SUBJECT: Appointment of a public representative to the AC Transit Retirement Board.

RECOMMENDED ACTION:

☐ Information Only  ☐ Briefing Item  ☒ Recommended Motion

Consider adoption of Resolution No. 2095 appointing a public member to the Alameda-Contra Costa Transit District Retirement Board to complete the unexpired term of Robert D. Young.

Fiscal Impact:
N/A

Background/Discussion:
Mr. Robert D. Young was appointed to serve a two-year term as a public representative on the AC Transit Retirement Board on March 6, 2003. The term for this appointment was from April 1, 2003 to March 31, 2005. In June of this year Mr. Young resigned from the Retirement Board due to health reasons.

BOARD ACTION: Approved as Recommended [X] Other [ ]
Approved with Modification(s) [ ]

MOTION: KAPLAN/WALLACE to adopt Resolution No. 2095 approving the appointment of Jeffrey Lewis to the AC Transit Retirement Board (6-0-0-1).

Ayes: Director Kaplan, Vice President Wallace, Directors Jaquez, Bischofberger, Peeples, President Piras – 6
Noes: None – 0
Abstain: None – 0
Absent: Director Harper - 1

The above order was passed on September 17, 2003.

Rose Martinez, District Secretary
By ___________________________
On July 2, 2003, the Board reviewed three applications submitted from the March 2003 recruitment. The Board decided not to select Mr. Young’s replacement from these candidates and directed staff to notice the vacancy and do a new and more extensive recruitment.

Notices and application forms were distributed to the general public, local community colleges and universities. News releases were sent to the Oakland Tribune, Hayward Daily Review, Chinese Times, Contra Costa Times and El Mundo. The notice also was posted on the AC Transit web site. The deadline for receipt of applications was 12:00 noon on Friday, September 12, 2003.

On September 3, 2003, the Board appointed a Screening Committee to screen the applications and select three candidates to be interviewed by the Board. The interviews were scheduled for Wednesday, September 17, 2003, just prior to the 2:00 p.m. Board meeting. The Board is requested to consider appointing a candidate from the following candidates submitted for consideration by the Screening Committee.

- Jeffrey Lewis
- Pamela Yetunde
- Alex E. Esparza

Prior Relevant Board Actions/Policies:

Ordinance No. 10 establishing the process for making appointments to the AC Transit Retirement Board.

Attachments:

Resolution No. 2095
Applications

Prepared by: Rose Martinez, District Secretary
Date Prepared: September 9, 2003
ALAMEDA-CONTRA COSTA TRANSIT DISTRICT

RESOLUTION NO. 2095

A RESOLUTION APPOINTING _____________ AS A PUBLIC MEMBER
to the ALAMEDA-CONTRA COSTA TRANSIT DISTRICT RETIREMENT
BOARD TO COMPLETE THE UNEXPIRED TERM OF
MR. ROBERT D. YOUNG

WHEREAS, the Alameda-Contra Costa Transit District Board of Directors
(the District) is authorized by Public Utilities Code Sections 25301 and 25361 to
establish a retirement system and a retirement board; and

WHEREAS, the District has created a retirement system and a five
member Retirement Board; and

WHEREAS, on March 6, 2003, the Board adopted Resolution No. 2084,
appointing Mr. Robert D. Young to a two (2) year term as a public representative
on the AC Transit Retirement Board, said term commencing on April 1, 2002 and
expiring on March 31, 2005; and

WHEREAS, on June 2, 2003, Mr. Robert D. Young submitted a letter of
resignation from the Retirement Board to the Retirement System Administrator;
and

WHEREAS, the AC Transit Board of Directors on September 17, 2003
interviewed ___ candidates for this recruitment.

NOW, THEREFORE, the Alameda-Contra Costa Transit District Board of
Directors does resolve as follows:

SECTION 1. Appoints _____________ as a public member of the
Alameda-Contra Costa Transit District Retirement Board to complete the
unexpired term of Mr. Robert D. Young. _____________'s terms commences
upon the adoption of this resolution and will expire on March 31, 2005.

