



**TO THE HONORABLE MAYOR AND COUNCIL:**

DATE: July 14, 2015

**SUBJECT: INTERVIEW OF APPLICANTS FOR CITY TREASURER VACANCY**

**Report in Brief**

At its regular meeting held Tuesday, June 2, 2015, the Concord City Council approved Resolution No. 15-40 defining a process to seek applications of eligible individuals for appointment to fill the vacancy which resulted from the resignation of City Treasurer Thomas Wentling.

Seven applicants are eligible for appointment, and this City Council meeting has been set to conduct the interviews. Attachment 1 provides a roster of the applicants. This report outlines the interview process.

**Background**

Adoption of Resolution No. 15-40 initiated the appointment process, but left open the option of calling a special election should the City Council fail to come to a consensus. A recruitment for applications was announced on Tuesday, June 2, 2015, stating that applications would be received from June 3 through July 2, 2015, at 5 p.m. To be eligible for appointment, an applicant is required to be a registered voter, 18 years of age or older, a U.S. citizen, and a resident of Concord. All applicants certified their eligibility and stated they were willing to serve the office if appointed.

Each candidate also submitted a State Fair Political Practices Commission Form 700, Statement of Economic Interests with their City application form. All applicants were deemed qualified by confirmation of Concord residency and voter registration at their Concord address.

**Discussion**

Council and staff developed a set of questions for the Council to ask candidates during the scheduled interviews, and Council may modify or expand on questions as time allows. In addition to providing a response to questions posed by the City Council, applicants will be given one minute prior to the interview questions for introductions and to share why they are interested in the Treasurer position.

Public comment will be taken by the Council at the end of the interview process and before the Council consideration and discussion.

The selection process may be continued to Tuesday, July 28, 2015, or may conclude with the selection of candidate to fill the vacancy by ballot vote of the City Council. The Council's decision will be ratified by

## INTERVIEW OF APPLICANTS FOR CITY TREASURER VACANCY

July 14, 2015

Page 2

the adoption of Resolution No. 15-51. Should the City Council fail to come to a consensus, the City Council may opt to call for a special election to fill the vacancy. This election would be held on Tuesday, November 3, 2015.

### **Fiscal Impact**

An appointment process would not result in any increased fiscal impact beyond assigned staff time. There is not a countywide election scheduled for 2015, and if Council chooses to call a Special Election, it would most likely be a stand-alone election. The City of Concord currently has a registration of 56,070 voters. Contra Costa County has provided an estimate for a stand-alone Polling Place Election at \$5/per registered voter for an estimated total of \$280,350, and between \$3 and \$4 per registered voter for a stand-alone Mail Ballot Election for an estimated total of \$224,280. The Special Election would be paid for from the City's General Fund. The proposed Fiscal Year 2015-16 budget does not currently include funding for a special election.

### **Public Contact**

Regular distribution of the agenda and report has been made. Applicants have been notified of the meeting by the method indicated on their filed application. The Council meeting agenda and reports with all applicant attachments are posted on the City's website.

### **Recommendation for Action**

The City Council is asked to conduct the interview session of applicants to fill the City Treasurer vacant seat. Council consideration of an appointment to fill the vacancy may commence immediately following the close of the public hearing. The Council will vote on their selection. The Council's vote will be ratified by the adoption of Resolution No. 15-51, or Council may continue the item to its regular meeting of Tuesday, July 28, 2015.

Prepared by: Joelle Fockler, CMC  
City Clerk  
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Valerie J. Barone  
City Manager

[Valerie.Barone@cityofconcord.org](mailto:Valerie.Barone@cityofconcord.org)

Reviewed by: Jovan Grogan  
Deputy City Manager  
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Attachment No. 1 – Roster of Applicants for City Treasurer Vacancy

Attachment No. 2 – Completed Application for each Applicant

Attachment No. 3 – Draft Resolution No. 15-51, ratifying the appointment of a person to serve as City Treasurer

**City of Concord  
City Treasurer Applicants  
July 14, 2015**

Gregory M. Grassi

Scott B. Hutchinson

Eric L. Maldonado

Timothy A. McGallian

John P. Pamer

Don Rollins

James J. Ryan

City of Concord  
**Application Form**

Submit Date: Jun 21, 2015  
Status: eligible

**Profile**

Mr.      Gregory      M.      Grassi  
Prefix      First Name      Middle Initial      Last Name

[REDACTED]

Email Address

[REDACTED]

Street Address

[REDACTED]

Suite or Apt

[REDACTED]

City

[REDACTED]

State

[REDACTED]

