

# Boards and Commissions Application

## Profile

Please note, applications are continuously accepted to the City of San Jose Boards and Commissions. The Board or Commission you select may or may not indicate there is a vacancy. Your application will remain on file for one year from the date of submission. During the year, your application may be considered for unanticipated vacancies.

Additionally, applicants to the following commissions will be required to fill out a [Form 700](#) (California State required Statement of Economic Interest) within 30 days of appointment.

- Airport Commission
- Appeals Hearing Board
- Arena Authority
- Arts Commission
- Civil Service Commission
- Deferred Compensation Advisory Committee (DCAC)
- Downtown Parking Board
- Board of Fair Campaign and Political Practices (formerly Ethics Commission)
- Federated and Police & Fire Retirement Boards
- Historic Landmarks Commission
- Housing & Community Development Commission
- Work2future (SVWIB) Board
- Planning Commission\*

Mark  
First Name

Linder  
Last Name

[Redacted]  
Email Address

[Redacted]  
Street Address

[Redacted]  
Suite or Apt

[Redacted]  
City

[Redacted]  
State

[Redacted]  
Postal Code

## Are you a resident of San Jose?

Yes  No

What district do you live in? To verify, please click here:

[https://rovservices.sccgov.org/Home/IndexPost?](https://rovservices.sccgov.org/Home/IndexPost?selected=dt&electionId=133&distance=5&navtab=vc&asm=simple)

[selected=dt&electionId=133&distance=5&navtab=vc&asm=simple](https://rovservices.sccgov.org/Home/IndexPost?selected=dt&electionId=133&distance=5&navtab=vc&asm=simple) \*

N/A - Retirement Board Applicants Only

Mobile: [Redacted]  
Primary Phone

Home: [Redacted]  
Alternate Phone

## Length of Residency

None Selected

## Which Boards would you like to apply for?

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Federated City Employees' Retirement System: Submitted

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System  
Public members of the Board of Administration of the San Jose Police and Fire Department Retirement Plan or the Federated City Employees Retirement System must live within 50 miles of San Jose City Hall and meet specified eligibility requirements.

Employee members of the Retirement Boards must be active employees who are members of the respective retirement plan. The Police and Fire Department representative must be an employee of the Police or Fire Department respectively. The employee representatives to the Federated Board shall be employed by different departments.

Retiree members of the Retirement Boards must be persons who have retired under the provisions of the respective retirement plan.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**If not a resident, do you live within 50 miles of San Jose City Hall?**

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Yes  No

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Member Category: \***

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Retiree Representative

self employed

Employer

Principal, Mark Linder &  
Associates

Job Title

**Current Employer Address**

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**Current Employer of Spouse**

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Retired

**Address of Current Employer of Spouse**

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**Spouse's Job Title**

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Consultant

**If you or your spouse is retired and receiving a pension, please state source of pension.**

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City of San Jose and CalPers

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[REDACTED]

[REDACTED]

[REDACTED]

- 
- [REDACTED]
- [REDACTED]
- 
- [REDACTED]

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### Interests & Experiences

**High School, College, Professional, Vocational, or Other Schools Attended. Please include Major or Field of Study, Dates Attended, Degree and Date of Degree.**

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St. Louis Park High School in St. Louis Park Minnesota. Graduated in 1964. Macalester College, St. Paul, Minnesota Graduated in 1969 with combined BA degree in sociology, psychology, and political science. Masters in Public Administration from San Jose State University. Graduated in 1994. Participated in Harvard Kennedy School Executive Training for Senior State and Local Government Executives. Completed in June 2011, Industrial Areas Foundation training for community organizer. Completed in July 1973. Court Appointed Special Advocate training in Santa Cruz. Appointed a special advocate by the Child Dependency Court in Watsonville, November 2017.

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**List any position or office held in any governmental agency, civic, or charitable organization including the dates.**

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Assistant General Manager, Santa Cruz Metro Transit District 1987 - 1991 Assistant Town Manager, Town of Los Gatos, 1991 - 1995 Deputy City Manager, City of San Jose, 1995 - 1997 and 2006-2008 Director, Parks Recreation and Neighborhood Services, City of San Jose, 1997-2002 Assistant City Manager, City of San Jose, 2002-2006 Director, Parks and Recreation, City of Cupertino, 2008-2013 City Manager, City of Campbell, 2013-2016 Board Member, and audit committee member, Law Foundation Silicon Valley 2002-2008 Regional Strategy Team Member, Communities Organized for Relational Power in Action (COPA) 2006-2011 (Santa Cruz, Monterey county civic organization Co-chair, Affordable Housing Task Force, COPA, 2017-present St. Stephen's Lutheran Church Council, 2011-2017 (Santa Cruz), 2024 Interim City Manager - Town of Windsor, CA - 2022 Interim City Manager - City of Sonoma, CA - 2023 Retiree Representative - San Jose, Federated Board of Trustees 2021-current San Jose Retired Employees Association - ex officio member 20212 - current CASA Volunteer - Santa Cruz - 2019-2021