SECTION 2. This resolution shall become effective immediately upon its
passage by four affirmative votes of the Board of Directors.

RESOLUTION NO. 2095 WAS PASSED AND ADOPTED this 17th day of
September 2003.

Patrisha Piras, President
Attest:

Rose Martinez, District Secretary

I, Rose Martinez, District Secretary for the Alameda-Contra Costa Transit District, certify that the foregoing Resolution was passed and adopted at a Special-Regular Meeting of the Board of Directors held on the 17th day of September 2003, by the following roll call vote:

AYES: DIRECTORS:
NOES: DIRECTORS:
ABSENT: DIRECTORS:
ABSTAIN: DIRECTORS:

Rose Martinez, District Secretary

Approved as to form:

Kenneth C. Scheidig, General Counsel
APPLICATION FOR APPOINTMENT  
TO THE AC TRANSIT DISTRICT RETIREMENT BOARD

NAME: Jeffrey Lewis

RESIDENCE ADDRESS: 2 Vista Del Moraga Orinda 94563
Number Street City Zip Code

MAILING ADDRESS, if different:

TELEPHONE: (510) 839-6824 Ext. ( )

FAX: (510) 839-7839 EMAIL: jlewis@lewisfeinberg.com

Responses to the following may be provided in the space below or on an attached sheet.

1. I am interested in serving on the AC Transit District Retirement Board because:

   a. I have spent the past 27 years—my entire working career—providing advice to and representing employees, employers, and employee benefit plan fiduciaries (such as Board members) on virtually every aspect of employee benefit plans. I would welcome the opportunity to serve in a non-attorney capacity as a fiduciary of a plan.

   b. I have lived in Alameda and Contra Costa Counties for all but two of the past 31 years, and I have maintained an office in Oakland for the past 24 years. I have used AC Transit over the years, as have my employees, family members, and friends, and I have a strong interest in making sure that the retirement benefits of the dedicated District employees are protected and fairly administered and that the District's plan is operated on a fiscally responsible and efficient basis.

2. I will bring the following insights, knowledge, experience, and/or educational background to the Retirement Board:

   See attached resume.

   During my entire working career as an attorney, I have continually engaged in the following activities: (a) reviewing, interpreting, drafting, and litigating disputes regarding the interpretation of retirement plan provisions; (b) evaluating the work of individuals and entities who provide services to employee benefit plans (including but not limited to actuaries, attorneys, and investment advisors), advising fiduciaries and attorneys about the selection and monitoring of such service providers, and litigating issues regarding the selection, monitoring, and performance of such providers; (c) reviewing actuarial reports and issues, working with actuaries, and occasionally litigating issues regarding actuaries' work for employee benefit plans; (d) analyzing plan fiduciaries' conduct in the setting of investment strategies, policies, and guidelines, advising fiduciaries regarding that conduct, and litigating issues regarding that conduct; (e) analyzing and litigating issues regarding individuals' disability status.

August 12, 2003
3. I will bring the following specific areas of interest to the Retirement Board:

I am interested in the Board's work in all of the areas discussed in No. 2, above.

4. Relevant community groups and activities in which I am involved include:

American Bar Association, Employee Benefits Committee of the Labor and Employment Section – former Co-chair and currently active member; regular speaker at educational programs regarding employee benefit plans.

Alternative Dispute Resolution Program, United States District Court, Northern District of California – service as court-appointed mediator, primarily in employee benefit plan lawsuits.

5. Other information that I believe is important for the District Board to consider when reviewing my application includes:

UNDER CALIFORNIA'S PUBLIC RECORDS ACT, YOUR COMPLETED APPLICATION FORM WILL BE A PUBLIC DOCUMENT.

SIGNED APPLICATION, TOGETHER WITH A RESUME, MUST BE RECEIVED NO LATER THAN 12:00 NOON ON FRIDAY, SEPTEMBER 12, 2003.