Postal Code

**Length Of Residence:**

28-yrs 9-mos  
At above address:

38-yrs  
In Concord

38-yrs  
In county:

**Resident**

Please list your residency status:

[REDACTED]

Primary Phone

[REDACTED]

Alternate Phone

Bank of Marin  
Employer

VP - Sr. Commercial Banking Officer  
Job Title

Commercial Banker  
Occupation

2.75 years  
Number of years at employer:

155 Grand Ave, Suite 100, Oakland, CA 94612  
Employer Address

## Which Boards would you like to apply for?

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City Treasurer

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## INTERESTS AND EXPERIENCE

**Please state your reason for applying, including qualifications for this position:**

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After recently reviewing the City budget as a member of the Measure Q Oversight Committee I have a greater appreciation of the financial challenges facing the City over the next ten years. I would like to apply my 41 years of experience as a Commercial Banker to assist City staff to meet those challenges. I have experience analyzing financial statements for businesses and non-profit entities to determine their viability as on-going enterprises including expert knowledge of cash flow analysis and projections. I also have a good understanding of fund accounting used by public agencies. My financial background would provide City staff with insights when dealing with banks and investment companies. I have been responsible for negotiating multi-million dollar contracts with clients to achieve a "win-win" outcome for all parties.

Question applies to City Treasurer.

**Describe prior service on a board, commission, or any other community service or public body, indicate agency and explain what significant contributions you made:**

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Appointed to the Measure Q Oversight Committee in April 2015. Reviewed the 2015-16 budget to assure compliance with funding requirements/restrictions of Measure Q. Past member of the Bay Area Small Business Development Corporation credit committee from 1997 to 1999. Committee was responsible for recommending loans for approval under the California State Loan Guaranty Program. Primary goal was job retention and/or creation. Appointed to Concord Redevelopment Advisory Committee (RAC) from 1985 to 1990, Chairman 1989 - 1990. Advised City Council on commercial development in Downtown Concord. Reviewed projects for viability and benefit to the City.

Question applies to City Treasurer.

**What do you feel is the role of the Treasurer and how will you successfully fill that role?**

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I believe that the Treasurer provides oversight to the City's finances to assure the public that their interests are represented. Though largely a ceremonial position, the City Treasurer is the "face" of the finance department and may be expected to engage citizens when issues arise. In particular, I would focus on explaining the need to deal with the unfunded liabilities and methods to resolve the funding gap.

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## EDUCATION AND TRAINING

**SUMMARIZE YOUR EDUCATIONAL HISTORY AND CERTIFICATIONS (name of institution, city, state, major, degree, certificate, etc.)**

**High School**

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Encina High School, Sacramento CA

## College

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California State University - Northridge, CA; BA - Political Science

## Technical/Vocational Training

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## Certification or Other

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Upload a Resume

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## TERMS OF ACCEPTANCE and SIGNATURE

I, applicant for Concord City Treasurer, warrant the truthfulness of the information provided in this application. I certify under penalty of perjury that I am a resident of the City of Concord and meet the eligibility requirements.

Gregory M. Grassi

Electronic Signature - Please type your First and Last Name

**Please Agree with the Following Statement**

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**I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms and Acceptance.**

---

I Agree \*

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**Profile**

Mr.                      Scott    B.                      Hutchinson  
Prefix                      First Name    Middle Initial                      Last Name

[REDACTED]

Email Address

[REDACTED]

Street Address

[REDACTED]

Suite or Apt

[REDACTED]

City

[REDACTED]

State

[REDACTED]

Postal Code

Length Of Residence:

19 years

At above address:

47 years

In Concord

47 years

In county:

**Resident**

Please list your residency status:

---

[REDACTED]

Primary Phone

[REDACTED]

Alternate Phone

Contra Costa County Sheriff

Employer

Network Administrator I

Job Title

Tech Support

Occupation

27

Number of years at employer:

30 Glacier Drive, Martinez, CA  
94553

Employer Address

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## Which Boards would you like to apply for?

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City Treasurer

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## INTERESTS AND EXPERIENCE

**Please state your reason for applying, including qualifications for this position:**

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Having lived in Concord my entire life, I want to help make a positive difference in my community. I have worked in Local Government for most of my adult life, so I understand how Government operates, and I served as the Treasurer of Northwood (Circle) Homeowners' Association here in Concord for several years, so I know how to monitor a complex budget.

Question applies to City Treasurer.

**Describe prior service on a board, commission, or any other community service or public body, indicate agency and explain what significant contributions you made:**

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I have not served on any Governmental Boards or the like, but I have served as Treasurer of a local Homeowners' Association and as Secretary of a local Non-Profit.