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### Languages Spoken

English

## Special Awards or Recognitions Received

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Special Acknowledgement from Job Corps members, Angell Job Corps Center, Yachats Oregon where I served as a VISTA (Americorps) Volunteer in 1965-1966 Student Body President, Macalester College, 1968-69

## Please state why you want to become a member of this Board or Commission including specific objectives which you would work toward as a member.

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I am interested in the fiscal stability of the Federated Retirement System. I believe I bring strong Public Sector management experience to the Board. I feel I would be a good representative for City of San Jose retirees.

## Please state any other information which you feel would be useful in reviewing your application

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I have a diverse background in private sector, nonprofit sector and local government. I feel these experiences will enable me to be a positive contributor to the work of the Board.

## Do you own property in the City of San José?

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Yes  No

If yes, please list the addresses here.

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## Do you rent property in the City of San José?

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Yes  No

If yes, is it a month-to-month lease?

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Yes  No

Question applies to multiple boards

**Are you currently experiencing homelessness or have you experienced it in the past?**

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Yes  No

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**State and local law require that you abstain from participation in decisions that may affect your financial interests, including sources of income, interest in real property, personal finances or investments. In addition, if appointed, you may be required to fill out a disclosure statement which identifies certain financial interest beginning with the immediate twelve-month period prior to your appointment. Please review the scope of your board/commission in Municipal Code Chapter 2.08. Based on your best judgment, does this Board or Commission make decisions that may affect sources of income, interests in real property, personal finances or investments of you or your spouse?**

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Yes  No

**If yes, please explain. Please identify any organizations, associations, corporations, or entities by which you are employed or associated that might be affected by decisions of this Board or Commission, and the positions you hold in these entities.**

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Question applies to multiple boards

**If appointed, you will be required to fill out a disclosure statement, which identifies certain of your financial interests beginning with the immediate twelve-month period prior to your appointment and annually on or before April 1 of each year thereafter. Please confirm that you have read Fair Political Practices Commission (FPPC) Form 700 Reference Pamphlet and agree to file required FPPC Form 700 Statements of Economic Interest, as required by current City Council Conflict of Interest resolution.**

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Yes  No

Question applies to multiple boards

**Have you ever been required to file a Statement of Economic Interest (Form 700) and failed to do so?**

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Yes  No

Question applies to multiple boards

**If yes, please explain in complete detail.**

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Question applies to multiple boards

**Please confirm that you have reviewed and agree to comply with the San Jose Municipal Code Chapter 12.08 (Prohibition of Gifts), City of San Jose Ethics Policy (City Policy Manual 1.2.1), and City of San Jose Gift Policy (City Policy Manual 1.2.2).**

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Yes  No

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**Reference 1 Name**

---

Jay Castellano

**Reference 1 Address**

---

[REDACTED]

**Reference 1 Email address**

---

**Reference 1 Phone**

---

[REDACTED]

**Reference 2 Name**

---

Leslye Corsiglia

Mark Linder

**Reference 2 Address**

---

[REDACTED]

**Reference 2 Email address**

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**Reference 2 Phone**

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[REDACTED]

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**Supplemental Questions**

**If applicable, have you ever attended or watched a meeting of the Commission(s) to which you are applying?**

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Yes  No

**Would you be available to attend meetings at the scheduled time?**

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Yes  No

**Please describe your experience in serving on a Commission or Board.**

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I have not served on a City of San Jose Board or Commission. I have served on the Law Foundation Silicon Valley Board. I have served on a League of California Cities Committee working on establishing a League run health insurance program for retirees and current public employees. I served on Church Council. I was a member of the Advisory Board for the Davenport Institute which is affiliated with Pepperdine University's School of Public Policy.