Mail or fax to: District Secretary, AC Transit, 1600 Franklin Street, Oakland 94612
(510) 891-4705

Signature

Date September 12, 2003
RESUME

JEFFREY LEWIS

Jeffrey Lewis is a shareholder in the firm of Lewis & Feinberg, P.C. (formerly Sigman, Lewis & Feinberg, P.C.). He has specialized in pension and employee benefit law since 1975. Mr. Lewis also serves as a Mediator and Early Neutral Evaluator for the U.S. District Court for the Northern District of California and privately.

Mr. Lewis' legal work involves a broad spectrum of employee benefit questions, including ERISA preemption of state laws, fiduciary standards, service-provider malpractice, benefit entitlement, reporting and disclosure requirements, plan terminations, and other ERISA and related labor law and state law issues. He and the six-attorney firm are presently litigating employee benefit law actions in federal courts in California, Oregon, Colorado, Delaware, Pennsylvania, New York, Kentucky, Connecticut, Illinois, and the District of Columbia. Mr. Lewis and the firm also advise fiduciaries, employers, and unions on an ongoing basis with regard to employee benefit plans and issues.

Professional Recognition

Mr. Lewis recently completed a three-year term as one of the Co-Chairs of the Employee Benefits Committee of the Labor and Employment Section of the American Bar Association.

He was selected as a member of the College of Labor and Employment Lawyers and a charter fellow of the American College of Employee Benefits Counsel. Mr. Lewis has testified before Congressional committees regarding pension issues. He was named as one of the top 40 employee benefits attorneys in the country by the National Law Journal.
Law School Teaching

1998, 1999: Adjunct Professor, Hastings College of Law -- "Pension/Employee Benefit Law"

1983, 1984 & 1986: Adjunct Professor, University of San Francisco School of Law -- "Pension Funds and Employee Benefits"

1983: Lecturer, Golden Gate University Law School -- "Employee Retirement Law"

Programs and Publications

Editor:

Board of Senior Editors, Employee Benefits Law (BNA), publication written by the American Bar Association, Employee Benefits Committee of the Labor and Employment Section. Co-senior editor, chapters on Fiduciary Responsibility and Preemption.

Editor, ERISA chapter in Employee Rights Litigation: Pleading and Practice (Matthew Bender).

Contributing editor, employee benefits, for The Court TV Cradle-to-Grave Legal Survival Guide (Little, Brown and Company)


Seminar Faculty Member:

Mr. Lewis is a regular speaker on such subjects as fiduciary duty, fiduciary duty litigation, preemption, and legal ethics at the annual "ERISA Litigation: Tactics and Strategy" conferences sponsored by the American Bar Association. He is also a regular speaker at the annual ABA "ERISA Basics" conference. Other recent presentations on ERISA-related matters included presentations at the American Bar Association's 2002 and 2003 Annual Meetings, a presentation at the American Association of Law Schools' January, 2001 national convention, moderating and speaking at several programs at the 2001, 2000, and 1999 American Bar Association Annual Meetings, speaking on ERISA at a March 1995 conference sponsored by the Employee Benefits Institute and the University of Missouri-Kansas City School of Law, a September 1992 conference sponsored by the National Health Lawyers Association, and a September 1991 conference on liability of plan service providers (e.g., actuaries, auditors, attorneys) sponsored by the International Foundation of Employee Benefit Plans. He has also spoken on ERISA topics on a number of occasions at the Glasser Legal Works Annual ERISA Litigation Conference.

Other Professional Activities

Mediator and Early Neutral Evaluator for U.S. District Court, Northern District of California.

Past Co-Chair, Fiduciary Responsibility subcommittee of the American Bar Association Employee Benefits Committee.

Past Co-Chair, Pension Committee, National Employment Lawyers Association.

Member, Lawyers Advisory Committee, National Pension Assistance Project.

Bar Admissions

State Bar of California
U.S. District Courts --

Northern District of California, Eastern District of California, Central District of California, Southern District of California.