Question applies to City Treasurer.

**What do you feel is the role of the Treasurer and how will you successfully fill that role?**

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I understand the role is primarily to review and monitor City expenditures to ensure responsible spending of public funds. I will serve that role by 1 - Reviewing past budgets as well as current as well as interview signing authorities and other City staff as appropriate to become familiar with the current budget; 2 - Look for, research and if appropriate recommend places where the City could save money or spend it more effectively; and 3 - Monitor the budget for anomalies and variants over time, verifying such variations are appropriate or taking appropriate corrective action.

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## EDUCATION AND TRAINING

**SUMMARIZE YOUR EDUCATIONAL HISTORY AND CERTIFICATIONS (name of institution, city, state, major, degree, certificate, etc.)**

**High School**

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Concord High School, Concord, CA ~ Class of 1985

## College

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Diablo Valley College, Pleasant Hill, CA ~ Computer Science, Associates Degree earned but never filed for, 1988

## Technical/Vocational Training

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Countless Technical classes over the course of my career

## Certification or Other

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Upload a Resume

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## TERMS OF ACCEPTANCE and SIGNATURE

I, applicant for Concord City Treasurer, warrant the truthfulness of the information provided in this application. I certify under penalty of perjury that I am a resident of the City of Concord and meet the eligibility requirements.

**Scott Hutchinson**

Electronic Signature - Please type your First and Last Name

### Please Agree with the Following Statement

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**I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms and Acceptance.**

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I Agree \*

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**Profile**

Mr                      Eric    L                      Maldonado  
Prefix                      First Name    Middle Initial                      Last Name

[REDACTED]

Email Address

[REDACTED]

Street Address

[REDACTED]

Suite or Apt

[REDACTED]

City

[REDACTED]

State

[REDACTED]

Postal Code

Length Of Residence:

3

At above address:

10

In Concord

US

In county:

**Resident**

Please list your residency status:

[REDACTED]

Primary Phone

[REDACTED]

Alternate Phone

Travis Credit Union

Employer

Community & Government Relations Officer

Job Title

Community & Government Affairs

Occupation

6

Number of years at employer:

5441 Clayton Rd, Clayton, CA 94517

Employer Address

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## Which Boards would you like to apply for?

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City Treasurer

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## INTERESTS AND EXPERIENCE

**Please state your reason for applying, including qualifications for this position:**

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Dear City Council Members, I have been a resident in the City of Concord for the past 10 years and I have a passion to better serve my community. I bring more than 12 years in non-profit management, 7 years experience as a Financial Advisor and 6 years experience in community engagement through my current employer. My prior achievements and money management experience makes me the ideal candidate for the treasurer position. In addition, I bring diversity to an existing council that represents a diverse population in the city of Concord, including the Latino community.

Question applies to City Treasurer.

**Describe prior service on a board, commission, or any other community service or public body, indicate agency and explain what significant contributions you made:**

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I have served on several non-profit board: Hispanic Chamber of Commerce Contra Costa County, CA Hispanic Chamber of Commerce, CA Credit Union League, Rotary Club of Concord Diablo. My greatest contribution is when I served as President of the Hispanic Chamber of Commerce of Contra Costa (H5C) from 2011-2013. Under my tenure the H5C grew in total membership by 50% and over 300% in revenue. The H5C was recognized as Hispanic Chamber of the year in 2012 from all the chambers in the State of California and I was named Advocate of the Year. I also was a founding member of the Hispanic Chamber of Contra Costa Foundation and the Festival of Latin Culture. I have also served as Vice President, Treasurer and at Large Board of Director for the H5C Foundation.

Question applies to City Treasurer.

**What do you feel is the role of the Treasurer and how will you successfully fill that role?**

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The role of the City of Concord Treasurer is to review financial reports and oversee the compliance, income and expenses and deposits and securing of public funds. Most importantly, the role of treasurer is to communicate well with city staff and council members to maintain a strong financial outlook. I plan to successfully fill my role by meeting with city staff at least once a week and members of the council once a month. I also intend to have better communication with members of the community through a newsletter, participating in community events and open communication with our city council members. The biggest strength I bring to the position is that I am a problem solver. I will always do what's best for the City of Concord and it's residents so we are in a strong financial position to continue the growth of our great city where families come first.

