

File No. 130144

Committee Item No. 2
Board Item No. _____

COMMITTEE/BOARD OF SUPERVISORS

AGENDA PACKET CONTENTS LIST

Committee: Rules

Date 3/21/13

Board of Supervisors Meeting

Date _____

Cmte Board

- | | | |
|-------------------------------------|--------------------------|--|
| <input type="checkbox"/> | <input type="checkbox"/> | Motion |
| <input type="checkbox"/> | <input type="checkbox"/> | Resolution |
| <input type="checkbox"/> | <input type="checkbox"/> | Ordinance |
| <input type="checkbox"/> | <input type="checkbox"/> | Legislative Digest |
| <input type="checkbox"/> | <input type="checkbox"/> | Budget Analyst Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Legislative Analyst Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Youth Commission Report |
| <input type="checkbox"/> | <input type="checkbox"/> | Introduction Form (for hearings) |
| <input type="checkbox"/> | <input type="checkbox"/> | Department/Agency Cover Letter and/or Report |
| <input type="checkbox"/> | <input type="checkbox"/> | MOU |
| <input type="checkbox"/> | <input type="checkbox"/> | Grant Information Form |
| <input type="checkbox"/> | <input type="checkbox"/> | Grant Budget |
| <input type="checkbox"/> | <input type="checkbox"/> | Subcontract Budget |
| <input type="checkbox"/> | <input type="checkbox"/> | Contract/Agreement |
| <input type="checkbox"/> | <input type="checkbox"/> | Award Letter |
| <input checked="" type="checkbox"/> | <input type="checkbox"/> | Application |
| <input type="checkbox"/> | <input type="checkbox"/> | Public Correspondence |

OTHER

(Use back side if additional space is needed)

<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____
<input type="checkbox"/>	<input type="checkbox"/>	_____

Completed by: Linda Wong

Date 3/18/13

Completed by: _____

Date _____

An asterisked item represents the cover sheet to a document that exceeds 25 pages. The complete document is in the file.



**Board of Supervisors
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, Room 244
(415) 554-5184 FAX (415) 554-7714**

Application for Boards, Commissions, Committees, & Task Forces

Name of Board, Commission, Committee, or Task Force: Citizen's General Obligation B

Seat # or Category (If applicable): 1# District: Oversight Com.

Name: K. Jacquelyn Omotalade

Home Address: Bartlett St Zip: 94110

Home Phone: 412 Occupation: Senior Program Manager

Work Phone: _____ Employer: Blue Shield of CA

Business Address: 50 Beale St Zip: _____

Business E-Mail: jackie.omotalade@gmail.com Home E-Mail: _____

Pursuant to Charter Section 4.101 (a)2, Boards and Commissions established by the Charter must consist of electors (registered voters) of the City and County of San Francisco. For certain other bodies, the Board of Supervisors can waive the residency requirement.

Check All That Apply:

Registered voter in San Francisco: Yes No If No, where registered: _____

Resident of San Francisco Yes No If No, place of residence: _____

Pursuant to Charter section 4.101 (a)1, please state how your qualifications represent the communities of interest, neighborhoods, and the diversity in ethnicity, race, age, sex, sexual orientation, gender identity, types of disabilities, and any other relevant demographic qualities of the City and County of San Francisco:

See attached

Business and/or professional experience:

See attached

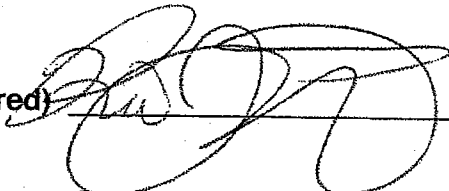
Civic Activities:

See attached

Have you attended any meetings of the Board/Commission to which you wish appointment? Yes No

For appointments by the Board of Supervisors, appearance before the RULES COMMITTEE is a requirement before any appointment can be made. (Applications must be received 10 days before the scheduled hearing.)

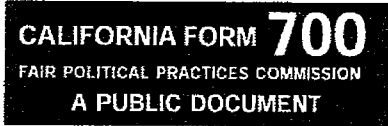
Date: 2/21/13 Applicant's Signature: (required)



Please Note: Your application will be retained for one year. Once Completed, this form, including all attachments, become public record.

FOR OFFICE USE ONLY:

Appointed to Seat #: _____ Term Expires: _____ Date Seat was Vacated: _____



STATEMENT OF ECONOMIC INTERESTS

Date Received Official Use Only

COVER PAGE

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE) Omotulade, Kia-Jacquelyn

1. Office, Agency, or Court

Agency Name

Division, Board, Department, District, if applicable Your Position

If filing for multiple positions, list below or on an attachment.

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

- State, Multi-County, City of SF, Judge or Court Commissioner, County of, Other

3. Type of Statement (Check at least one box)

- Annual: The period covered is January 1, 2012, through December 31, 2012. Leaving Office: Date Left, The period covered is 9/1/2012 through December 31, 2012. Assuming Office: Date assumed, Candidate: Election year

4. Schedule Summary

- Schedule A-1, A-2, B, C, D, E, None - No reportable interests on any schedule. Total number of pages including this cover page: 2

5. Verification

MAILING ADDRESS (Business or Agency) 412 Bartlett St SF CA 94110 DAYTIME TELEPHONE NUMBER E-MAIL ADDRESS (OPTIONAL)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 2/22/13 Signature

Jacquelyn is an innovative global leader that has successfully built and led non-profit and healthcare organizations delivering complex services that serve thousands. Jackie has founded new organizations and transformed struggling non-profits into powerhouses with high impact and financial stability for nearly 10 years. She is also a grant reviewer to the US Department of Health and Human Services.

Currently, Jackie is transforming healthcare as a senior program manager for Blue Shield of California where she works in Network Management creating and managing accountable care organizations (ACOs). An **accountable care organization** (ACO) is a healthcare organization characterized by a payment and care delivery model that seeks to tie provider reimbursements to quality metrics and reductions in the total cost of care for an assigned population of patients. A group of coordinated health care providers forms an ACO, which then provides care to a group of patients.

Formerly, Jackie was transforming training for public health professionals in California, Hawaii and the US Pacific Islands as the founding Senior Program Manager of the California Pacific Public Health Training Center at the University of California at Berkeley, CA (CALPACT). Jackie has energized the training landscape for public health professionals by using new technologies including social media, podcasts, webinars, radio broadcasts and online courses. Upon receiving a 5 year grant, Jackie created the innovative strategic plan and built an organization that uses new media to provide training to previously underserved populations of public health professionals. CALPACT clients include over 200 organizations ranging from fire departments to Kaiser Permanente to promotoras (community health workers) who receive training in Spanish through CALPACT.

Jackie was instrumental in improving hospital management practices (including reducing patient wait time by 50%) in all 13 public hospitals in Ethiopia as a Clinton Foundation Hospital Management Initiative Fellow. She worked with hospital management teams and the Ministry of Health to identify problems and implement new systems for infection control, nursing standards, hospital budgeting and sustainable financing.

In Kenya, Jackie's work reached over 68,000 people with messages promoting HIV/AIDS education as the Executive Director of Global Outreach for Addition Leadership and Learning (GOAL Project).

As a Fulbright Scholar in Indonesia, Jackie managed a local NGO that trained domestic help workers in participatory activism including the use of cameras for social change.

Jackie's interests extend beyond healthcare into entrepreneurial pursuits (currently the founder of two companies), practicing law for several years, and community involvement as a Board member of Big Brothers Big Sisters Bay Area Junior Board, co-President of the Board of Directors, Brava Theater for Women in the Arts, and a program member of Emerge California, a political candidate training program for Democratic women. She is a member of the One World Project's Committee - a organization that helps small non-profits that help children all over the world.

Jackie O. is a powerhouse in other areas of her life as well. She is a founding member of the San Francisco chapter of Ladies America. She also a member of A Band of Wives (ABOW). She is a former model and accomplished actress who has appeared in numerous plays. Jackie O. is a Big Sister with Big Brothers Big Sisters. She runs her own political blog called the Politico Princess where she discusses political issues in the bay area and beyond. She was elected a delegate from San Francisco to the Democratic National Convention in Charlotte in 2012.



Board of Supervisors
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, Room 244
(415) 554-5184 FAX (415) 554-7714

Application for Boards, Commissions, Committees, & Task Forces

Name of Board, Commission, Committee, or Task Force: Citizens' General Obligation Board Oversight Committee

Seat # or Category (If applicable): 2 District: 8

Name: Minnicola Ingersoll

Home Address: 20th Street, San Francisco Zip: 94114

Home Phone: 650 Occupation: Principal, Civics

Work Phone: _____ Employer: Google.org

Business Address: 1600 Amphitheatre Pkwy, Mountain View Zip: 94043

Business E-Mail: minnie@google.com Home E-Mail: _____@gmail.com

Pursuant to Charter Section 4.101 (a)2, Boards and Commissions established by the Charter must consist of electors (registered voters) of the City and County of San Francisco. For certain other bodies, the Board of Supervisors can waive the residency requirement.

Check All That Apply:

Registered voter in San Francisco: Yes No If No, where registered: _____

Resident of San Francisco Yes No If No, place of residence: _____

Pursuant to Charter section 4.101 (a)1, please state how your qualifications represent the communities of interest, neighborhoods, and the diversity in ethnicity, race, age, sex, sexual orientation, gender identity, types of disabilities, and any other relevant demographic qualities of the City and County of San Francisco:

Business and/or professional experience:

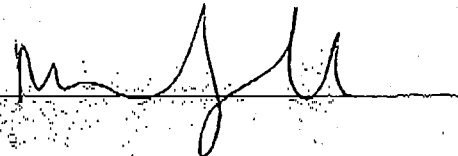
[Empty box for business and/or professional experience]

Civic Activities:

[Empty box for civic activities]

Have you attended any meetings of the Board/Commission to which you wish appointment? Yes No

For appointments by the Board of Supervisors, appearance before the RULES COMMITTEE is a requirement before any appointment can be made. (Applications must be received 10 days before the scheduled hearing.)

Date: 3/5/13 Applicant's Signature: (required) 

Please Note: Your application will be retained for one year. Once Completed, this form, including all attachments, become public record.

FOR OFFICE USE ONLY:
Appointed to Seat #: _____ Term Expires: _____ Date Seat was Vacated: _____
01/20/12

Pursuant to Charter section 4.101 (a)1, please state how your qualifications represent the communities of interest, neighborhoods, and the diversity in ethnicity, race, age, sex, sexual orientation, gender identity, types of disabilities, and any other relevant demographic qualities of the City and County of San Francisco:

I have a degree in computer science from Stanford University and have been employed at Google since 2002. I have lived in San Francisco's District 8 since 2002 and am well connected within the technology business community (Google, Twitter, Square, Jawbone, Eventbrite, etc) as well as within my neighborhood.