U.S. Court of Appeals --

Ninth Circuit
Second Circuit
Tenth Circuit
Third Circuit

U.S. Supreme Court

Education

J.D., 1975, Boalt Hall (University of California, Berkeley), Order of the Coif

B.A., 1970, Yale University.
APPLICATION FOR APPOINTMENT
TO THE AC TRANSIT DISTRICT RETIREMENT BOARD

NAME: Pamela Ayo Yetunde

RESIDENCE ADDRESS: 40 Maiden Lane Oakland 94602

MAILING ADDRESS, if different:

TELEPHONE: (510) 482-4593 Ext. ( )

FAX: ( ) (same as phone) EMAIL: PayB@mindworks.com

Responses to the following may be provided in the space below or on an attached sheet.

1. I am interested in serving on the AC Transit District Retirement Board because:

2. I will bring the following insights, knowledge, experience, and/or educational background to the Retirement Board:

3. I will bring the following specific areas of interest to the Retirement Board:

4. Relevant community groups and activities in which I am involved include:

5. Other information that I believe is important for the District Board to consider when reviewing my application includes:

UNDER CALIFORNIA'S PUBLIC RECORDS ACT, YOUR COMPLETED APPLICATION FORM WILL BE A PUBLIC DOCUMENT.

SIGNED APPLICATION, TOGETHER WITH A RESUME, MUST BE RECEIVED NO LATER THAN 12:00 NOON ON FRIDAY, SEPTEMBER 12, 2003.
Mail or fax to: District Secretary, AC Transit, 1600 Franklin Street, Oakland 94612 (510) 891-4705

Signature Pamela Ayo Yetunde Date 9/1/03

August 11, 2003
Application Addendum for
Appointment to the AC Transit District Retirement Board

1. I am interested in serving on the AC Transit District Retirement Board because:

I possess a history of volunteerism and a present commitment to volunteer work, dating back to 1984. My volunteer experiences include:

a. Student Voluntary Services at Ball State University, 1984
b. Operation Crossroads Africa, Zimbabwe, 1984
d. San Francisco Community Boards - 1994
e. Big Brothers and Big Sisters of San Francisco - 2000
f. Zen Hospice Project/Laguna Honda Hospital - 2002
g. Pathways Home Health Care and Hospice - presently

2. I will bring the following insights, knowledge, experience, and/or educational background to the Retirement Board:

This opportunity serves as a natural way for me to give back to my community. For the past six years, I have worked as an investment advisor. As an investment advisor, I have advised individuals on issues pertaining to retirement planning. I have also helped not-for-profit organizations set up retirement plans.

Outside of my professional responsibilities, I co-founded a publishing company to publish my two books on personal finance. I know from experience that people need to participate in good pension plans to survive during their retirement years. I also have a law degree. I believe I can bring my investment experience, coupled with my legal education, to AC Transit in a relevant and cooperative manner.

3. I will bring the following specific areas of interest to the Retirement Board:

Throughout my financial services career, I have been struck by the fact that many people do not understand how their pension plan works. My specific area of interest (though I can make a contribution to monitoring investment consultants/advisors and setting investment strategies, etc.) is in helping the Board help retirees and beneficiaries understand how the plan works.

4. Relevant community groups and activities in which I am involved include:

My relevant activities include my work (I manage the San Ramon office of Prudential Financial) and my seminars/presentations around my books, *Beyond 40 Acres and Another Pair of Shoes* and *The Inheritance*. 
5. Other information that I believe is important for the District Board to consider when reviewing my application includes:

I enjoy working with others to achieve a common goal. My work requires me to be an independent thinker who works in collaboration with others.
Pamela Ayo Yetunde, C.S.A.
40 Maiden Lane, Oakland, CA 94602
510-482-4593
pay@mindworxgroup.com

PROFESSIONAL PROFILE
Six years progressive experience in financial consulting, planning and retail sales of mutual funds, stocks and bonds, retirement plans, insurance products and 529 plans. Leveraging my journalism background with legal and securities analysis skills, I built a client base of over 400 clients through seminars, publications and referrals. Extensive public speaking and media experience with large and small audiences. Sales support/call center and branch management.