**Considering your experience and activities in business, labor, School, professional, social, Commissions, Boards, or other organizations, indicate the experience, training, knowledge and/or skills which qualify you for appointment.**

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I have over thirty years as a senior executive in local government including almost 13 years for the City of San Jose. For San Jose I was the Director of Parks, Recreation, and Neighborhood Services, Deputy City Manager, and Assistant City Manager. Prior to public service I was a leadership consultant, the vice president of a mortgage company, and a professional community organizer. I was an adjunct professor for the San Jose State Public Administration program teaching courses in public budgeting, organization theory, and leadership for 11 years.

**What is your understanding of the purpose of the Commission?**

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My understanding is the Commission is responsible for ethical and fiscal guidance of the Federated Retirement System. The Board makes decisions over investment policy and program policy. The Board also makes decisions regarding retirements and disability retirements.

**Please list three issues facing the City that you feel the Council should address.**

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The ongoing challenge of having a healthy and adequately funded retirement plan and OPEB. Second, the Board needs to improve communication with the City Council and the City Manager's Office. This was a recommendation found in the October 2017 City Auditor's recommendations. Third, the Board needs to reexamine the evaluation of investment managers and consultants. A portion of the operating budget is for investment managers and consultants. This recommendation was found in the October 2017 City Auditor's report.

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**What is the purpose of historic preservation in San José and what is the role of the Historic Landmarks Commission in achieving that purpose?**

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**Please explain your prior experience with historic preservation, with San José's public planning processes, and in working with City or other public agency staff.**

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**Anything else you would like us to know?**

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that I bring a wide range of experience in local government issues. I have worked with labor unions and management in local government. I feel I would be a contributor to the Board and would learn a great deal as well. I feel I could be a good communicator to City Council, the City Manager's Office, current employees and retirees if that was ever needed.

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(Optional) Please upload a resume.

Mark Linder

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## Retirement Board Questions Only

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Please list your applicable experience or expertise relevant to public retirement plan administration. \***

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Health and welfare and/or employee benefits management

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Please summarize your qualifications to serve as a member of the Retirement Board? Briefly highlight your skills, training, education, qualifications, experience (licenses and/or certifications) and personal qualities that you will bring to the Board and share with the organization.**

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Currently, I am the retired employees representative on the Federated Board. I chair the Governance Committee and the Disability Retirement Committee. I have held senior executive positions in local government for over thirty years. During this service I have been responsible for overseeing employee benefits, participated in labor negotiations regarding employee benefits, and served on a League of California Cities committee working on health care benefits. I also bring experience from being a part of the leadership of local government organizations participating in CalPers. I served on the audit committee for Law Foundation Silicon Valley. I have a calm demeanor, do my homework, and work well with others. I listen well and am not afraid to ask questions. I have experience in the financial world when I served as Vice President and General Manager for a mortgage company from 1982-1984. I have experience in working with elected officials. Prior to my work in the public sector I was a consultant with Cupertino-based Dale Watson & Associates. My clients included San Francisco Municipal Railway, Santa Clara County Transit District (now VTA), and Santa Clara County Public Guardian's Office.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Please discuss your pension plan and/or investment management and oversight experience including the development of key financial policies.**

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Currently, I am the Retirees Representative on the Federated Board of Trustees. In this capacity I participate in investment decisions as well as operations decisions. I am involved with reviewing and recommending policies as chair of the Governance Committee. I chair the Disability Retirements Committee and screen disability retirement applications and make recommendations to the Board. I recently joined the Joint Personnel Committee and worked on the search for our new CEO. During my tenure as Campbell's City Manager I worked closely with the Finance Director on our retirement policies in relation to CalPers and OPEB obligations. I also worked with the Human Resources Manager on policies related to retiree health care. My wife and I work closely with our financial planner regarding our deferred compensation investments. As treasurer and then president of the St. Stephen's Church Council I worked on policies related to staff retirement and health care.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Please describe your understanding of the relationship between the Retirement Board and City Council? The City Administration? Retirement Services staff? Employee bargaining units? Plan participants and beneficiaries?**

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The City Council is the sponsor for both Police and Fire and Federated Retirement Systems. The City Council appoints the members of both retirement systems boards. The City Council through its annual budget helps fund the retirement system and the Trust Fund. The Boards are the fiduciary and have fiduciary responsibility for the Retirees Trust Fund. City Employees also help fund the Trust Fund. The balance is funded by investments managed by the two Boards and the CIO and investment staff. When I served in San Jose, the Director of the Retirement System report to the City Manager and was part of the City Manager's senior staff team. Today, according to the organization chart on the website, the CEO of the Retirement Systems reports to the Federated and Police and Fire Boards which report to the City Council. Employees of Retirement Services are managed by the CEO. The Board works with the CEO, the General and Fiduciary Counsel, and the CIO. The Board works closely with the Office of Employee Relations. The Board would not deal directly with bargaining units or plan participants and beneficiaries except to make retirement decisions including disability retirement. Working with the bargaining units is the responsibility of the OER staff. Day to day activities and employee, retiree, and beneficiary interactions are handled by the System staff.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**What do you perceive as the short and long-term goals of the Retirement Board?**