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## EDUCATION AND TRAINING

**SUMMARIZE YOUR EDUCATIONAL HISTORY AND CERTIFICATIONS (name of institution, city, state, major, degree, certificate, etc.)**

## High School

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Archbishop Riordan High School San Francisco, CA High School Diploma

## College

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Heald School of Business San Francisco, CA Associate in Applied Science Degree, Computer Business Administration San Francisco City College Minor in Economics

## Technical/Vocational Training

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## Certification or Other

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Notre Dame Mendoza School of Business In Partnership United States Hispanic Chamber of Commerce Certification Program Certificates in: Nonprofit Management, Nonprofit Lobbying and Advocacy, Membership Growth, Social Media Marketing

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Upload a Resume

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## TERMS OF ACCEPTANCE and SIGNATURE

I, applicant for Concord City Treasurer, warrant the truthfulness of the information provided in this application. I certify under penalty of perjury that I am a resident of the City of Concord and meet the eligibility requirements.

**Eric L. Maldonado**

Electronic Signature - Please type your First and Last Name

**Please Agree with the Following Statement**

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**I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms and Acceptance.**

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I Agree \*

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**Profile**

Prefix                      Timothy                      A                      McGallian                       
First Name Middle Initial Last Name

[REDACTED]  
Email Address

[REDACTED]  
Street Address

[REDACTED]  
Suite or Apt

[REDACTED]  
City

[REDACTED]  
State

[REDACTED]  
Postal Code

**Length Of Residence:**

3  
At above address:

12  
In Concord

12  
In county:

**Resident**

Please list your residency status:

[REDACTED]  
Primary Phone

[REDACTED]  
Alternate Phone

State Farm Insurance  
Employer

Business Underwriting Specialist  
Job Title

Insurance and Financial Services  
Occupation

12  
Number of years at employer:

P.O. Box 921, Concord, CA 94522  
Employer Address

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## Which Boards would you like to apply for?

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City Treasurer

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## INTERESTS AND EXPERIENCE

Please state your reason for applying, including qualifications for this position:

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As someone who works daily to help business owners and individuals manage their risk of everyday life, reduce their liabilities, and minimize their exposure from loss, I feel that I can apply those same principals and prudent practices to ensure our continued financial security as the City of Concord Treasurer. Working in the Insurance and Financial Services industry for the past 12 years, I work as a risk manager and business consultant to help manage insured's property and casualty risk and financial risk. I am familiar with reviewing financial documents, working to assess opportunities to minimize risk, while maintaining, protecting, and growing assets. As a current member and Past Chairman of the City of Concord's Planning Commission, I have had the opportunity to work with many of the City of Concord departments, department heads, and the current City Council to help make the City of Concord a community on the rise. From business development, to infrastructure improvements, and community events, I am always looking for ways to make Concord a outstanding place to live and work. These efforts enhance property values, attract business and employment, which increases property values and city tax revenues. As the City of Concord Treasurer it is imperative that the City finances are kept safe, liquid, and are invested with the best return with maximum security. With over \$120,000,000 being invested in some type of vehicle at any one time, it is important that good oversight and accountability that the former Treasurer brought to the office is continued. As Treasurer I look forward to supporting the City Council and staff. I will continue to ensure that the City's Finances are available to implement the objectives of the City Council such as; economic development and growth, implementing the vision of Concord Naval Weapons Station Reuse Plan, The Downtown Specific Plan, and community outreach programs and events that will enhance Concord's economic vitality. My business backgrounds, civic involvement, and leadership roles have provided me with a solid foundation to continue my community service as its Treasurer.

Question applies to City Treasurer.

**Describe prior service on a board, commission, or any other community service or public body, indicate agency and explain what significant contributions you made:**

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Current Member and Past Chairman, City of Concord Planning Commission (2010-Present). • Updated the City of Concord's Development Code in order to encourage and foster economic development and maintain and improve our community property values. • Worked on the Concord Naval Weapons Station Reuse Plan and recommended its implementation in to the 2030 General Plan. • Worked on the Complete Streets Policy that would be incorporated in the 2030 General Plan Circulation Element. • Representative of the Planning Commission to the Downtown Concord Specific Plan Ad Hoc Steering Committee, creating opportunities to enhance business and residential growth which will improve property values and city revenues. • Representative of the Planning Commission to TRANSPAC, where we review all major transportation polies and projects affecting Concord and the Central County Region, and prioritize funding in accordance with voter approved Measure J funds. President, Todos Santos Business Association Arts Foundation Inc. (2013 – Present) • I founded the TSBA Arts Foundation with the mission to support, promote, and celebrate the arts and culture of Concord; create a strong, stable, and diverse cultural sector, and contribute to the quality of life and economic vitality of the Concord community. • Responsible for completing and filing the IRS and State for California paperwork necessary to successfully form a 501 (c)(3), non-profit public benefit corporation. This process would take almost 1 year and 40 – 50 hours of works to complete. • Established a Board of