In my role as principal of Google's Civics team, I have worked with cities nationwide to bring best practices into product solutions that can be scaled across cities. I have engaged with San Francisco to transform their election data and transit data into standard-compliant feeds that are exposed in APIs and end-user products now used by millions. In my professional capacity, my engagement with San Francisco has spanned the Mayor's office, community groups, business organizations such as SFciti, the Board of Supervisors, and numerous city departments.

I am an active member of the Women@Google network as well as the Google Women in Engineering program. Both groups provide development opportunities for women and represent Google in the community. I am a regular speaker and have helped organize networking events.

Business and/or professional experience:

I have experience managing enterprise software implementations, multi-billion dollar audits, establishing platforms for metric measurement and reporting as well as managing public-private partnerships in the municipal space.

After Stanford I joined McKinsey as a business analyst with a focus on knowledge management and mostly worked on enterprise software. I left McKinsey in 1999 to join a startup where I was in charge of project management. In this role I helped grow the company from 20 to 200 employees by implementing business processes and solutions such as a company-wide implementation of Siebel CRM, PeopleSoft Financials, PeopleSoft HR. We IPO'd; but after the dotcom crash I decided to go to Harvard Business School to learn more about the financial side of running a company.

After graduating from Harvard, I joined Google in 2002 as a product manager. My first two years were spent guiding Google through an audit so that we could file for an IPO. My role was to document all of our existing billing and accounting practices, propose process reform where needed and eventually to work with Ernst and Young to prepare a report for the Board and for the SEC.

After Google passed an audit and went public I moved to the search team where I ran our new metrics group. Our team developed Google's first platform for crowdsourced evaluation of search results. Using this new platform we refined the metrics used to classify manual search ratings and to understand trends and strategic tradeoffs of different search algorithm changes.

I was still working on search and advertising optimization when I was at a dinner with

former mayor Gavin Newsom. I pitched him on the potential for municipal WiFi using mesh networks, but did not expect him to announce the next day that San Francisco would create the largest citywide free WiFi network ever built. This was my 20% project until it grew to encompass nearly all of my time. We held community meetings in every district and spent almost a year meeting with every stakeholder, devising partnership strategies, and eventually having our free network proposal turned away by the Board.

Since then, I have been leading Google's Access team with a goal of bringing faster broadband at lower prices to more people. We built out the largest mesh WiFi network in the country in Mountain View, CA, where we consistently have over 20,000 active users in a city of 75,000. I worked with the US Congress on the National Broadband Plan, I've worked extensively with the FCC on spectrum reform, and most recently launched a contest for cities to apply to get Gigabit speed Internet via Fiber to the Home. We have spent a year negotiating rights of way, digging trenches, planning phased deployment, battling the incumbents and we now have our first live customers in Kansas City.

In addition to my work on Access, for the past year I have been a principal on Google.org's Civic Innovation team. The Civic Innovation team is applying technical solutions to foster effective, open and innovative societies. This work has taken me into close contact with municipal governments and has inspired my interest in joining this commission.

Last year the Civic Innovation team launched a Voter Information Tool that provides an API to answer the questions: "who's on my ballot", "where is my polling location", and "what ID do I need to bring". Our voting tools were used over 115M times for the November 2012 elections. This required working with cities and counties across the nation to develop a standard for publishing this data and then coordinating an effort to have this standard adopted. Since November we have been working to expand this open data project to include standards for publishing and exposing more city data including a variety of city services such as transportation, city events, 311, and public safety.

Working on products with millions of end-users I've seen how choosing the right metrics can influence not only what is measured but also what is built. I'm confident that my experience managing large project implementations and measuring their effectiveness can be an asset to this commission in reviewing and assessing service standards and benchmarks.

Civic Activities:

I am currently a judge on the Bloomberg Mayors Challenge. We evaluated innovative project submissions from over 300 cities on criteria of vision, impact, implementation, and scalability. After three rounds of judging, we have just chosen our 5 winners to receive \$9M to start building their projects.

I am involved with Citizen Schools as an organizer and volunteer teach (2010/2011). As a volunteer teacher, I taught a 2-hour after school program once a week to eighth graders.

In 2006, I launched a partnership between Google employees and janitors to teach English as a second language. Seven years later, the program is still widely popular

with over 50 janitor-students in any given class. Through my involvement in this program (I have been a tutor on and off for the past 7 years), I now know all of the daytime janitorial staff in my building. In my life, this program is one of the programs I am most proud to be a part of.

Through my role at Google I have championed a variety of civic service activities including the installation of free WiFi in a variety of cities. We now have 7 WiFi zones built, including our most recent installation in New York (Chelsea) and our flagship citywide network covering all of Mountain View.

My interest is to get more engaged with San Francisco so that we can make San Francisco a flagship WiFi city as well. To further this goal, I have recently agreed to join Mayor Lee's WiFi Advisory Group and to mentor a new Civic Innovation fellow to be working under Jay Nath.

The General Obligation Bonds are creating structures that will shape the public buildings and streets of our city for generations and I believe that I have experience and passion to help. I hope to have the chance to contribute further to San Francisco by joining this commission and helping to ensure that these very important San Francisco projects are being delivered on time, on budget, and on scope.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
A PUBLIC DOCUMENT

STATEMENT OF ECONOMIC INTERESTS

Date Received
Official Use Only

COVER PAGE

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE)
Ingersoll Minneola Perry

1. Office, Agency, or Court

Agency Name

Division, Board, Department, District, if applicable
Citizens' General Obligation Bond Oversight Committee

Your Position
Commission applicant

► If filing for multiple positions, list below or on an attachment.

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)

- State
- Multi-County _____
- City of San Francisco
- Judge or Court Commissioner (Statewide Jurisdiction)
- County of _____
- Other _____

3. Type of Statement (Check at least one box)

- Annual: The period covered is January 1, 2012, through December 31, 2012.
-or-
The period covered is _____, through December 31, 2012.
- Assuming Office: Date assumed _____
- Candidate: Election year _____ and office sought, if different than Part 1: _____
- Leaving Office: Date Left _____ (Check one)
○ The period covered is January 1, 2012, through the date of leaving office.
○ The period covered is _____, through the date of leaving office.

4. Schedule Summary

Check applicable schedules or "None."

► Total number of pages including this cover page: 1

- Schedule A-1 - Investments - schedule attached
- Schedule A-2 - Investments - schedule attached
- Schedule B - Real Property - schedule attached
- Schedule C - Income, Loans, & Business Positions - schedule attached
- Schedule D - Income - Gifts - schedule attached
- Schedule E - Income - Gifts - Travel Payments - schedule attached

-or-
 None - No reportable interests on any schedule

5. Verification

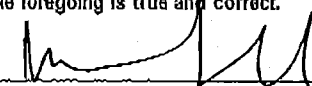
MAILING ADDRESS STREET CITY STATE ZIP CODE
(Business or Agency Address Recommended - Public Document)
20th Street San Francisco CA 94114

TELEPHONE NUMBER () @gmail.com

I have used reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 03/06/2013
(month, day, year)

Signature 
(File the originally signed statement with your filing official.)

FPPC Form 700 (2012/2013)
FPPC Advice Email: advice@fppc.ca.gov
FPPC Toll-Free Helpline: 866/275-3772 www.fppc.ca.gov

SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
 FAIR POLITICAL PRACTICES COMMISSION
 Name _____

▶ NAME OF BUSINESS ENTITY
Google Inc

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Internet

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)
 Partnership Income Received of \$0 - \$499
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IF APPLICABLE, LIST DATE:
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GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE
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IF APPLICABLE, LIST DATE:
 _____ / _____ / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

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GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE
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 _____ / _____ / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

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GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE
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 \$100,001 - \$1,000,000 Over \$1,000,000

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(Describe)
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IF APPLICABLE, LIST DATE:
 _____ / _____ / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE
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 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

Comments: _____

MINNIE INGERSOLL

20th St, San Francisco, CA 94114
@gmail.com; (650)

Experience **GOOGLE, INC.** **MOUNTAIN VIEW, CA**

- 2011-2013** **Access Strategy, Google Ideas, and Civics (Google.org); Principal**
- Access: Started Fiber to the Home project in Kansas City, garnered nationwide interest, did initial trial deployment at Stanford, hired full time team
 - Google Ideas: Creating tools to help people access information, publish information, and to maintain digital security in potentially hostile situations.
 - Civics: Google.org is working to invent technologies to reimagine the institution of government. Current projects include developing open data standards and helping governments with civic information discovery.
- 2007-2011** **Access Strategy Team (Business Operations); Principal**
- Led a cross-functional product/policy/eng team bringing the open ethos of the Internet to the wireless industry.
 - Ran the Google auction team that bid \$4.6B on the 700 MHz C block and managed full "war room".
 - Successfully lobbied the FCC to adopt openness principles on the \$20B auction of 700 MHz airwaves.
 - Won a 5-0 vote at the FCC to make 100s of MHz of spectrum in the TV White Spaces available for unlicensed use. Directed campaign that sent 15,000 petitions to the FCC. Coordinated management advocacy in DC.
 - Chaired the industry association focused on White Spaces deployment (with Msoft, Moto, Qcomm, Dell, etc).
 - On product team responsible for investments in Clearwire (\$500M for 2.5MHz spectrum), Ubiquisys (\$20M in femtocells), O3B (\$20M in MEO satellites), Meraki (\$250k)
- 2005-2007** **Google Wi-Fi and Location Based Services; Product Manager/Co-Founder**
- Deployed and ran the largest municipal Wi-Fi network in the country (in Mountain View, CA).
 - Built the backend for the first version of Google Mobile Maps with location awareness.
 - Mentored 5 summer interns that developed into a start-up (Meraki) and managed Google's angel investment.
- 2004-2005** **Google Talk and Google Chat; Product Manager**
- Launched a platform for realtime messaging and presence using open-source standards.
 - Built Gmail integration and launched Gmail Notifier and presence in Gmail.
- 2002-2004** **Search and Ads Backend; Product Manager**
- Developed Google's first platform for crowdsourced evaluation of search results. Refined the metrics used to classify manual search ratings and to understand trends and strategic tradeoffs.
 - Created an objective pre-launch process for all search quality improvements.
 - Automated the customer data and billing integration between AdWords frontend, Oracle, and invoicing tool.
 - Designed and managed the creation of daily budgets for AdWords.

1999-2000 **LIVEPERSON, INC.** **NEW YORK, NY**
Product Management
 Responsibilities included product management, operations scaling, business development, employee training, Siebel and PeopleSoft implementation.

1998-1999 **MCKINSEY & CO** **NEW YORK, NY**
Knowledge Management
 Strategic planning for systems doing knowledge capture, storage, and dissemination. Worked with McKinsey Practices to integrate their backend systems with McKinsey's central databases and applications.

Education

2000-2002 **HARVARD BUSINESS SCHOOL** **BOSTON, MA**
 Master in Business Administration, 2002. Humor writer for Harvard Business School newspaper.