FINANCIAL SERVICES EXPERIENCE
Prudential Financial San Ramon, California
Manager, Financial Services August 2003 - present
Responsible for recruiting, training, and managing financial advisors.

AIG VALIC San Mateo, California
Financial Advisor November 2002 - present
Responsible for providing investment advice on constructing and managing retirement plan portfolios.

and

AIG American General Financial Advisors
Investment Advisor Representative March 2003 - present
Responsible for providing financial planning for CalPERS seminar attendees.

Atlas Securities, Inc. San Leandro, California
Manager, Field (Sales) Support January - July, 2002
Responsible for building and managing the back-office sales support representative team responsible for providing information, research, sales ideas, and general sales support to the investment representative sales force, and telemarketing to customers. Also responsible for hiring, training, and writing training modules.

Salomon Smith Barney, San Francisco, California
Responsible for attracting clients and primarily providing investment advice on constructing and managing stock and mutual fund portfolios. 99% of my 400+ clients are through referrals and seminars.

• Awarded Blue Chip Council.
• Increased client base by 50% each year.
• Developed niche market strategy and brochure which was used nationally.

San Francisco Associates, San Francisco, California
Financial Planner November, 1996 – February, 1999
Responsible for attracting clients and providing advice in the areas of life, health and disability insurance, mutual fund analysis, asset allocation, and retirement planning.

• Recognized by Union Central Life Insurance as Top 10 Sales Person in the nation.
EDUCATION
Juris Doctor
Ball State University, Muncie, Indiana, November, 1984.
Bachelor of Arts in Journalism/Advertising

LICENSES
Securities Licenses include Series 7, 65, 63, and 6. Insurance Licenses include Life, Health, Long Term Care, and Disability.

PROFESSIONAL DESIGNATIONS
Certified Senior Advisor (CSA) by the Society of Certified Senior Advisors. The Society of Certified Senior Advisors addresses the continuing education needs of professionals regarding senior citizens.

PUBLICATIONS AND APPEARANCES

Books
"Beyond 40 Acres and Another Pair of Shoes: For Smart Sisters Who Think Too Much and Do Too Little about their Money", Marabella Books (1998)


Articles & Periodicals
- CITYFLIGHT Magazine, financial columnist, 1999 – 2000
- Arise Magazine, financial columnist, 2000
- Heart and Soul, December, 2001
- The Oakland Tribune, March, 2001
- The Berkeley Post, 2001
- Ebony Magazine, January & December, 2000
- The Indianapolis Recorder, 2000
- Black Enterprise, December, 2002
- National Urban Bankers Association (San Francisco, CA)
- Congressional Black Caucus Foundation (Washington, DC)
- Los Angeles Times Investment Conference (Los Angeles, CA)
- Various appearances on television and radio
- Texas Governor’s Conference for Women

Speaking Engagements (partial list)
- The Everywoman’s Money Conference National Empowerment Team (Nationwide)
- Patelco Credit Union (Various locations in California)
- Union Pacific Railroad (Chicago, IL)
- Kraft Foods (New York, Chicago)

AWARDS
California State Assembly Certificate of Recognition for “Outstanding Contribution to Education with the Development of Unique Financial Investment Programs” (2001)

Indiana University School of Law “Outstanding Contribution to Student Life” (1992)

VOLUNTEER ACTIVITIES

Bedside Volunteer - Zen Hospice Project at Laguna Honda Hospital (April 2002 to April 2003)
Bereavement Support Volunteer - Pathways Home Care and Hospice (July 2003 to present)
September 12, 2003

District Secretary
AC Transit
1600 Franklin Street
Oakland, CA 94612

District Secretary,

Please find my application for appointment to the

AC Transit District Retirement Board.