Directors for the organization. • Established the internal fiduciary processes and structure for the organization. • Event founder and Producer of the Concord July 4th Festival and Fireworks where I worked with the City of Concord, the Mt. Diablo Unified School District, multiple community partners, and local businesses to raise over \$60,000 and organized this inaugural event in 2014, and then again in 2015. The event benefits over 12,000 people from not just the City of Concord, but the surrounding region. • In October of 2014, I organized the viewing of Game 5 of the World Series for the San Francisco Giants on Stage at Todos Santos Plaza. • In partnership with City of Concord, Monument Impact and the Concord Junior Giants organization, I brought the World Series Trophies to Todos Santos Plaza. This event would not only let residents take pictures with three San Francisco Giants Worlds Series Trophies, but it also helped to raise over \$5,000 for the Junior Giants organization. • In June of 2015, I organized the viewing of Game 5 of the NBA Championships for the Golden State Warriors. Vice-Chairman, Board of Directors, Greater Concord Chamber of Commerce (2010 – Present). • Responsible for overseeing daily operation, events, fundraising activities, staffing, and financial oversight. • Review monthly financial statements and annual budgets in order to understand the financial position of the organization and keep it viable. • Chair, Greater Concord Chamber of Commerce Government Affairs and Economic Development Committee (2008-2012). o Worked closely with local elected officials, their staffs, the City of Concord Redevelopment Agency and the City Manager's Office to strategize business development in Concord. o In 2009 we helped to update the City of Concord's procurement procedures in order to encourage local bids on projects and products supplied to the City of Concord. Past President, Kiwanis Club of Concord (2009 – 2011). • Charter Advisor for the Concord High School Key Club, where we engage youth in community service and leadership. • Event Co-Chair of the Taste of Concord that takes place the 1st Sunday in August which promotes downtown businesses to the community and region. • Worked with El Monte Elementary School to build their Community Garden and Outdoor Classroom. • Works closely with the CYC and supports their youth programs. Treasurer, Kiwanis Club of Concord (2011-present) • Responsible for making Annual IRS reports. • Responsible for all financial matter of the organization. o Budget creation. o Maintaining all financial record for the club. o Present monthly financial report to the Board of Directors and the general membership. President, School Board, St. Agnes School in Concord (2008 – Present). • Member of the Finance Committee that sets the schools budget and reviews the school investment portfolio during each school year. o Works with an external investment advisors on the portfolio performance and investment options for the organization. Assistant Cub Master, Cub Scout Pack 444 (2009-2014) Assistant Scout Master, Boy Scout Troop 465 (2014-Present) Head Coach, Concord American Little League (2007-2015)

Question applies to City Treasurer.

**What do you feel is the role of the Treasurer and how will you successfully fill that role?**

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The role of the City of Concord Treasure is to carefully monitor our City's investments assuring that they are always meeting the required laws as governed by the State of California and in compliance with the City of Concord's Investment Policy. As the Treasurer I will report to the City Council on a quarterly basis the investment transactions and our financial position. I will take the necessary time to research markets for the best investments per the City of Concords' investment policies; and ensure our investment policies are kept up to date with all applicable laws and regulations. My objective will be to continue to maintain the same financial integrity, public accountability, and oversight that the prior Treasurer brought to the City. Applying the principles of keeping the City of Concord's money secure, liquid, and finally yields a reasonable rate of return, I will continue to maintain our portfolio in a prudent manner that will benefit the citizens of Concord.

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## **EDUCATION AND TRAINING**

**SUMMARIZE YOUR EDUCATIONAL HISTORY AND CERTIFICATIONS (name of institution, city, state, major, degree, certificate, etc.)**

**High School**

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Bishop O'Dowd High School, Oakland, CA

## College

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California State University, Sacramento, Sacramento, CA, Graduated with a degree in Business Administration.

## Technical/Vocational Training

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## Certification or Other

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Upload a Resume

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## TERMS OF ACCEPTANCE and SIGNATURE

I, applicant for Concord City Treasurer, warrant the truthfulness of the information provided in this application. I certify under penalty of perjury that I am a resident of the City of Concord and meet the eligibility requirements.

Timothy McGallian

Electronic Signature - Please type your First and Last Name

**Please Agree with the Following Statement**

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I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms and Acceptance.