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Provide clear and understandable information to elected officials, City employees, and plan participants and beneficiaries. Make wise decisions regarding the fiscal health of the retirement funds and OPEB funds. Make wise and responsible investment decisions that have been well researched and are understood. Assure that retirement staff receive the necessary tools and training to do their work well. Work collaboratively with one another and with the CEO and CIO. Examine the evaluation criteria for investment managers and consultants.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Do you believe that the retirement funds that are invested by the retirement boards are public funds? Why or why not?**

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I believe these are public funds that are to be used to provide retirement benefits to employees who have retired. The funds are public funds because most of the funds are provided by the tax payers of San Jose..

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Have you read the report by the City Auditor entitled, "Pension Sustainability: Rising Pension Costs Threaten the City's Ability to Maintain Service Levels?" This report is available at: <http://www.sanjoseca.gov/Home/ShowDocument?id=36432>.**

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Yes  No

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**If so, how is this report applicable to the work you would do as a Retirement Board Member?**

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This report and the October 2017 report on transparency, communication and budget are applicable. The reports specify the challenges facing the Commission regarding adequate funding for the system, communications with Council and the City Manager's Office, and the System's operating budget. The reports also spells out the impact on the City's budget and the services the budget funds.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**How do you ensure that you are maintaining an in-depth and up-to-date knowledge of institutional investing and the capital market environment?**

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I would be sure to read and understand all information provided by the staff, the investment managers and the consultants . I would also seek recommended reading from the staff and the other Board members. As the current Retiree's Representative on the Federated Board I attend educational seminars on public fund management and investment. I take this position seriously and would want my decisions to be grounded in solid information.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Given the current status of the capital markets, where do you see opportunities to increase return and reduce risk in the pension portfolios? What is your experience with risk budgeting?**

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Current capital markets have become a bit less stable in recent months. At least the unprecedented upward climb of the capital markets has leveled off and become more normal with steady incremental growth. However, the markets are stable over time. Any investment of pension funds should be in safe and solid organizations for both equities and bonds. Investment in real estate should be carefully reviewed in terms of long term viability. To me, there appears opportunity with investments in companies with strong price-earnings ratios and companies with long history of well managed finances and revenues. I feel there are possible opportunities in private equity funds.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Please describe your views on the role of asset allocation and provide detail on your recommended asset classes and proportions for pension funds like those serving the employees of the City of San Jose.**

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I reviewed the Investment asset allocation policy adopted by the Board in December 2017. I feel the allocations presented in the policy make sense. I acknowledge I am not an expert in this matter and am committed to learning as quickly as possible. Since joining the Board in 2021 I have participated in the asset allocation decisions. Asset allocation sets the framework for investments each year.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Should pension plans like those in San Jose invest in alternative investments such as private equity, commodities, infrastructure or separate account real estate? If so, how? If not, why?**

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I think these possibilities should be explored as to what benefit they might bring to the pension funds. I would avoid any high risk and volatile investments that could harm the overall fund. Any investments need to be thoroughly researched before any decision is made. That being said, these alternative investments provide good opportunities and should be investigated.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**How would you evaluate an investment manager? When would you terminate an investment manager? How should due manager diligence be conducted?**

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I would evaluate based on investment recommendations made, clarity in explaining why and ongoing communication as to results be they good or bad. I would terminate any investment manager that would not tell the truth or would try to hide any bad results. I would establish performance expectations and receive updates on the results. I would expect investment managers to work well with the CEO, CIO and other staff. The Board should help determine how the information is reported so it is useful in making decisions.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**What should be included in a pension plan's statement of investment policies? Please address the roles of trustees, staff, consultants, investment managers and custodians in asset allocation, portfolio structure, manager selection and due diligence, rebalancing, reporting and analysis.**