1994-1998 **STANFORD UNIVERSITY** **STANFORD, CA**
 Bachelor of Science degree in Computer Science, Tau Beta Pi. Captain, School of Engineering softball team. Teaching Assistant: CS106, "Programming Abstractions". Teacher: CS198, "Teaching Computer Science".

Activities

Ironman Louisville finisher, 2008; Launched a partnership between Google employees and janitors to teach ESL. Citizen Schools contributor and volunteer. Judge for Bloomberg Mayors Challenge.



Board of Supervisors
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, Room 244
(415) 554-5184 FAX (415) 554-7714

Application for Boards, Commissions, Committees, & Task Forces

Name of Board, Commission, Committee, or Task Force: Citizens' General Obligation Bond Oversight Committee

Seat # or Category (If applicable): 1 District: _____

Name: Susanne Berg

Home Address: Green Street Zip: 94123

Home Phone: 415 Occupation: Attorney

Work Phone: 415-252-7113 Employer: sberg@parktreeinvestments.com

Business Address: 425 Divisadero Street, Suite 207 Zip: 94117

Business E-Mail: sberg@parktreeinvestments.com Home E-Mail: @gmail.com

Pursuant to Charter Section 4.101 (a)2, Boards and Commissions established by the Charter must consist of electors (registered voters) of the City and County of San Francisco. For certain other bodies, the Board of Supervisors can waive the residency requirement.

Check All That Apply:

Registered voter in San Francisco: Yes [X] No [] If No, where registered: _____

Resident of San Francisco [X] Yes [] No If No, place of residence: _____

RECEIVED BOARD OF SUPERVISORS SAN FRANCISCO 2013 FEB 26 AM 8:24

Pursuant to Charter section 4.101 (a)1, please state how your qualifications represent the communities of interest, neighborhoods, and the diversity in ethnicity, race, age, sex, sexual orientation, gender identity, types of disabilities, and any other relevant demographic qualities of the City and County of San Francisco:

I am qualified to sit on the Citizens' General Obligation Bond Oversight Committee as I am employed by a business organization that is within the City and County of san Francisco. It is a small business and has been in operation in San Francisco since 2005. Additionally, as a woman I represent an often overlooked demographic of the business community.

Business and/or professional experience:

Director of Asset Strategy and In-House Counsel, Park Tree Investments, April 2009-Current: Responsible for understanding, reviewing, and managing the Company's portfolio risk and for directing asset-level strategy. Oversee all legal matters including title claims, contested foreclosures and bankruptcy. Responsible for legal analysis and counsel on contract and deal negotiations. Oversee post-transaction closing including service transfer, RESPA and TIL compliance. Service transfer oversight has included managing an acquisition that included the service transfer of over 1300 loans from 40 different servicers.

Corporate Counsel, Nova Ventures Corporation, January 2006-April 2009: Part of acquisition team and lead for due diligence efforts for the acquisition of six companies.


Civic Activities:

Junior Leagues of California State Public Affairs Committee (SPAC), Co-Chair, May 2012-Present: SPAC, a non-partisan, all volunteer organization, has been involved in legislative advocacy for more than 40 years. We represent a coalition of 16 Junior Leagues comprised of over 10,000 women. SPAC supports the Junior League's mission to improve communities through effective action and leadership. SPAC supports legislation in the areas that impact violence prevention, education, health, and family support.

Junior League of San Francisco (JLSF): Chair, Community Program Development (2012-2013), Home Tour Co-Chair Elect (2012-2013), SPAC Delegate (2010-2012), Advocacy Chair (2009-2010), and Volunteer Chair 2008-2009).

Have you attended any meetings of the Board/Commission to which you wish appointment? Yes No

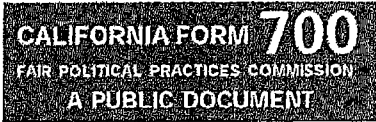
For appointments by the Board of Supervisors, appearance before the RULES COMMITTEE is a requirement before any appointment can be made. (Applications must be received 10 days before the scheduled hearing.)

Date: 2/25/13 Applicant's Signature: (required) 

Please Note: Your application will be retained for one year. Once Completed, this form, including all attachments, become public record.

FOR OFFICE USE ONLY:
Appointed to Seat #: _____ Term Expires: _____ Date Seat was Vacated: _____

01/20/12



STATEMENT OF ECONOMIC INTERESTS COVER PAGE

Date Received Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE) Berg Susanne Beth

1. Office, Agency, or Court

Agency Name Citizens' General Obligation Bond Oversight Committee
Division, Board, Department, District, if applicable Your Position Committee member

If filing for multiple positions, list below or on an attachment.

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

State Multi-County City of San Francisco Judge or Court Commissioner (Statewide Jurisdiction) County of San Francisco Other

3. Type of Statement (Check at least one box)

Annual: The period covered is January 1, 2012, through December 31, 2012. Leaving Office: Date Left (Check one) The period covered is January 1, 2012, through the date of leaving office. Assuming Office: Date assumed The period covered is the date of leaving office. Candidate: Election year 2013 and office sought, if different than Part 1:

4. Schedule Summary

Check applicable schedules or "None." Total number of pages including this cover page: 13
Schedule A-1 - Investments - schedule attached Schedule C - Income, Loans, & Business Positions - schedule attached
Schedule A-2 - Investments - schedule attached Schedule D - Income - Gifts - schedule attached
Schedule B - Real Property - schedule attached Schedule E - Income - Gifts - Travel Payments - schedule attached
None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE
DINSADEN St. Luke 207, SF, CA 94117
TELEPHONE NUMBER (415) E-MAIL ADDRESS (OPTIONAL)

I have used due diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 02/25/13 Signature (File the originally signed statement with your filing official.)

SCHEDULE A-2
Investments, Income, and Assets
of Business Entities/Trusts
(Ownership Interest is 10% or Greater)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
Name

1 BUSINESS ENTITY OR TRUST
Park Tree Investments 1, LLC
Name
425 Divisadero Street, Suite 207
Address (Business Address Acceptable)
Check one
[] Trust, go to 2 [x] Business Entity, complete the box, then go to 2
GENERAL DESCRIPTION OF BUSINESS ACTIVITY
FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
[] \$0 - \$1,999 [] / / 12 [] / / 12
[] \$2,000 - \$10,000 [] ACQUIRED [] DISPOSED
[x] \$10,001 - \$100,000
[] \$100,001 - \$1,000,000
[] Over \$1,000,000
NATURE OF INVESTMENT
[] Partnership [] Sole Proprietorship [x] LLC Membership [] Other
YOUR BUSINESS POSITION Investor-50%

2 IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)
[x] \$0 - \$499 [] \$10,001 - \$100,000
[] \$500 - \$1,000 [] OVER \$100,000
[] \$1,001 - \$10,000

3 LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary)
[x] None

4 INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST
Check one box:
[] INVESTMENT [] REAL PROPERTY
Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property
Description of Business Activity or City or Other Precise Location of Real Property
FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
[] \$2,000 - \$10,000 [] / / 12 [] / / 12
[] \$10,001 - \$100,000 [] ACQUIRED [] DISPOSED
[] \$100,001 - \$1,000,000
[] Over \$1,000,000
NATURE OF INTEREST
[] Property Ownership/Deed of Trust [] Stock [] Partnership
[] Leasehold [] Other
[] Check box if additional schedules reporting investments or real property are attached

Comments:

1 BUSINESS ENTITY OR TRUST
Name
Address (Business Address Acceptable)
Check one
[] Trust, go to 2 [] Business Entity, complete the box, then go to 2
GENERAL DESCRIPTION OF BUSINESS ACTIVITY
FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
[] \$0 - \$1,999 [] / / 12 [] / / 12
[] \$2,000 - \$10,000 [] ACQUIRED [] DISPOSED
[] \$10,001 - \$100,000
[] \$100,001 - \$1,000,000
[] Over \$1,000,000
NATURE OF INVESTMENT
[] Partnership [] Sole Proprietorship [] Other
YOUR BUSINESS POSITION

2 IDENTIFY THE GROSS INCOME RECEIVED (INCLUDE YOUR PRO RATA SHARE OF THE GROSS INCOME TO THE ENTITY/TRUST)
[] \$0 - \$499 [] \$10,001 - \$100,000
[] \$500 - \$1,000 [] OVER \$100,000
[] \$1,001 - \$10,000

3 LIST THE NAME OF EACH REPORTABLE SINGLE SOURCE OF INCOME OF \$10,000 OR MORE (Attach a separate sheet if necessary)
[] None

4 INVESTMENTS AND INTERESTS IN REAL PROPERTY HELD OR LEASED BY THE BUSINESS ENTITY OR TRUST
Check one box:
[] INVESTMENT [] REAL PROPERTY
Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property
Description of Business Activity or City or Other Precise Location of Real Property
FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
[] \$2,000 - \$10,000 [] / / 12 [] / / 12
[] \$10,001 - \$100,000 [] ACQUIRED [] DISPOSED
[] \$100,001 - \$1,000,000
[] Over \$1,000,000
NATURE OF INTEREST
[] Property Ownership/Deed of Trust [] Stock [] Partnership
[] Leasehold [] Other
[] Check box if additional schedules reporting investments or real property are attached

SCHEDULE C Income, Loans, & Business Positions (Other than Gifts and Travel Payments)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
 Name _____

1. INCOME RECEIVED

NAME OF SOURCE OF INCOME
 Park Tree Investments

ADDRESS (Business Address Acceptable)
 425 Divisadero Street, Suite 207

BUSINESS ACTIVITY, IF ANY, OF SOURCE
 Mortgage Investments

YOUR BUSINESS POSITION
 Attorney

GROSS INCOME RECEIVED
 \$500 - \$1,000 \$1,001 - \$10,000
 \$10,001 - \$100,000 OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED
 Salary Spouse's or registered domestic partner's income
 Loan repayment Partnership
 Sale of _____
(Real property, car, boat, etc.)
 Commission or Rental Income, list each source of \$10,000 or more
 Other _____
(Describe)

1. INCOME RECEIVED

NAME OF SOURCE OF INCOME
 Capital Access Group

ADDRESS (Business Address Acceptable)
 Commercial Lending

BUSINESS ACTIVITY, IF ANY, OF SOURCE
 Consultant

YOUR BUSINESS POSITION

GROSS INCOME RECEIVED
 \$500 - \$1,000 \$1,001 - \$10,000
 \$10,001 - \$100,000 OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED
 Salary Spouse's or registered domestic partner's income
 Loan repayment Partnership
 Sale of _____
(Real property, car, boat, etc.)
 Commission or Rental Income, list each source of \$10,000 or more
 Other 1099 Employee _____
(Describe)

2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

* You are not required to report loans from commercial lending institutions, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF LENDER

HIGHEST BALANCE DURING REPORTING PERIOD
 \$500 - \$1,000
 \$1,001 - \$10,000
 \$10,001 - \$100,000
 OVER \$100,000

INTEREST RATE TERM (Months/Years)
 _____ % None _____

SECURITY FOR LOAN
 None Personal residence
 Real Property _____
Street address

City
 Guarantor _____
 Other _____
(Describe)

Comments: _____

Business and/or professional experience:

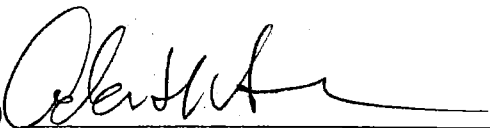
See attached resume.