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I Agree \*



## Which Boards would you like to apply for?

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City Treasurer

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## INTERESTS AND EXPERIENCE

Please state your reason for applying, including qualifications for this position:

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Reasons for applying: 1. To be of service to my fellow citizens by helping to ensure Concord's finances are managed in a safe and sound manner. 2. To be of service to the City Management, specifically the Director of Finance, Senior Financial Analyst, and City Manager providing a public-sector perspective on budgeting and financial decisions. 3. To be of service to the City Council, providing accountability and an additional layer of oversight with respect to the City's fiscal affairs. Qualifications for the position: • Education: BSBA in Finance, and Master of Business Administration • Work Experience: Chief Executive Officer at a \$34 Million Credit Union, entire professional career (25+ years) spent in the financial services industry • Concord resident and homeowner for 10+ years

Question applies to City Treasurer.

Describe prior service on a board, commission, or any other community service or public body, indicate agency and explain what significant contributions you made:

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Mt. Diablo Unified School District Middle School Sports Committee: As a concerned parent I reached out to MDUSD about creating an Interscholastic Sports program for the District. I worked with a committee comprised of school district Executives, Principals, and other community leaders. The program was approved by the MDUSD Board in May 2015 and will launch in fall 2015. Total impact, 9 school sites in and around Concord, 1,600 families, \$100,000 + initial budget. Credit Union Sactown Ten Mile Run: I founded the inaugural charity race in 2012 and continue to chair the board. Since then, we have raised over \$600,000 for Children's Hospitals in California and Nevada, including over \$200,000 for Children's Hospital and Research Center in Oakland. The race is held annually on the first Sunday in April at the State Capitol in Sacramento. Children's Hospital and Research Center Oakland Collaboration Committee: As a member of the committee I was able to assist the hospital in securing a \$1 Million Donation from a prominent foundation in 2014. Creekside Community Church: Served as Treasurer from 2011-2014 and Chairman from 2011-2013. Created yearly budget, managed investments, executed real estate transactions. Mt. Diablo Unified School District Parent Advisory Council: In 2011-2012 when MDUSD experienced a severe budget shortfall, worked with other parents and the Superintendent to suggest ways to save money and budget more effectively. Successfully lobbied the district to keep Silverwood Elementary School in Concord open, despite it being targeted for closure.

Question applies to City Treasurer.

What do you feel is the role of the Treasurer and how will you successfully fill that role?

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The duties of City Treasurer are handled by a regular city employee and your website describes the elected Treasurer as fulfilling a ceremonial role. However, it would be my intention to serve the City when and where needed beyond a ceremonial role. It would not be proper to collect a stipend and other benefits from the City in return for little or no service. I would successfully fill the role of City Treasurer by making myself available to serve the City Council, Staff and my fellow citizens as the Council sees fit. I would welcome a discussion during the interview process as to how I will do this.

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## EDUCATION AND TRAINING

**SUMMARIZE YOUR EDUCATIONAL HISTORY AND CERTIFICATIONS (name of institution, city, state, major, degree, certificate, etc.)**

### High School

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Cuyahoga Falls High School 2300 Fourth Street Cuyahoga Falls, OH 44221 High School Diploma-June 1985

### College

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The Ohio State University 281 West Lane Avenue Columbus, OH 43210 Bachelor of Science in Business Administration, December 1989 Major: Finance The University of Phoenix 1625 West Fountainhead Parkway Tempe, AZ 85282 Attended the San Diego Campus Master of Business Administration--October 2003

### Technical/Vocational Training

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Harvard University Business School Boston, MA 02163 Completed one week intensive Advanced Leadership Course--July 2008

### Certification or Other

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California Notary Public Commission #2046953, Expires October 2017 National Mortgage Licensing System Identification #523379

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Upload a Resume

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## TERMS OF ACCEPTANCE and SIGNATURE

I, applicant for Concord City Treasurer, warrant the truthfulness of the information provided in this application. I certify under penalty of perjury that I am a resident of the City of Concord and meet the

eligibility requirements.

**John Pamer**

Electronic Signature - Please type your First and Last Name

**Please Agree with the Following Statement**

---

**I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms and Acceptance.**






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I Agree \*



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**Profile**

Prefix	<u>Don</u>	Middle Initial	<u>Rollins</u>	Last Name
				
Email Address				
				
Street Address			Suite or Apt	
				
City			State	Postal Code

Length Of Residence:

14 years  
At above address:

27  
In Concord

40  
In county:

**Resident**

Please list your residency status:

---

	
Primary Phone	Alternate Phone

Patelco Credit Union  
Employer

Branch Manager  
Job Title

Manager  
Occupation

11  
Number of years at employer:

1790 N Broadway, Walnut Creek,  
CA 94596  
Employer Address

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## Which Boards would you like to apply for?