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The statement of investment policies should be clear and understandable by City Council, City employees and retirees and beneficiaries. Trustees are responsible for System oversight and investment policies. Trustees would also be responsible for approval of the budget. Staff responsibilities should be clearly laid out. Consultants and investment managers responsibilities should be clearly outlined. Asset allocation should be communicated at a high level with the rationale behind the allocation policies. The same is the case for portfolio structure, manager selection, due diligence, rebalancing reporting, and analysis. I feel the December 2017 investment allocation report is a good example of a useful and clear report. I acknowledge I will need to learn much more about this, but I am committed to do so if selected.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Individuals applying for appointment as public members of the Board are ineligible for appointment to the Board if they meet certain criteria. Please confirm if you meet any of the following criteria:**

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Retired members of, or persons participating in or receiving benefits from the Police and Fire Retirement Plan or Federated City Employees Retirement System

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Have you ever been convicted of a misdemeanor within the past five years or a felony within the past ten years (except for minor traffic offenses that resulted only in a fine)?**

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Yes  No

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**If yes, please explain in complete detail. State the nature and approximate date of the conviction, the sentence imposed, whether the sentence has been completed, and any other information you consider relevant.**

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Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Are you or your firm currently or within the past five years been the subject of any litigation or claims resulting from any investment activity, advice, a fiduciary relationship, or regarding alleged financial improprieties?**

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Yes  No

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**If yes, please provide details.**

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Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Are you or your firm currently or within the past five years been the subject of any investigation or disciplinary action by any governmental and/or regulatory body (SEC, NASD, states Attorney General or Insurance Commissioner, etc.)?**

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Yes  No

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**If yes, please provide details.**

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## **Verification**

**By checking the box below, you agree with the following statement.**

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**I agree that all of the information contained in my responses to the questions on this application are true and accurate to the best of my knowledge. I further agree that, by checking the box below and submitting this application, online or otherwise, I am affixing my digital signature to this form as of the date submitted.**

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I Agree \*

# Boards and Commissions Application

## Profile

Please note, applications are continuously accepted to the City of San Jose Boards and Commissions. The Board or Commission you select may or may not indicate there is a vacancy. Your application will remain on file for one year from the date of submission. During the year, your application may be considered for unanticipated vacancies.

Additionally, applicants to the following commissions will be required to fill out a [Form 700](#) (California State required Statement of Economic Interest) within 30 days of appointment.

- Airport Commission
- Appeals Hearing Board
- Arena Authority
- Arts Commission
- Civil Service Commission
- Deferred Compensation Advisory Committee (DCAC)
- Downtown Parking Board
- Board of Fair Campaign and Political Practices (formerly Ethics Commission)
- Federated and Police & Fire Retirement Boards
- Historic Landmarks Commission
- Housing & Community Development Commission
- Work2future (SVWIB) Board
- Planning Commission\*

Franco

First Name

Vado

Last Name

[Redacted]

Email Address

[Redacted]

Street Address

[Redacted]

Suite or Apt

[Redacted]

City

[Redacted]

State

[Redacted]

Postal Code

## Are you a resident of San Jose?

Yes  No

What district do you live in? To verify, please click here:

[https://rovservices.sccgov.org/Home/IndexPost?](https://rovservices.sccgov.org/Home/IndexPost?selected=dt&electionId=133&distance=5&navtab=vc&asm=simple)

[selected=dt&electionId=133&distance=5&navtab=vc&asm=simple](https://rovservices.sccgov.org/Home/IndexPost?selected=dt&electionId=133&distance=5&navtab=vc&asm=simple) \*

District 10

Mobile: [Redacted]

Primary Phone

Alternate Phone

## Length of Residency

6 or more years

## Which Boards would you like to apply for?

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Police and Fire Retirement Plan Board: Submitted

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

Public members of the Board of Administration of the San Jose Police and Fire Department Retirement Plan or the Federated City Employees Retirement System must live within 50 miles of San Jose City Hall and meet specified eligibility requirements.

Employee members of the Retirement Boards must be active employees who are members of the respective retirement plan. The Police and Fire Department representative must be an employee of the Police or Fire Department respectively. The employee representatives to the Federated Board shall be employed by different departments.

Retiree members of the Retirement Boards must be persons who have retired under the provisions of the respective retirement plan.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**If not a resident, do you live within 50 miles of San Jose City Hall?**

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Yes  No

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Member Category: \***

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Retiree Representative

city of san jose retired  
Employer

police officer  
Job Title

**Current Employer Address**

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[REDACTED]

**Current Employer of Spouse**

---

Google

**Address of Current Employer of Spouse**

---

[REDACTED]

**Spouse's Job Title**

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program manager

**If you or your spouse is retired and receiving a pension, please state source of pension.**

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City of san jose

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[Redacted]

[Redacted]

[Redacted]

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[Redacted]

[Redacted]

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[Redacted]

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**Interests & Experiences**

**High School, College, Professional, Vocational, or Other Schools Attended. Please include Major or Field of Study, Dates Attended, Degree and Date of Degree.**

West Valley College admin of justice 1989-1991-Evergreen College police academy 1995. Certifications from International Foundation of Employee Benefit Plans, CALAPRS, NCPER.