Civic Activities:

See attached cover letter.

Have you attended any meetings of the Board/Commission to which you wish appointment? Yes No

For appointments by the Board of Supervisors, appearance before the RULES COMMITTEE is a requirement before any appointment can be made. (*Applications must be received 10 days before the scheduled hearing.*)

Date: 2/14/2013 Applicant's Signature: (required) 

Please Note: Your application will be retained for one year. Once Completed, this form, including all attachments, become public record.

FOR OFFICE USE ONLY:
Appointed to Seat #: _____ Term Expires: _____ Date Seat was Vacated: _____

Board of Supervisors
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, Room 244
San Francisco, CA 94102

February 14, 2013

To Whom it May Concern

Please accept this letter and application for the Citizens' General Obligation Bond Oversight Committee. I believe I am well qualified for the position, and that this position would be an excellent advancement in my career with the City of San Francisco, as well as beneficial to the continued growth and development of the Livable Streets team.

Through my 16 years as a Transportation Planner with the San Francisco Department of Parking and Traffic and the San Francisco Municipal Transportation Agency, I meet and exceed the minimum requirements of experience for this position, during which I worked directly with the projects this position will lead. I have consistently demonstrated my skills in clear oral communication, coalition building and network development, and in planning and executing effective transportation related campaigns. My experience, my clear understanding of the issues relating to bicycle and pedestrian projects, and my already established professional networks within the agency, with stakeholders, and with cooperating agencies, makes me an ideal candidate for this position.

Since 2003, I have been working as a Project Manager in the Traffic Calming Program. In this capacity I manage the development and implementation of short and long-range plans, projects, and programs for the Traffic Calming Program. I manage transportation studies for neighborhood traffic calming projects, and present those findings at neighborhood meetings, informational functions, to departmental staff, various city commissions, and at public hearings. With these groups, I promote departmental goals and objectives, and advance the safety needs and concerns associated with traffic safety. I have also been responsible for successful grant funding applications and the execution of RFP's and Professional Services Contracts. I currently manage the coordination and project delivery of the Prop K 09/10 and 11/12 Traffic Calming Implementation Projects. I chair the community Projects Traffic Calming Implementation Coordination Team meetings, focusing on delivering projects that are completed within time and budget constraints. I also manage all traffic calming related work authorizations and construction coordination with outside agencies such as DPW, PUC and Rec and Park.

As a project manager in the community projects team, I excel at teamwork and consensus building within the agency, with stakeholders, and with elected officials. I am adept at communication with diverse constituencies. I am a creative problem solver who believes that finding effective solutions requires the ability to be flexible, identify and respect the needs of others, and remain open to new ideas. My ability to conceptualize projects from opposing stakeholder's positions helps me appreciate their perspective and develop strategies for agency and public acceptance of projects. Recent examples include the outreach and approval of the Upper Market Bike Lane Project, involving community members and district supervisors. I also lead the effort to change SFFD policy so that the city no longer needed to move fire hydrants when bulb-outs are constructed. This policy change has increased the entire city's ability to deliver critical pedestrian safety improvements and will save millions of dollars. I also have a strong understanding and appreciation of how bicycle and pedestrian projects affect transit, accessibility, and traffic operations.

My skills in developing positive professional working relationships with coworkers transfers naturally into my ability to being a effective team leader that this position requires. Currently in my role as the chair of the Community Projects Traffic Calming Implementation Coordination Team, I train staff on effective project delivery of traffic calming related projects. I have developed guidelines and trainings covering these specific aspects of traffic calming implementation; budget tracking, construction documents preparation, legislative approval processes, field survey and safety guide, managing official records, and the effective coordination with outside agencies for approval and construction coordination.

Please review the attached resume, which highlights additional specific skills and abilities that are required for this position. I appreciate your time and consideration, and I look forward to discussing my application in person.

Sincerely,

Adam Harris Gubser
5289 Transit Planner III
SFMTA | Municipal Transportation Agency
Traffic Calming Program Project Manager
1 South Van Ness Avenue, 7th Floor
San Francisco, CA 94103

Adam Harris Gubser
5289 Transit Planner III
SFMTA | Municipal Transportation Agency
Traffic Calming Program Project Manager
1 South Van Ness Avenue, 7th Floor
San Francisco, CA 94103-5417
Phone: 415.701.4465
Fax: 415.701.4343
E-mail: Adam.Gubser@sfmta.com

Highlights of Qualifications:

- Excellent interpersonal communication, networking, and coalition-building skills.
- Adept in understanding project management, government and organizational policymaking.
- Highly skilled and motivated in promoting public education, public awareness and community building.
- Strong ability to conceptualize projects and develop strategies for agency and public acceptance of projects.

Experience:

City and County of San Francisco Municipal Transportation Agency – Sustainable Streets Division

Transit Planner III Traffic Calming Program Project Manager and Community Projects Team Member

9/2003 - Present

- Develop and implement short and long-range plans, projects and programs in relation to Traffic Calming, Pedestrian Safety and Bicycle Projects.
- Conduct transportation and land use studies for Traffic Calming, Pedestrian Safety and Bicycle Projects.
- Direct neighborhood meetings and informational functions, and make oral presentations to Commissions and at Public Hearings, managed the design and preparation of maps and other graphic materials to illustrate proposals and plans for transportation projects
- Provide information on department goals and objectives, and promote the safety needs and concerns associated with traffic safety.
- Performed professional research and analysis on a variety of transportation projects such as; New Fire Hydrant Policy, Coordination of Traffic Calming Speed Cushion investigation with Muni and participation in traffic calming effectiveness analysis.
- Project Delivery and Budget Management Skills: Effectively managing the budget and coordinating construction efforts with partner agencies for all 09/10 and 11/12 TC related projects, Routinely checking balances, preparing construction documents and managing all Work Authorizations from the Community Projects Team.
- Lead on many staff team professional development trainings, including; field survey techniques; preparation of construction documents; staff project review and legislative process; and budget tracking.
- Successful project delivery on a wide range of multi-agency project types, such as; Newcomb Model Block Project (PUC, Redevelopment); Linden Living Alley Shared Roadway/Home Zone Project (DPW, SFFD, Mayors Office, District Supervisor) and Jamestown Street redesign (Mayors Office).

Transit Planner III Red Light Camera Photo Enforcement Program Manager 10/01/2002 - 9/2003

- Conducted evaluation and analysis of current program, and implemented changes to ensure best fiscal efficiency and public safety.
- Developed and implemented budget for program and projects.
- Negotiated contracts with vendors and oversaw program implementation by participating contractors and agencies.
- Assisted in developing legislation and policy to be presented by local and state legislative bodies.

Transit Planner III School Area Safety Program Manager 04/18/2001 - 10/01/2002

- Directed, planned and coordinated city policy for newly established school traffic safety program.
- Managed implementation of high visibility safety markings and signage features at dozens of school sites, tasks also included budget development/oversight.
- Reported progress in written and oral reports within department, and to local, state, and federal funding agencies.
- Facilitated healthy communications among various community groups and city departments.
- Represented program at community meetings, with elected officials, and with media.
- Developed, implemented, and managed the city's participation in 'International Walk to School Day.'
- Managed personnel and summer interns.

Transit Planner II Assistant Bicycle Program Manager 02/01/1999 - 04/18/2001

Transit Planner I Assistant Bicycle Program Manager 03/01/1997 - 02/01/1999

- Developed RFP's, managed contract award process, and oversaw project completion.
- Developed projects and materials and managed CCSF implementation of annual 'Bike to Work Day' efforts.
- Presented papers at national bicycle and pedestrian conferences.
- Represented program at community meetings, with elected officials, and with media.
- Responded with both letters and phone calls to inquiries on program made by the general public.
- Developed and implemented bicycle safety education programs for bicyclists and motorists, including assisting with the development and publication of city's first Bicycle Plan.
- Managed City's bicycle rack installation program.
- Conducted field investigations and prepared written reports using maps, sketches, and photographs.
- Assisted with hiring and training of additional personnel.
- Managed professional development training authorization and scheduling for all personnel in DPT Traffic Engineering Division.

Student Engineer 1-3, Assistant Bicycle Program Manager 01/01/1996 - 03/01/1997

- Prepared grant proposals, funding requests, contracts, RFPs and other documents.
- Wrote letters, press releases, and other documents outlining department policies and activities.
- Conducted field surveys and prepared written recommendations and site drawings.
- Attended Parking & Traffic Commission and Housing & Neighborhood Services Committee hearings, and helped prepare presentations for hearings.
- Conduct transportation and land use studies for locating bicycle facilities such as bike lanes, racks and lockers to effectively meet the needs of bicycle commuters.

County of Los Angeles Fire Department

Ocean Rescue and Emergency Medical Technician

June 1987 - August 1995

- Assigned to perform Ocean Rescue and Emergency Medical Technician response services to public.
- Managed and taught ocean and emergency safety skills youth program ages 14-17.

Education:

BA History/ Urban Studies Minor

San Francisco State University, 1/96

With additional course work in transportation, land- use planning, regional and urban geography

Northwestern University Traffic Institute, 4/98

Pedestrian Planning and Facilities Wksp. - 1.5 units

Bicycle Planning and Facilities Wksp. - 2.0 units

UC Berkeley Extension 9/96

Integrating Bicycle Planning and Engineering Issues into Everyday Practices 1.6 units

UC Berkeley Extension 6/97

Fundamentals of Traffic Engineering - 4 units

UC Berkeley Extension 6/97

Walkable Communities: Designing for Pedestrians 1.6 units

FHWA Resource Center 5/08

Planning and Designing Streets for Pedestrian Safety 3.0 units



Board of Supervisors
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, Room 244
(415) 554-5184 FAX (415) 554-7714

Application for Boards, Commissions and Committees

Application for Appointment to: Citizens' General Obligation Bond Oversight Committee
Name of Board, Commission, Committee, or Task Force

Seat # or Category (If applicable): Seats 1 and 3 District: 6

Name: Kevin W. Harper

Home Address: 1 Howard Street #909 Zip: 94105

Home Phone: Occupation: Certified Public Accountant

Work Phone: 510-593-5037 Employer: Kevin W. Harper CPA & Associates

Business Address: 20885 Redwood Road #202, Castro Valley, CA Zip: 94546

Business E-Mail: kharper@kevinharpercpa.com Home E-Mail:

Check All That Apply:

A citizen of the United States. [X] At least 18 years old on or before Election Day. [X]

Not in prison or on parole for a felony conviction [X]

A resident of San Francisco [X] Yes: [] No: (Place of Residence):

Please state your qualifications (attach supplemental sheet if necessary)

30 years experience providing audit and financial consulting services to cities and counties. Led Deloitte's California government audit practice many years before starting my own firm serving cities and counties. See attached resume.

