, Culture, and Environment search committee. 2016.

Vice Chair for Instruction. 2010–2012, 2014–2015.

Chair – Undergraduate Programs Committee. 2010–2012, 2014–2015.

Chair – *Ad hoc* personnel action committee. 2012, 2016.

Member – ESPM Departmental Vision committee. 2012.

Member – Molecular Environmental Biology undergraduate advising committee. 2008–present.

Member – Graduate student advising committee. 2008–present.

Member – Global Change Organismal Biology search committee. 2010.

Member – Environmental Science undergraduate major committee. 2008–2010.

Member – Environmental Science undergraduate major transition committee. 2010–2011.

Chair – ESPM Safety Committee. 2009.

Member – Graduate admissions committee. 2009–2010.

Member – *Ad hoc* tenure and merit review committees – 2 times since 2007.

Chair – Graduate student awards committee. 2007–2008.

Chair – Molecular Analytical Facility Steering committee. 2006–2007. (UCI)

Member – Ecology search committee. 2 positions; 2005–2006. (UCI)

Member – Departmental web-page committee. 2003–2007. (UCI)

Member – *Ad hoc* personnel merit review committee – 5 times since 2003. (UCI)

MEETING CO-ORGANIZER

California Population & Evolutionary Genetics meeting (CALPEG), December 2003.

OUTREACH

INVITED SCIENTIST:

Congressional Education Day on Invasive Species, Washington, D.C. May 2010.

SPEAKER:

UC–Irvine Minority Biomedical Research Support program. February 2004.

California Alliance for Minority Participation (CAMP) Summer Science Academy (lab tour). July 2004, July 2005.

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UC–Irvine, Teacher Professional Development program on Science Fair Projects as Tools for Investigation & Experimentation, School of Biological Sciences Outreach Program. August 2004.

UC–Irvine, Minority Graduate Research Conference in Biomedical Sciences. November 2005.

UC–Irvine, Minority Science Program, Theory & Research Seminar Series. May 2006, May 2007.

Girls, Inc., Eureka Day, UC–Irvine. July 2006.

NIH-Bridges to the Baccalaureate, UC–Irvine Minority Science Program, "Careers in Biomedical Sciences" (Santa Ana College). Faculty panel. October 2006.

UC President’s Post-doctoral Fellowship Program. Led workshop on “Grant writing in the sciences”. October 2009.

FACULTY MENTOR:

UC–Irvine, High School Science Fair Initiative, School of Biological Sciences Outreach Program (2004–2005).

REVIEWER:

Southern California Junior Science and Humanities Symposium. 2004, 2006.

UC–Irvine, Excellence in Research, Biological Sciences Symposium. 2004–2005.

VOLUNTEER:

Ask a Scientist Night, Irvine Unified School District, Oct. 2003.

PRESS:

Magazine: Nature–News and Views (**405**:519-520), Science–Editor’s Choice (288:1549), New Scientist (**166**:9), Science News (**157**:346; **161**:245), California Wild (**55**:4-5), California Agriculture (**56**:4), Conservation (Jan-Mar 2010), Discover Magazine (March 18, 2014), Wired Magazine (April 10, 2014), many others.

Newspaper: The New York Times (1 August 2000, Science Times p. D1), The Los Angeles Times (16 May 2000, p. A1; 15 Sept. 2006, p. B1), The San Francisco Chronicle (15 Sept. 2006; 28 October 2009), The Washington Post, National Geographic News (22 Sept. 2006), The Orange County Register (May 2000; 15 Sept. 2006), The San Diego Union-Tribune (10 Feb. 2003), The Sacramento Bee (26 June 2003, p. A3), Sacramento News and Review (27 Feb. 2003), many others.

Television: CNN Headline News, local affiliates of NBC, ABC, and FOX; KQED-Quest, KQED-Deep Look.

Radio: National Public Radio (“Radiolab”, “All Things Considered”), BBC World Service (“Science in Action”), Canadian Broadcasting Corporation (“Quirks and Quarks; As It Happens”), Earthwatch Radio, This Week in Science (KVDS).

Internet: Reddit (front page), Ars Technica, National Geographic News, Discovery online, The Environmental News Network, many others.

MEMBERSHIPS

MEMBER:

Phi Beta Kappa Honor Society. 1994–present.

Society for the Study of Evolution. 1997–2005.

American Society of Ichthyologists and Herpetologists. 1998–2000.

UC-Irvine, Institute for Genomics and Bioinformatics. 2003–2007.

Sigma Xi Honor Society. 2005–present.

Entomology Society of America. 2007–present.

American Association for the Advancement of Science. 2016-present.