Please let me know if you need additional

information.

Sincerely,

Alex E. Esparza, CFA
APPLICATION FOR APPOINTMENT
TO THE AC TRANSIT DISTRICT RETIREMENT BOARD

NAME: Alex E. Esparza

RESIDENCE ADDRESS: 4841 Proctor Avenue Oakland 94618
Number Street City Zip Code

MAILING ADDRESS, if different: ____________________________
Number Street City Zip Code

TELEPHONE: (510) 333-4579 Ext. (___)

FAX: (510) 323-9155 EMAIL: alexesparza@pacbell.net

Responses to the following may be provided in the space below or on an attached sheet.

1. I am interested in serving on the AC Transit District Retirement Board because: 
   see attached.

2. I will bring the following insights, knowledge, experience, and/or educational background to the Retirement Board:

3. I will bring the following specific areas of interest to the Retirement Board:

4. Relevant community groups and activities in which I am involved include:

5. Other information that I believe is important for the District Board to consider when reviewing my application includes:

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SIGNED APPLICATION, TOGETHER WITH A RESUME, MUST BE RECEIVED NO LATER THAN 12:00 NOON ON FRIDAY, SEPTEMBER 12, 2003.
Mail or fax to: District Secretary, AC Transit, 1600 Franklin Street, Oakland 94612
(510) 891-4705

Signature Alex E. Esparza Date 08/21/2003

August 11, 2003
1. I am interested in serving on the AC Transit District Retirement Board?

I am interested in serving on the AC Transit Board because of my strong desire and commitment to see an effective AC Transit Retirement Board. I believe that the Board can meet its requirements for present and future pension funding levels without placing additional financial burdens on the operations of AC Transit.

2. I will bring the following insights, knowledge, experience, and/or educational background to the Retirement Board:

My 7 years as Treasurer of LaClinica gave me the opportunity to make the selection of our administrator, fund manager and fund selections for LaClinica's retirement plan. As a Chartered Financial Analyst, I am extremely knowledgeable of all government regulations and fiduciary requirements particularly ERISA requirements and Pension Fund Accounting. Additionally, I identified and selected the fund manager and fund allocation for LaClinica's investments.

3. I will bring the following specific areas of interest to the Retirement Board:

If selected as a Retirement Board member, my focus would be on ensuring that the retirement funds are appropriately allocated from a risk/return profile to meet existing and future funding requirements without affecting the current on-going AC Transit's operational commitments.

4. Relevant community groups and activities in which I am involved include:

I have been a Board Member of LaClinic De La Raza since 1993. During that time, I have been Treasurer for 6 years, Finance Committee 10 years, Executive Committee 3 years and am presently Board Vice President. In addition, I am member of Oakland Advisors where I provide my expertise to businesses in the local community. I have taught Financial Ethics and ERISA requirements for 5 years to CFA candidates.

5. Other information that I believe is important for the District Board to consider when reviewing my application includes:

My experience on boards and technical expertise in investing and pension funds will enable me to work well with other board members to achieve a positive consensus in all of the board's efforts. Extensive references are available upon request.
ALEX E. ESPARZA, CFA, MBA
4841 Proctor Avenue
Oakland, CA 94618
510.450.0177

Competitive Intelligence/Business Development/Financial Management with over 15 years of international and domestic telecommunications experience in competitive intelligence, marketing, business development, strategic planning, mergers and acquisitions, and finance. Prepared business and strategic plans for global e-commerce telecommunications markets, domestic telecommunications data market, competitor profiles, wireless opportunities, public Internet access, as well as mergers and acquisitions in telecommunications businesses, retail, and manufacturing. Deployed the most financially successful public Internet kiosks in the United States. Implemented successful marketing plans throughout the world for wireless licenses, container vessel deployment and agricultural products. Provided marketing and financial advice to over 20 subsidiaries valued from $400 million to $5 billion. Evaluated financial performance of over 35 projects as well as mergers and acquisitions valued from $1 million to $250 million.