Education:

California certified public accountant. BS in accounting from CSU Fresno (summa cum laude).

Business and/or professional experience:

Conducted more than 300 financial, compliance and management audits for cities and counties. Served as interim finance director for City of Fremont and East Bay Regional Park District.

Civic Activities:

Served as elected school board trustee for New Haven Unified Schools and elected Auditor for City of Alameda. Served on many boards and commissions including Union City Budget Advisory, Mission Valley ROP

Ethnicity: (optional) Sex: (optional) [X] M [] F

Have you attended any meetings of the Board/Commission to which you wish appointment? [X] Yes [] No

For appointments by the Board of Supervisors, appearance before the RULES COMMITTEE is a requirement before any appointment can be made. (Applications must be received 10 days before the scheduled hearing.) (Please Note: Once Completed, this form, including all attachments, become public record)

Date: 8/30/12 Applicant's Signature: (required) Kevin Harper

Please Note: Your application will be retained for one year.

FOR OFFICE USE ONLY:

Appointed to Seat #: Term Expires: Date Seat was Vacated:

Kevin W. Harper Profile

Kevin is a California CPA with 30 years of professional experience, entirely in service to local government. For many years he led Deloitte & Touche's Northern California Public Sector practice, where he was responsible for the quality of their services to all Northern California public sector clients. He has performed over 300 financial, management and operational audits for local governments. He has worked with dozens of local governments, providing auditing, consulting and interim financial management services.

Kevin has served as an elected official, on the New Haven Unified School District Board of Trustees and as elected City Auditor of the City of Alameda. Kevin has also served in interim financial management positions for numerous local governments, including:

- Chief Financial Officer, East Bay Regional Park District
- Finance Director, City of Fremont
- Controller, San Mateo County Medical Center
- Accounting Officer, City of Sunnyvale
- Internal Audit Manager, Port of Oakland
- Controller, San Francisco Creek Joint Powers Authority

He has also served on several boards and commissions including Union City's Budget Advisory Committee (chair), Chabot-Las Positas Community Colleges Foundation Board (president), Oakland Chamber of Commerce (treasurer), Alameda County Transportation Improvement Authority's Citizens Watchdog Committee, Mission Valley Regional Occupation Program (chair), San Francisco's Citizens Advisory Committee on Wastewater and City of Alameda's Strategic Planning Advisory Committee.

His experience includes all aspects of governmental financial management including accounting, financial reporting, budgeting, debt financing, pension oversight, process design, risk management and treasury functions. Kevin also brings a unique knowledge of public sector information systems to his clients, having spent two years working with PeopleSoft in the Education and Government practice of PeopleSoft Consulting.

He is a member of the Government Finance Officers Association's Special Review Committee that performs reviews of comprehensive annual financial reports for the Certificate of Achievement in Financial Reporting award. He is also a member of the American Institute of Certified Public Accountants, California Society of Municipal Finance Officers and the California Society of Certified Public Accountants.

Kevin is a frequent speaker at meetings of public sector finance officers. For example, he has addressed the California Society of Municipal Finance Officers, the California Municipal

— Redwood Road #202, Castro Valley, CA 94546
(510) — kharper@kevinharpercpa.com

Treasurers' Association, the State Association of County Auditor Controllers and the Nevada Government Finance Officers Association. He has also published several articles about local government administrative operations, including:

- The Rising Cost of Pollution: Implementing GASB Statement 49 at the Port of Oakland (GFOA's Government Finance Review)
- Risk and Control: What Local Governments Can Learn from Corporate Accounting Scandals (Municipal World)
- Risking it All: Assessing Risk in System Implementation Projects (Municipal World)
- Anatomy of a Deep Discount Bond (Pension World)
- Saving Dollars by Managing Risk (American City and County)
- Pollution Remediation Costs on the Rise: GASB 49's New Requirements (ICMA's Public Management)
- Exceptional Customer Service by Administrative Services Departments (California Society of Municipal Finance Officers Mini News).

Following is a partial list of local governments that Kevin has worked with:

Municipalities

Sunnyvale
Fremont
Oakland
Palo Alto
Richmond
Santa Rosa
Woodside
Monterey
Foster City
San Rafael
Dublin
Millbrae
Hercules
Hayward
Saratoga
Los Altos Hills
Alameda
Newark
Benicia
Emeryville
Novato

Counties

Alameda
Solano
San Mateo
Napa
Contra Costa
Clark (NV)

Schools

Santa Clara County Office of Education
Hayward Unified School District
Peralta Community College District
Oakland Unified School District
Mt. Diablo Unified School District
San Francisco Community College District
Contra Costa Office of Education
San Jose-Evergreen Community College District
San Francisco Unified School District

Other

Santa Clara County Transit District
Alameda County Transportation Commission
Association of Bay Area Governments
Port of Oakland
Port of Redwood City
Union Sanitary District
Golden Gate Bridge, Highway and Transportation District
Contra Costa County Transportation Authority
East Bay Regional Park District
Solano Transportation Authority
Muir Beach Community Services District
Western Contra Costa Transit Authority
Alameda County Congestion Management Agency
Alameda County Children and Families Commission
Santa Clara Transportation Authority
San Mateo Medical Center
First 5 Alameda County
San Francisquito Creek Joint Powers Authority

Santa Clara

Following is a partial list of internal audit type projects that he has performed for public sector clients:

- **Alameda County** – Assisted several County departments and component units to implement new GASB accounting requirements, including Alameda County Redevelopment Agency, Alameda County Community Development Commission, Alameda County Lead Abatement Program and Alameda County Children and Families Commission
- **Alameda County Health Services Agency** – Conducted financial review of a large community health clinic including review of cash flow projections, cost controls, profitability by service line and grants management
- **San Mateo County Medical Center** – Served as interim Controller, conducted internal audits of cash collections and patient trust accounting, assisted in year-end close and preparation of annual financial statements, developed cash flow reporting and wrote various policies and procedures
- **San Francisco Unified School District** – Served as accounting department for Facilities Design and Construction Department, which is managing \$1 billion bond and construction program. Developed process for managing District-wide grant program for over 300 categorical grants totaling \$100 million. Financial analysis for developer fees class action lawsuit
- **Port of Oakland** – Reviews of procedures and controls over payables, receivables, airport rates and charges, capital improvement program, maintenance supplies and internal accounting controls
- **Alameda County Congestion Management Agency** – Assessment of finance and administrative processes and systems to ascertain their capability to support growth resulting from large new funding source
- **County of Contra Costa** – Compilation of financial statements for the Public Financing Authority and Public Facilities Corporation, project close out audit of juvenile hall building
- **City of Sunnyvale** – Review of accounts payable, collections and purchasing card processes
- **State Bar of California** – Review of government-wide risks and controls, review of fraud loss and related control improvements, cash receipts control workshops
- **California Bureau of State Audits** – Review of fraud detection and prevention procedures of the Food Stamp Program
- **City of Dublin** – Review of administrative services department, project management for cost allocation and user fee study
- **San Francisquito Creek Joint Powers Authority** – Consultation related to the Authority setting up initial accounting records, financial policies, procedures and controls
- **City of Berkeley** – Developed City-wide cash handling training manual
- **City of Benicia** – Review of suspected fraud at grant subrecipient

- ***City of Alameda*** – Review of cash collection procedures in 10 departments, calculation of cost of manual checks, assessment of need for finance committee, review of payroll procedures and controls
- ***Santa Clara Valley Water District*** – Assisted in development of process for evaluating financial strength of construction contractors during RFP process
- ***Golden Gate Bridge, Highway and Transportation District*** – Review of major financial controls
- ***City of North Las Vegas*** – Review of financial controls and procedures in the public works department
- ***California Department of Parks and Recreation*** – Review of suspected fraud at the Asilomar Conference Resort
- ***San Francisco Community College District*** – Litigation support related to allegations of financial mismanagement by a citizen's group
- ***Alameda Municipal Golf Courses*** – Review of problems with software implementation and review of cash handling procedures
- ***City of Oakland*** – Reviews of workers compensation procedures, risk management procedures and police overtime
- ***City of Saratoga*** – Review of status of the accounting records and competence of the accounting supervisor
- ***City of Fremont*** – Selection of banking services contractor, review of cost accounting records of AC Transit to determine whether city received value commensurate with contributions
- ***East Bay Regional Park District*** – Contract negotiations with East Bay Municipal Utility District and Port of Oakland related to cost of providing police services and with the police officer union, implementation of Bank of America DirectPay, preparation of annual budget
- ***Sacramento Sanitation District*** – Assisted in preparation of first comprehensive annual financial report
- ***Jefferson Elementary School District*** – Analyzed prior year ending balances and current year awards for receipts and budgets, prepared report showing available resources for all categorical programs, assisted in the development of mid-year budget adjustments for categorical programs
- ***San Francisco Recreation & Parks*** – Made recommendations for improvement in recordkeeping and request for reimbursement processes



**Board of Supervisors
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, Room 244
(415) 554-5184 FAX (415) 554-7714**

Application for Boards, Commissions, Committees, & Task Forces

Name of Board, Commission, Committee, or Task Force: Citizens' General Obligation Bond Oversight Committee

Seat # or Category (If applicable): Seat 1 or Seat 3 District: _____

Name: Sabrina F. Lowell

Home Address: Broadway Street, #416 SF, CA Zip: 94115

Home Phone: 415-_____ Occupation: Financial Planner

Work Phone: 415-788-1952 Employer: Mosaic Financial Partners, Inc.

Business Address: 140 Geary Street, FL 6, SF, CA Zip: 94108

Business E-Mail: Sabrina@MosaicFP.com Home E-Mail: _____@hotmail.com

Pursuant to Charter Section 4.101 (a)2, Boards and Commissions established by the Charter must consist of electors (registered voters) of the City and County of San Francisco. For certain other bodies, the Board of Supervisors can waive the residency requirement.

Check All That Apply:

Registered voter in San Francisco: Yes No If No, where registered: _____

Resident of San Francisco Yes No If No, place of residence: _____

Pursuant to Charter section 4.101 (a)1, please state how your qualifications represent the communities of interest, neighborhoods, and the diversity in ethnicity, race, age, sex, sexual orientation, gender identity, types of disabilities, and any other relevant demographic qualities of the City and County of San Francisco:

As a long term resident of San Francisco, participating on a committee that helps oversee the timeliness, scope, and budget for general obligation bond projects relating to city improvement is appealing. Project management and oversight aligns with my professional work and volunteer experiences. The perspective I bring to the table is that of a young, female professional who routinely utilizes local public services (parks, roads, library, hospital, emergency, safety, etc.). In reviewing the Vacancy Notice for the CGOBOC committee, I would qualify for Seat 1 (representing the business community located within the City, Mosaic Financial Partners, Inc. a small business within San Francisco) or Seat 3 (active in a community organization, The Junior League of San Francisco which is a 501c(3)).