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City Treasurer

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## INTERESTS AND EXPERIENCE

**Please state your reason for applying, including qualifications for this position:**

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I have a desire to continue to serve my city and community of Concord in any capacity to give back that has given so much to me and my family over the years. I have over twenty-five years of banking experience and twenty years of leadership experience I can bring to the Treasurer position. I feel with the knowledge that I have gained over the years I can assist the City of Concord with the accountability it needs for the Treasurer and his reporting to comply with State of CA law.

Question applies to City Treasurer.

**Describe prior service on a board, commission, or any other community service or public body, indicate agency and explain what significant contributions you made:**

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I served on the City of Concord's Commission on Aging from 2008-2013 and was Chair from 2011-2013. As a commission, we brought to the senior population information and helped develop programs to better the life our City seniors. Our commission helped develop the Senior Expo we partnered with the Concord Chamber, began the Santa for Senior program every Christmas season, brought in different speakers to the Concord Senior Center for seniors to hear, and worked with different agencies such as different health care and Veterans organizations to provide different health care fairs.

Question applies to City Treasurer.

**What do you feel is the role of the Treasurer and how will you successfully fill that role?**

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The Treasurer is a ceremonial position to comply with State law. The Treasurer must receive and safely keep all money coming into the Treasury, comply with all laws governing the deposit and securing of public funds, and pay out money only on warrants signed by legally designated persons, regular (at least once each month) submit to the City Clerk a written report and accounting of all receipts, disbursements, and fund balances, and perform such duties relative to the collection of city taxes and license fees as are prescribed by ordinance. I will work the Senior Financial Analyst from the City of Concord to ensure that all duties.

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## EDUCATION AND TRAINING

**SUMMARIZE YOUR EDUCATIONAL HISTORY AND CERTIFICATIONS (name of institution, city, state, major, degree, certificate, etc.)**

High School

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Northgate High School, Walnut Creek, CA

## College

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Cal State University, Chico - Bachelor of Science - Business Administration (Accounting, Human Resources), minors in Math and Computer Science.

## Technical/Vocational Training

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Banking experience - American Savings Bank - teller - 4 years; Metro 1 Credit Union - various positions including - Branch Manager, Accounting Supervisor, Teleservices Supervisor - 10 years, Patelco Credit Union - Branch Manager - 11 years.

## Certification or Other

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Notary since 2001

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Upload a Resume

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## TERMS OF ACCEPTANCE and SIGNATURE

I, applicant for Concord City Treasurer, warrant the truthfulness of the information provided in this application. I certify under penalty of perjury that I am a resident of the City of Concord and meet the eligibility requirements.

Don Rollins

Electronic Signature - Please type your First and Last Name

## Please Agree with the Following Statement

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**I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms and Acceptance.**

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I Agree \*

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**Profile**

\_\_\_\_\_ **James** \_\_\_\_\_ **J** \_\_\_\_\_ **Ryan** \_\_\_\_\_  
Prefix First Name Middle Initial Last Name

\_\_\_\_\_ [Redacted]  
\_\_\_\_\_

Email Address

\_\_\_\_\_ [Redacted]  
\_\_\_\_\_

Street Address

\_\_\_\_\_ [Redacted]  
\_\_\_\_\_

City

\_\_\_\_\_ [Redacted]  
\_\_\_\_\_

Suite or Apt

\_\_\_\_\_ [Redacted]  
\_\_\_\_\_

State

\_\_\_\_\_ [Redacted]  
\_\_\_\_\_

Postal Code

Length Of Residence:

One year  
At above address:

One year  
In Concord

Two years  
In county:

**Resident**  
Please list your residency status:

\_\_\_\_\_ [Redacted]  
\_\_\_\_\_

Primary Phone

\_\_\_\_\_ [Redacted]  
\_\_\_\_\_

Alternate Phone

Self  
Employer

Independent Contractor  
Job Title

Political and PR Consultant  
Occupation

2  
Number of years at employer:

Same as above  
Employer Address

## Which Boards would you like to apply for?

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City Treasurer

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## INTERESTS AND EXPERIENCE

**Please state your reason for applying, including qualifications for this position:**

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I have always had an interest in serving my community in some fashion. As an eagle scout, brother of a national service fraternity, and former Contra Costa Centre MAC member, public service is plain and simply a huge part of who I am. I have previously worked as a treasurer, assistant treasurer, and finance director on several political campaigns and have been responsible for bookkeeping as well as compliance with various local, state, and federal entities, and it would be an honor to serve the city I call home as its Treasurer.