CAREER HIGHLIGHTS

Competitive Intelligence and Strategic Plans
Prepared strategic plans to assess impacts of global e-commerce telecommunications and domestic telecommunication data markets, high-speed Ethernet, wireless growth and penetration, public Internet deployment, mergers and acquisitions, competitive threats and responses as well as potential long-distance markets for telecommunication businesses valued at over $1 billion. Published bimonthly newsletter on telecommunications market conditions. Evaluated public communications market segments for their potential value and competitive structure.

Consumer Product Research
Conducted initial survey of selected communities for their suitability to test the impacts of a local rate increase. Developed consumer research to measure responses and acceptance to the use of Internet access at Oakland and Seattle international airports as well as responses to use of telecommunication products. Evaluated and measured consumer response to change in rates for directory assistance across 7 western states. Identified key economic variables and determined their impact on California's energy consumption.

Business Performance Management
Developed and monitored performance measurements for $500 million telecommunications business. Identified key drivers, set annual targets and measured each of the drivers on a monthly, quarterly and annual basis. Set annual financial and qualitative targets for operations, marketing, technology, human resources and administration. Responded to performance issues with intervention strategies. Established and managed large financial, customer and qualitative databases for the purpose of evaluating performance, determining value attributes and financial indicators.

Management and Supervisor Responsibilities
Team lead responsible for all product deployment activities including establishment of responsibilities, negotiating deliverables and ensuring that products meet quality standards as well as deadlines. Supervised budget analysts' preparation of monthly revenue, expense, capital expenditures and performance measurements. Co-lead performance audit of telephone message recording, billing, revenue and commission systems with billing analysts, programmers, auditors and field operations for a business unit with $700 million of annual revenue.
ALEX E. ESPARZA, CFA, MBA
4841 Proctor Avenue
Oakland, CA 94618
510-450-0177

CHRONOLOGY
Pacific Telesis Group, 39 Beta Court, San Ramon, California, 94602, May, 1989-present.
Associate Director Competitive Intelligence and Corporate Analysis Group
• Completed competitive reports on e-commerce for multi-billion dollar telecommunications and
domestic telecommunications markets.
• Developing small business models which will identify those customers most likely to respond
favorably to new product offerings as well as answering specific wireline market demand issues.
• Conducted competitive intelligence efforts to assess impacts of increasing wireless penetration,
mergers and acquisitions, Internet telephony, smart cards, prepaid phone cards, major contract
negotiations. Prepared market segmentation and business plan profiles for a $1.2 billion annual
revenue public pay phone business unit.
• Deployed the most successful public Internet kiosks at San Diego International airport. As the
team leader of 10 professionals developed a complete business case, negotiated contracts, complied
with all legal and regulatory concerns and completed deployment. Enhanced Internet revenue
by featuring Wells Fargo, Pacific Bell Internet and E-commerce providers.
• Directed staff in preparation of monthly financial results for a $350 million business. Analyzed
revenue performance, controlled capital budget process, prepared business plans, and developed
econometric models for $50 million commission budget.
• Developed business plans, annual budget, cash flow funding, capital expenditures, and decisions on
acquisitions/dispositions for 6 domestic and international subsidiaries in Japan, Germany and
England. Designed cash flow software to implement FASB 95.

Manager
• Prepared marketing plans for deployment of large scale shipping deployments and
infrastructure throughout Asia and United States ranging in value from between $20 to $250 million.
• Created capital policy manual to standardize and improve executives expenditure reporting, hedging
of foreign currencies.

Manager-Economic Development/Administrative Assistant
• Secured federal funding, county approval for a county economic development and strategic plan
including establishment of a local leadership organizational structure for five cities.
• Advised elected county officials on departmental and countywide budget expenditures required to
meet public service commitments.

EDUCATION
MBA ~ Finance, University of Denver, Colorado, June 1982.
BA ~ Economics, University of California, Santa Barbara, March 1974.