Business and/or professional experience:

I have worked in the Financial Planning industry for 10 years, joining Mosaic Financial Partners in 2002. In my work with clients, many of whom are small business owners, I specialize in cash flow planning, debt management, portfolio construction and investment management, along with the development and integration of equity compensation strategies including corporate stock options, restricted stock, stock appreciation rights. The work I do with clients involves developing a framework to make informed decisions during times of transition. I am a CFP® certificant, hold a BA in business from Principia College, a Certificate in Personal Financial Planning from the UC Berkeley Personal Financial Planning Program, and have taken classes through Golden Gate University towards a Master's in Taxation.

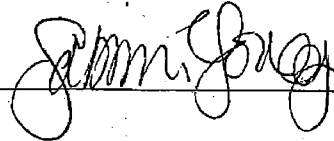
Civic Activities:

I have been actively involved in The Junior League of San Francisco for 7 years and have served on their Board of Directors for the past 2 years. I've given financial planning presentations pro bono for Earned Asset Resource Network (EARN), have served as a Mentor for the "SF FPA Practicum Project" supervising financial planning students to prepare plans for the working poor, and volunteer annually for San Francisco Financial Planning Days designed to unite the collective resources of the financial planning community and city governments assist Americans in need of financial guidance through a series of free Financial Planning Day events. I am also actively involved in the Financial Planning Association (FPA), the leadership and advocacy organization representing the financial planning community. As a long standing member of the FPA I've twice Chaired the local FPA NorCal Conference (2010, 2011) and have served in a number of capacities on FPA National Committees/Conferences.

Have you attended any meetings of the Board/Commission to which you wish appointment? Yes No

For appointments by the Board of Supervisors, appearance before the RULES COMMITTEE is a requirement before any appointment can be made. (*Applications must be received 10 days before the scheduled hearing.*)

Date: 2/25/2013 Applicant's Signature: (required)



Please Note: Your application will be retained for one year. Once Completed, this form, including all attachments, become public record.

FOR OFFICE USE ONLY:

Appointed to Seat #: _____ Term Expires: _____ Date Seat was Vacated: _____

01/20/12

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Board of Supervisors
City and County of San Francisco
1 Dr. Carlton B. Goodlett Place, Room 244
(415) 554-5184 FAX (415) 554-7714

Application for Boards, Commissions, Committees, & Task Forces

Name of Board, Commission, Committee, or Task Force: CITIZENS' GENERAL OBLIGATION BOND OVERSIGHT COMMITTEE

Seat # or Category (If applicable): BUSINESS^① / COMMUNITY^③ District: 2

Name: WILLIAM G. BOWEN

Home Address: MALLORCA WAY, SF CA Zip: 94123

Home Phone: (415) _____ occupation: AUTHOR / INVESTMENT MANAGER

Work Phone: (415) 776-4244 Employer: SELF

Business Address: 278 MALLORCA WAY, SF CA Zip: 94123

Business E-Mail: bhowen7@COMCAST.NET Home E-Mail: _____@COMCAST.NET

Pursuant to Charter Section 4.101 (a)2, Boards and Commissions established by the Charter must consist of electors (registered voters) of the City and County of San Francisco. For certain other bodies, the Board of Supervisors can waive the residency requirement.

Check All That Apply:

Registered voter in San Francisco: Yes No If No, where registered: _____

Resident of San Francisco Yes No If No, place of residence: _____

Pursuant to Charter section 4.101 (a)1, please state how your qualifications represent the communities of interest, neighborhoods, and the diversity in ethnicity, race, age, sex, sexual orientation, gender identity, types of disabilities, and any other relevant demographic qualities of the City and County of San Francisco:

All COMMUNITIES IN SAN FRANCISCO
BENEFIT FROM THE PRUDENT MANAGEMENT
OF GOVERNMENT FUNDS.

Business and/or professional experience:

- VICE PRESIDENT - PABST BREWING COMPANY AND KRAFT FOODS
- INVESTMENT MANAGEMENT - FAMILY ACCOUNTS
- BUSINESS ASPECTS OF PUBLISHING/SELLING BOOKS

Civic Activities: (SEE ATTACHED BIOGRAPHY)

- SECRETARY/TREASURER OF OAKLAND MILITARY INSTITUTE. (FOUNDED BY MAYOR JERRY BROWN)
- FOREMAN OF SAN FRANCISCO CIVIL GRAND JURY
- PRESIDENT OF SF CHAPTER OF CALIFORNIA GRAND JURORS' ASSOCIATION

Have you attended any meetings of the Board/Commission to which you wish appointment? Yes No

For appointments by the Board of Supervisors, appearance before the RULES COMMITTEE is a requirement before any appointment can be made. (Applications must be received 10 days before the scheduled hearing.)

Date: 3/11/13 Applicant's Signature: (required) William H. Bowen

Please Note: Your application will be retained for one year. Once Completed, this form, including all attachments, become public record.

FOR OFFICE USE ONLY:

Appointed to Seat #: _____ Term Expires: _____ Date Seat was Vacated: _____

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William G. (Bill) Bowen
— Mallorca Way
San Francisco, CA 94123
(415) —
— @comcast.net

Education

- USAF Academy – Bachelor of Science (1966)
- Georgetown University – MA (Political Science; 1967)

Military Experience

- Air Force Intelligence Officer – Vietnam (1967-1968); Defense Intelligence Agency – Washington, D.C. (1968-1970)
- Staff Officer – Office of the Secretary of Defense/International Security Affairs – (1970-1972)

Business Experience

- Pabst Brewing Company, Milwaukee Wisconsin – VP Logistics; Information Systems; Strategy; Personnel. (1972-1985)
- Kraft Foods, Northbrook, Illinois – VP Logistics; Purchasing; Operations Strategy (1985-1998)
- Investment Management – Family Accounts (1998 – present)
- Author – publishing / sales (2009 – present)

Other Interests

- Glendale Wisconsin Board of Education (1974 - 1980)
- Service Core of Retired Executives - Consultant (1999 – 2001)
- San Francisco Civil Grand Jury - Foreman (2001 - 2002)
- SF Chapter, California Grand Jurors' Association (2004-present; President – 2004 - 2007)
- Presidio Golf Club (President, 2006)
- Sacramento Seminar (1999 - present)
- Lincoln Club of Northern California (2010 – present; Board Member 2012-present)
- Oakland Military Institute College Preparatory Academy Board of Directors (2010 – present; Secretary, Treasurer)
- San Francisco GOP Central Committee (2011 - present); Secretary 2013
- Professor at the Fromm Institute at the University of San Francisco; co-lecturer, *The 2012 Presidential Election* (2012)
- Author of nuclear terrorism thriller, *The Target*

Personal

- Wife – Susan; daughters Sarah and Julia; 5 grandchildren

5 of 11

Date Received
Official Use Only

STATEMENT OF ECONOMIC INTERESTS COVER PAGE

Please type or print in ink.

NAME OF FILER	(LAST)	(FIRST)	(MIDDLE)
Bowen	William		Garland

1. Office, Agency, or Court

Agency Name
Citizens General Obligation Bond Oversight Committee

Division, Board, Department, District, if applicable
Your Position
Committee Member

► If filing for multiple positions, list below or on an attachment.

Agency: _____ Position: _____

2. Jurisdiction of Office (Check at least one box)

State Judge or Court Commissioner (Statewide Jurisdiction)

Multi-County _____ County of San Francisco

City of San Francisco Other _____

3. Type of Statement (Check at least one box)

Annual: The period covered is January 1, 2012, through December 31, 2012.

Leaving Office: Date Left _____ (Check one)

The period covered is January 1, 2012, through the date of leaving office.

The period covered is _____ through the date of leaving office.

Assuming Office: Date assumed _____

Candidate: Election year 2013 and office sought if different than Part 1: _____

4. Schedule Summary

Check applicable schedules or "None."

► Total number of pages including this cover page: _____

Schedule A-1 - Investments - schedule attached Schedule C - Income, Loans, & Business Positions - schedule attached

Schedule A-2 - Investments - schedule attached Schedule D - Income - Gifts - schedule attached

Schedule B - Real Property - schedule attached Schedule E - Income - Gifts - Travel Payments - schedule attached

None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS	STREET	CITY	STATE	ZIP CODE
or Agency Address Recommended - Public Document				
<u>MALIBU WAY</u>		<u>San Francisco</u>	<u>CA</u>	<u>94123</u>
DAYTIME TELEPHONE NUMBER	E-MAIL ADDRESS (OPTIONAL)			
<u>(415) _____</u>	<u>@comcast.net</u>			

I have used reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed 3/11/13
(month, day, year)

Signature William H. Bowen
(The originally signed statement with your filing official.)

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SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

Name

▶ NAME OF BUSINESS ENTITY
CAMDEN PROPERTIES

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
REIT

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
9 / 11 / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
CORNING INC

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
GLASS MANUFACTURER

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
7 / 25 / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
CANADIAN NATIONAL RR

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
RAILROAD

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
FORD MOTOR CO

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
AUTOMOTIVE MANUFACTURE

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
CERNER CORP

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
HEALTH CARE IT

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
HEALTH CARE PROPERTIES

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
REAL ESTATE

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

Comments: _____

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SCHEDULE A-1 Investments

Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

Name

▶ NAME OF BUSINESS ENTITY
IBM

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
INFORMATION TECHNOLOGY

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
MMM

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
DIVERSIFIED MANUFACTURER

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
JOHNSON + JOHNSON

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
HEALTH CARE

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 1 / 11 / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
MONSANTO

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
CHEMICAL MANUFACTURER

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 1 / 19 / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
KINDER MORGAN INC

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
PIPELINE OPERATOR

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 1 / 4 / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
NATIONAL OILWELL VARCO

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
OILFIELD SUPPLIER

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 12 / 3 / 12 _____ / _____ / 12
 ACQUIRED DISPOSED

Comments: _____

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SCHEDULE A-1
Investments
Stocks, Bonds, and Other Interests
 (Ownership Interest is Less Than 10%)
Do not attach brokerage or financial statements.