Question applies to City Treasurer.

**Describe prior service on a board, commission, or any other community service or public body, indicate agency and explain what significant contributions you made:**

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I have previously served on the Contra Costa Centre Municipal Advisory Council, having been appointed by the County Board of Supervisors. The MAC is tasked with advising the Supervisors on local government services for the Contra Costa Centre transit village, as well as serving as a vehicle for community members to voice issues of concern. While my time on the MAC was brief -- I served for several months prior to moving to Concord to be closer to my wife's school -- my status as the only renter on a council that serves a predominantly rental community was crucial to ensuring representation for people like me. As a non-business resident, I also helped balance the council between business and non-business interests. Plus, my presence was appreciated on a council that was frequently unable to meet quorum.

Question applies to City Treasurer.

**What do you feel is the role of the Treasurer and how will you successfully fill that role?**

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My views on the role of the Treasurer are somewhat irrelevant, given that the office's primary duties are prescribed in CA Government Code sections 41001-41005. The role comes with the duty to maintain the Treasury, receive monies, make disbursements, prepare reports on the state of the Treasury, and ensure compliance with the law and relevant agencies. While it is my understanding that the City Treasurer serves in a primarily ceremonial capacity, my goals will be to faithfully discharge the duties of the office while maintaining an environment of honesty, accessibility, and transparency with the funds entrusted to my office by the public.

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## EDUCATION AND TRAINING

**SUMMARIZE YOUR EDUCATIONAL HISTORY AND CERTIFICATIONS (name of institution, city, state, major, degree, certificate, etc.)**

**High School**

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Concord High School, Wilmington, DE

## College

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University of Delaware, Newark, DE B.A. Political Science Minors: Psychology, English

## Technical/Vocational Training

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## Certification or Other

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Note: Form 700 was uploaded through a different application and will not appear on this one.

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Upload a Resume

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## TERMS OF ACCEPTANCE and SIGNATURE

I, applicant for Concord City Treasurer, warrant the truthfulness of the information provided in this application. I certify under penalty of perjury that I am a resident of the City of Concord and meet the eligibility requirements.

James Ryan

Electronic Signature - Please type your First and Last Name

**Please Agree with the Following Statement**

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I understand that checking this box constitutes a legal signature confirming that I acknowledge and agree to the above Terms and Acceptance.

---

I Agree \*



**BEFORE THE CITY COUNCIL OF THE CITY OF CONCORD  
COUNTY OF CONTRA COSTA, STATE OF CALIFORNIA**

**A Resolution Appointing  
To Fill the Unscheduled City Treasurer Position  
Following an Application and Interview Process**

**Resolution No. 15-51**

**WHEREAS**, at a Regular Meeting of the City Council held June 2, 2015, the Concord City Council adopted Resolution No. 15-40 authorizing the advertisement for applicants to fill the unscheduled vacancy of the City Treasurer caused by the retirement of Thomas Wentling effective July 1, 2015; and

**WHEREAS**, applications were received from citizens of Concord who expressed interest in serving as the City Treasurer and their willingness to fulfill the remaining term of the vacated office which expires in November 2018; and

**WHEREAS**, the application period ended at 5 p.m. on Friday, July 2, 2015; and

**WHEREAS**, at a Regular City Council Meeting held on Tuesday, July 14, 2015, seven applicants were interviewed.

**NOW, THEREFORE, THE CITY COUNCIL OF THE CITY OF CONCORD DOES  
RESOLVE AS FOLLOWS:**

**Section 1.** Pursuant to Government Code Section 36512, \_\_\_\_\_, is hereby appointed by vote of the City Council to serve as the Concord City Treasurer for the remainder of the unexpired term of the former incumbent, Thomas Wentling.

**Section 2.** The person appointed shall take office effective immediately after taking the Oath of Office and shall serve exactly as if elected at a municipal election for the office for a term ending in November 2018.

**Section 3.** This resolution shall become effective immediately upon its passage and adoption.

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**PASSED AND ADOPTED** by the City Council of the City of Concord on

\_\_\_\_\_, by the following vote:

**AYES:** Councilmembers -

**NOES:** Councilmembers -

**ABSTAIN:** Councilmembers -

**ABSENT:** Councilmembers -

**I HEREBY CERTIFY** that the foregoing Resolution No. 15-51 was duly and regularly adopted at a regular meeting of the City Council of the City of Concord on \_\_\_\_\_.

\_\_\_\_\_  
Joelle Fockler, CMC  
City Clerk

**APPROVED AS TO FORM:**

\_\_\_\_\_  
Mark S. Coon  
City Attorney