Name _____

▶ NAME OF BUSINESS ENTITY
NEXT ERA ENERGY
 GENERAL DESCRIPTION OF BUSINESS ACTIVITY
UTILITY

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____/_____/12 _____/_____/12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
TEVA PHARMACEUTICAL
 GENERAL DESCRIPTION OF BUSINESS ACTIVITY
GENERIC PHARMA MFG

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____/_____/12 _____/_____/12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
ORACLE
 GENERAL DESCRIPTION OF BUSINESS ACTIVITY
INFO TECH

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____/_____/12 _____/_____/12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
TORONTO DOMINION BANK
 GENERAL DESCRIPTION OF BUSINESS ACTIVITY
BANKING

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
10/3/12 _____/_____/12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
SEADRILL
 GENERAL DESCRIPTION OF BUSINESS ACTIVITY
OIL/GAS PRODUCER

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____/_____/12 _____/_____/12
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
TRANSCANADA PIPELINE
 GENERAL DESCRIPTION OF BUSINESS ACTIVITY
PIPELINE OPERATOR

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____/_____/12 _____/_____/12
 ACQUIRED DISPOSED

Comments: _____

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SCHEDULE A-1

Investments

Stocks, Bonds, and Other Interests

(Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

Name _____

NAME OF BUSINESS ENTITY
VERIZON COMMUNICATIONS

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
TELEPHONE SERVICES

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
7/5/12 ____/____/12
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY
TIPS

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
TREASURY BONDS

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other BONDS (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 ____/____/12 ____/____/12
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY
WALMART

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
RETAILER

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
2/21/12 ____/____/12
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY
Schwab Money Market Funds

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
MONEY MARKET FUNDS

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other MONEY MARKET FUNDS (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 ____/____/12 ____/____/12
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY
Coast Capital Income Fund

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
REAL ESTATE MORTGAGES

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____ (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 ____/____/12 ____/____/12
 ACQUIRED DISPOSED

NAME OF BUSINESS ENTITY
Vanguard Money Market Funds

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
MONEY MARKET FUNDS

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other MONEY MARKET FUNDS (Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 ____/____/12 ____/____/12
 ACQUIRED DISPOSED

Comments: _____

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SCHEDULE A-2

Investments, Income, and Assets of Business Entities/Trusts

(Ownership Interest is 10% or Greater)

Name _____

Name BILL BOWEN AUTHOR

Address (Business Address Acceptable) 278 MALIBUCA WAY, SF CA

Check one
 Trust, go to 2 Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
SELLING OF NOVEL

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
 \$0 - \$1,999 / / 12 / / 12
 \$2,000 - \$10,000 ACQUIRED DISPOSED
 \$10,001 - \$100,000
 \$100,001 - \$1,000,000
 Over \$1,000,000

NATURE OF INVESTMENT
 Partnership Sole Proprietorship Other

YOUR BUSINESS POSITION OWNER

Name _____

Address (Business Address Acceptable) _____

Check one
 Trust, go to 2 Business Entity, complete the box, then go to 2

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
 \$0 - \$1,999 / / 12 / / 12
 \$2,000 - \$10,000 ACQUIRED DISPOSED
 \$10,001 - \$100,000
 \$100,001 - \$1,000,000
 Over \$1,000,000

NATURE OF INVESTMENT
 Partnership Sole Proprietorship Other

YOUR BUSINESS POSITION _____

\$0 - \$499 \$10,001 - \$100,000
 \$500 - \$1,000 OVER \$100,000
 \$1,001 - \$10,000

\$0 - \$499 \$10,001 - \$100,000
 \$500 - \$1,000 OVER \$100,000
 \$1,001 - \$10,000

None
SALES IN SAN FRANCISCO
LESS THAN \$100

None

Check one box:
 INVESTMENT REAL PROPERTY

Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property _____

Description of Business Activity or City or Other Precise Location of Real Property _____

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
 \$2,000 - \$10,000 / / 12 / / 12
 \$10,001 - \$100,000 ACQUIRED DISPOSED
 \$100,001 - \$1,000,000
 Over \$1,000,000

NATURE OF INTEREST
 Property Ownership/Deed of Trust Stock Partnership

Leasehold _____ Other _____
Yrs. remaining

Check box if additional schedules reporting investments or real property are attached

Check one box:
 INVESTMENT REAL PROPERTY

Name of Business Entity, if Investment, or Assessor's Parcel Number or Street Address of Real Property _____

Description of Business Activity or City or Other Precise Location of Real Property _____

FAIR MARKET VALUE IF APPLICABLE, LIST DATE:
 \$2,000 - \$10,000 / / 12 / / 12
 \$10,001 - \$100,000 ACQUIRED DISPOSED
 \$100,001 - \$1,000,000
 Over \$1,000,000

NATURE OF INTEREST
 Property Ownership/Deed of Trust Stock Partnership

Leasehold _____ Other _____
Yrs. remaining

Check box if additional schedules reporting investments or real property are attached

Comments: _____

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SCHEDULE C
Income, Loans, & Business
Positions
 (Other than Gifts and Travel Payments)

Name _____

NAME OF SOURCE OF INCOME
FRIENDS OF THE FROMM INSTITUTE

ADDRESS (Business Address Acceptable)
EDUCATION

BUSINESS ACTIVITY, IF ANY, OF SOURCE
LARKSPUR, CA

80 E. SIR FRANCIS DRIVE; 54104939

YOUR BUSINESS POSITION
PROFESSOR

GROSS INCOME RECEIVED
 \$500 - \$1,000 \$1,001 - \$10,000
 \$10,001 - \$100,000 OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED
 Salary Spouse's or registered domestic partner's income
 Loan repayment Partnership
 Sale of _____
(Real property, car, boat, etc.)
 Commission or Rental Income, list each source of \$10,000 or more
 Other _____
(Describe)

NAME OF SOURCE OF INCOME _____

ADDRESS (Business Address Acceptable) _____

BUSINESS ACTIVITY, IF ANY, OF SOURCE _____

YOUR BUSINESS POSITION _____

GROSS INCOME RECEIVED
 \$500 - \$1,000 \$1,001 - \$10,000
 \$10,001 - \$100,000 OVER \$100,000

CONSIDERATION FOR WHICH INCOME WAS RECEIVED
 Salary Spouse's or registered domestic partner's income
 Loan repayment Partnership
 Sale of _____
(Real property, car, boat, etc.)
 Commission or Rental Income, list each source of \$10,000 or more
 Other _____
(Describe)

* You are not required to report loans from commercial lending institutions, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER _____

ADDRESS (Business Address Acceptable) _____

BUSINESS ACTIVITY, IF ANY, OF LENDER _____

HIGHEST BALANCE DURING REPORTING PERIOD
 \$500 - \$1,000
 \$1,001 - \$10,000
 \$10,001 - \$100,000
 OVER \$100,000

INTEREST RATE _____% None

TERM (Months/Years) _____

SECURITY FOR LOAN
 None Personal residence
 Real Property _____
Street address

City
 Guarantor _____
 Other _____
(Describe)

Comments: _____



Board of Supervisors
 City and County of San Francisco
 1 Dr. Carlton B. Goodlett Place, Room 244
 (415) 554-5184 FAX (415) 554-7714

RECEIVED
 BOARD OF SUPERVISORS
 SAN FRANCISCO

2012 SEP 13 AM 9:19

Application for Boards, Commissions and Committees

Ak

Application for Appointment to: Citizens General Obligation Bond Oversight Committee
 Name of Board, Commission, Committee, or Task Force

Seat # or Category (If applicable): 3

District: 7

Name: Jonathan Alloy

Home Address: — Clairview Court, San Francisco, CA

Zip: 94131

Home Phone: 415 —

Occupation: Vice President and Product Manager

Work Phone: 415-396-8251

Employer: Wells Fargo Bank

Business Address: 525 Market St, Floor 5, MAC A0103-051, San Francisco, CA

Zip: 94105

Business E-Mail: jonathan.alloy@wellsfargo.com

Home E-Mail: — @gmail.com

Check All That Apply:

A citizen of the United States.

At least 18 years old on or before Election Day.

Not in prison or on parole for a felony conviction

A resident of San Francisco Yes: No: (Place of Residence):

Please state your qualifications (attach supplemental sheet if necessary)

Please see attached.

Education:

Please see attached.

Business and/or professional experience:

Please see attached.

Civic Activities:

Please see attached.

Ethnicity: (optional)

Sex: (optional) M F

Have you attended any meetings of the Board/Commission to which you wish appointment? Yes No

For appointments by the Board of Supervisors, appearance before the RULES COMMITTEE is a requirement before any appointment can be made.

(Applications must be received 10 days before the scheduled hearing.)

(Please Note: Once Completed, this form, including all attachments, become public record)

Date: 9/4/12 Applicant's Signature: (required)

Jonathan Alloy

Please Note: Your application will be retained for one year.

FOR OFFICE USE ONLY:

Appointed to Seat #: _____ Term Expires: _____ Date Seat was Vacated: _____

JONATHAN ALLOY

Clairview Ct, San Francisco, CA 94131 • 415 _____ @gmail.com

Business and community leader with an MBA and extensive cross-functional experience managing people and complex programs to deliver strategic and tactical results.

CAREER

WELLS FARGO BANK **San Francisco, CA**
Vice President and Product Manager, Debit Card Marketing **2007-Present**

- Lead cross-functional nationwide teams to increase consumer and small business engagement across a 35-million customer portfolio; manage complex marketing and social media initiatives that enhance customers' experience and encourage preferential usage – including Wells Fargo's first product-centric Facebook app, for photo personalization of debit/credit cards; direct substantial technology and systems improvement projects; develop strategic growth plans and translate to business cases for execution; and manage people directly and with influence. Certified Financial Marketing Professional (09-12) and Visa Bankcard Management School.

LAM RESEARCH CORPORATION **Fremont, CA**
Senior Project Manager **2006-2007**

- Led supply chain initiatives with cutting-edge American manufacturers to rapidly prototype and pilot new technology for next-generation semiconductor equipment, while meeting aggressive cost targets.

DUPONT **Wilmington, DE**
Environmental Sustainability, Marketing and Strategy Manager **2003-2006**

- Completed global assignments including managing an executive business restructuring team; positioning home improvement and agricultural brands for environmentally responsible growth – including presenting a sustainable growth model to CxO leaders; and recruiting and mentoring new hires for the Marketing Leadership Development Program. Six Sigma Green Belt and LEED Accredited Professional certifications.

3M **St. Paul, MN**
Brand Marketing MBA Intern **2002**

- Designed consumer marketing promotions to raise awareness and trial of home improvement brands.

POTOMAC COMMUNICATIONS GROUP **Washington, DC**
Program Manager **1996-2001**

- Built Public Sector Practice by signing and counseling new clients in growth markets; managing diverse national teams; and creating public relations campaigns on energy efficiency, adult education and other topics.

COMMUNITY LEADERSHIP

City of San Francisco – Vice Chair, Citizens General Obligation Bond Oversight Committee **2011-Present**

- Appointed to oversee \$2.7 billion in municipal bonds and SF's whistleblower and audit programs, and manage a \$1 million budget. Liaison to \$412 million Earthquake Safety and Emergency Response Bond.

JVS.org – Communications Committee and Volunteer **2009-Present**

Southern California Leadership Network – California Connections Fellowship **Class of 2012**

Leadership San Francisco – Graduate **Class of 2011**

Noe Valley Farmers Market – President, Board of Directors and Volunteer **2006-2011**

Pacific Heights Residents Association – Board of Directors **2010**

Coalition for San Francisco Neighborhoods – Delegate **2010**

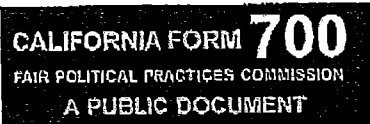
EDUCATION

UNIVERSITY OF MICHIGAN, ANN ARBOR **MBA** **2003**

- U.S. Presidential Management Fellowship Finalist

FROSTBURG STATE UNIVERSITY **BS with Honors** **1995**

- MD Governor's Summer Internship Program; and Legislative Office Assistant, Maryland General Assembly



STATEMENT OF ECONOMIC INTERESTS COVER PAGE

Date Received Official Use Only

Please type or print in ink.

NAME OF FILER (LAST) (FIRST) (MIDDLE) Alloy Jonathan Tai

1. Office, Agency, or Court

Agency Name Citizens General Obligation Bond Oversight Committee Division, Board, Department, District, if applicable Your Position Vice Chair

If filing for multiple positions, list below or on an attachment.

Agency: Position:

2. Jurisdiction of Office (Check at least one box)

State Multi-County City of San Francisco Judge or Court Commissioner (Statewide Jurisdiction) County of San Francisco Other

3. Type of Statement (Check at least one box)

Annual: The period covered is January 1, 2011, through December 31, 2011. Leaving Office: Date Left The period covered is January 1, 2011, through the date of leaving office. Assuming Office: Date assumed The period covered is the date of leaving office. Candidate: Election Year Office sought, if different than Part 1:

4. Schedule Summary

Check applicable schedules or "None." Total number of pages including this cover page: 4 Schedule A-1 - Investments - schedule attached Schedule C - Income, Loans, & Business Positions - schedule attached Schedule A-2 - Investments - schedule attached Schedule D - Income - Gifts - schedule attached Schedule B - Real Property - schedule attached Schedule E - Income - Gifts - Travel Payments - schedule attached None - No reportable interests on any schedule

5. Verification

MAILING ADDRESS STREET CITY STATE ZIP CODE DAYTIME TELEPHONE NUMBER E-MAIL ADDRESS (OPTIONAL)

I have used all reasonable diligence in preparing this statement. I have reviewed this statement and to the best of my knowledge the information contained herein and in any attached schedules is true and complete. I acknowledge this is a public document.

I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

Date Signed March 27, 2012 Signature

SCHEDULE A-1 Investments

Stocks, Bonds, and Other Interests (Ownership Interest is Less Than 10%)

Do not attach brokerage or financial statements.

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION

Name
Jonathan Alloy

▶ NAME OF BUSINESS ENTITY
Berkshire Hathaway

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Business investment and management

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 11 _____ / _____ / 11
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY
Wells Fargo

GENERAL DESCRIPTION OF BUSINESS ACTIVITY
Financial Services

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 11 _____ / _____ / 11
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 11 _____ / _____ / 11
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 11 _____ / _____ / 11
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 11 _____ / _____ / 11
 ACQUIRED DISPOSED

▶ NAME OF BUSINESS ENTITY

GENERAL DESCRIPTION OF BUSINESS ACTIVITY

FAIR MARKET VALUE
 \$2,000 - \$10,000 \$10,001 - \$100,000
 \$100,001 - \$1,000,000 Over \$1,000,000

NATURE OF INVESTMENT
 Stock Other _____
(Describe)
 Partnership Income Received of \$0 - \$499
 Income Received of \$500 or More (Report on Schedule C)

IF APPLICABLE, LIST DATE:
 _____ / _____ / 11 _____ / _____ / 11
 ACQUIRED DISPOSED

Comments:

SCHEDULE C
Income, Loans, & Business Positions
(Other than Gifts and Travel Payments)

CALIFORNIA FORM 700
FAIR POLITICAL PRACTICES COMMISSION
Name
Jonathan Alloy

1. INCOME RECEIVED
NAME OF SOURCE OF INCOME
Wells Fargo
ADDRESS (Business Address Acceptable)
BUSINESS ACTIVITY, IF ANY, OF SOURCE
Financial Services
YOUR BUSINESS POSITION
Vice President and Product Manager
GROSS INCOME RECEIVED
CONSIDERATION FOR WHICH INCOME WAS RECEIVED

1. INCOME RECEIVED
NAME OF SOURCE OF INCOME
Prologis
ADDRESS (Business Address Acceptable)
BUSINESS ACTIVITY, IF ANY, OF SOURCE
Real Estate Investment Trust
YOUR BUSINESS POSITION
Spouse is Director, Financial Planning & Analysis
GROSS INCOME RECEIVED
CONSIDERATION FOR WHICH INCOME WAS RECEIVED

2. LOANS RECEIVED OR OUTSTANDING DURING THE REPORTING PERIOD

* You are not required to report loans from commercial lending institutions, or any indebtedness created as part of a retail installment or credit card transaction, made in the lender's regular course of business on terms available to members of the public without regard to your official status. Personal loans and loans received not in a lender's regular course of business must be disclosed as follows:

NAME OF LENDER*
ADDRESS (Business Address Acceptable)
BUSINESS ACTIVITY, IF ANY, OF LENDER
HIGHEST BALANCE DURING REPORTING PERIOD

INTEREST RATE
TERM (Months/Years)
SECURITY FOR LOAN
Guarantor
Other

Comments:

SCHEDULE D Income - Gifts

CALIFORNIA FORM 700
 FAIR POLITICAL PRACTICES COMMISSION
 Name
 Jonathan Alloy

▶ NAME OF SOURCE
 Comcast

ADDRESS (Business Address Acceptable)
 [REDACTED]

BUSINESS ACTIVITY, IF ANY, OF SOURCE
 Entertainment network

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
4 / 11 / 11	\$ 125	JVS ticket
/ /	\$	
/ /	\$	

▶ NAME OF SOURCE
 John Madden

ADDRESS (Business Address Acceptable)
 [REDACTED]

BUSINESS ACTIVITY, IF ANY, OF SOURCE
 Member of CGOBC

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
10 / 31 / 11	\$ 175	Silver SPUR ticket
/ /	\$	
/ /	\$	

▶ NAME OF SOURCE

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
/ /	\$	
/ /	\$	
/ /	\$	

▶ NAME OF SOURCE

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
/ /	\$	
/ /	\$	
/ /	\$	

▶ NAME OF SOURCE

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
/ /	\$	
/ /	\$	
/ /	\$	

▶ NAME OF SOURCE

ADDRESS (Business Address Acceptable)

BUSINESS ACTIVITY, IF ANY, OF SOURCE

DATE (mm/dd/yy)	VALUE	DESCRIPTION OF GIFT(S)
/ /	\$	
/ /	\$	
/ /	\$	

Comments: _____

Jonathan Alloy
— Clairview Ct
San Francisco, CA 94131
415. _____ @gmail.com

September 4, 2012

Supervisor Sean Elsbernd
City Hall, 1 Dr. Carlton B. Goodlett Place, Room 244
San Francisco, CA 94102-4689

Dear Supervisor Elsbernd:

It is an honor to serve as the Board of Supervisor's Community Organization appointee on the Citizens General Obligation Bond Oversight Committee. Per motion M11-35, my first of two allowed terms expires on November 21, 2012. I am writing to ask your nomination for reappointment to a second term.

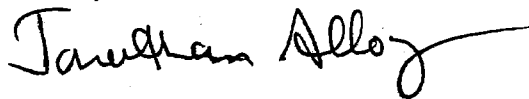
During my first term, I was twice elected Vice Chair unanimously by my colleagues, and have worked with the Chair to advance the oversight mission of the Committee, including:

- Assigning members as liaisons to specific projects (bonds, whistleblower, audit), to enable them to develop program knowledge and thus provide more effective oversight. Personally, I have spent numerous hours as liaison for the Earthquake Safety and Emergency Response Bond conducting site visits, document reviews, and project team meetings.
- Issuing the first RFQ by the Committee for bond oversight consulting contracts – initially for benchmarking and improvement recommendations for community engagement and design review of capital projects – and developing a target list of future audits.
- Increasing attention to the whistleblower program through hearings with the public and staff of the Controller's Office and Ethics Commission, resulting in a strengthened focus on resolving complaints on a timely basis, especially those claiming retaliation for protected activities.

I continue to fulfill the requirements of my seat. I serve on the Communications Committee for JVS.org, am a member of the Midtown Terrace Home Owners Association, and last month completed a statewide California Connections Fellowship. I regularly engage our community, including speaking to the SF Chamber of Commerce, Coalition for San Francisco Neighborhoods, and San Francisco State University.

As a homeowner and parent in District 7, it is gratifying to know I can make a positive difference in our community, and I would like to continue serving on the Citizens General Obligation Bond Oversight Committee. I have taken the liberty of updating my application with the Clerk, attached, and copying Mr. Volberding on this letter. Please let me know what the right steps are at this point. Thank you very much.

Sincerely,



Jonathan Alloy

CC: Alex Volberding
Enc.

San Francisco
BOARD OF SUPERVISORS

Date Printed: February 12, 2013

Date Established: March 5, 2002

Active

CITIZENS GENERAL OBLIGATION BOND OVERSIGHT COMMITTEE

Contact and Address:

Maura Lane
City Hall, Room 316
1 Dr. Carlton B. Goodlett Place
San Francisco, CA 94102

Phone: (415) 554-7502

Fax: (415) 554-7466

Email: maura.lane@sfgov.org

Authority:

San Francisco Administrative Code Article V (passed as Prop. F in the March 2002 election)

Board Qualifications:

The Citizens' General Obligation Bond Oversight Committee consists of a total of nine members, three of whom are appointed by the Board of Supervisors. The members appointed by the Board are comprised of the following: (1) one member shall be active in a business organization representing the business community located within the City; (2) one member shall be active in a labor organization; (3) one member shall be active in a community organization.

The other members are comprised of the following: Three members appointed by the Mayor and comprised of the following: (1) one member shall be active in a business organization representing the business community located within the City; (2) one member shall be active in a labor organization and (3) one member shall be active in a community organization. Two members are appointed by the Controller and comprised of the following: (1) one member with expertise in auditing governmental financial statements or with expertise in public finance law; (2) one member with expertise in construction management. One member is appointed by the Civil Grand Jury and shall be a member of the Civil Grand Jury or a designee appointed by the Civil Grand Jury.

No employee or official of the City shall be appointed to the committee. No vendor, contractor, or consultant of the City that performs work funded by bonds issued by the City shall be appointed to the committee.

Each member shall serve for a term of two years and for no more than two consecutive terms.

San Francisco
BOARD OF SUPERVISORS

The Civil Grand Jury's purpose is to inform the public concerning the expenditure of general obligation bond proceeds. The committee shall actively review and report on the expenditure of taxpayers' money in accordance with the voters' authorization.

Reports: The Committee shall issue regular reports on the results of its activities. A report shall be issued at least once a year.

Sunset Clause: None.