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**List any position or office held in any governmental agency, civic, or charitable organization including the dates.**

CFO of SJPOA 2010-2021

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**Languages Spoken**

English

---

**Special Awards or Recognitions Received**

DCAC, and P&F retirement board

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**Please state why you want to become a member of this Board or Commission including specific objectives which you would work toward as a member.**

As A former police active member of the plan I want to continue the work the board is doing to ensure the plan is fiduciarly sound, and can continue to provide benefits for current and future plan participants.

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**Please state any other information which you feel would be useful in reviewing your application**

Experience as a former active board member.

**Do you own property in the City of San José?**

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Yes  No

**If yes, please list the addresses here.**

---

[REDACTED]

**Do you rent property in the City of San José?**

---

Yes  No

**If yes, is it a month-to-month lease?**

---

Yes  No

Question applies to multiple boards

**Are you currently experiencing homelessness or have you experienced it in the past?**

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Yes  No

---

**State and local law require that you abstain from participation in decisions that may affect your financial interests, including sources of income, interest in real property, personal finances or investments. In addition, if appointed, you may be required to fill out a disclosure statement which identifies certain financial interest beginning with the immediate twelve-month period prior to your appointment. Please review the scope of your board/commission in Municipal Code Chapter 2.08. Based on your best judgment, does this Board or Commission make decisions that may affect sources of income, interests in real property, personal finances or investments of you or your spouse?**

---

Yes  No

**If yes, please explain. Please identify any organizations, associations, corporations, or entities by which you are employed or associated that might be affected by decisions of this Board or Commission, and the positions you hold in these entities.**

---

Question applies to multiple boards

**If appointed, you will be required to fill out a disclosure statement, which identifies certain of your financial interests beginning with the immediate twelve-month period prior to your appointment and annually on or before April 1 of each year thereafter. Please confirm that you have read Fair Political Practices Commission (FPPC) Form 700 Reference Pamphlet and agree to file required FPPC Form 700 Statements of Economic Interest, as required by current City Council Conflict of Interest resolution.**

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Yes  No

Question applies to multiple boards

**Have you ever been required to file a Statement of Economic Interest (Form 700) and failed to do so?**

Yes  No

Question applies to multiple boards

**If yes, please explain in complete detail.**

Question applies to multiple boards

**Please confirm that you have reviewed and agree to comply with the San Jose Municipal Code Chapter 12.08 (Prohibition of Gifts), City of San Jose Ethics Policy (City Policy Manual 1.2.1), and City of San Jose Gift Policy (City Policy Manual 1.2.2).**

Yes  No

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**Reference 1 Name**

Jason Starr

**Reference 1 Address**

[REDACTED]

**Reference 1 Email address**

**Reference 1 Phone**

[REDACTED]

**Reference 2 Name**

Kurt Carrasquilla

**Reference 2 Address**

[REDACTED]

**Reference 2 Email address**

**Reference 2 Phone**

[REDACTED]

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**Supplemental Questions**

**If applicable, have you ever attended or watched a meeting of the Commission(s) to which you are applying?**

---

Yes  No

**Would you be available to attend meetings at the scheduled time?**

---

Yes  No

**Please describe your experience in serving on a Commission or Board.**

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In the last 10 years I have 4 different boards

**Considering your experience and activities in business, labor, School, professional, social, Commissions, Boards, or other organizations, indicate the experience, training, knowledge and/or skills which qualify you for appointment.**

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10 years as CFO of the San Jose Police Officers Association, former board member, trainings from CALAPRS, NCPERS, and the International Foundation of Employee Benefit Plans.

**What is your understanding of the purpose of the Commission?**

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Determine eligibility for benefits, act as a fiduciary for the plan, set assumptions, and manage the investments of the retirement fund.

**Please list three issues facing the City that you feel the Council should address.**

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Investment risk vs return in a volatile market Sustainability unfunded liability

---

**What is the purpose of historic preservation in San José and what is the role of the Historic Landmarks Commission in achieving that purpose?**

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**Please explain your prior experience with historic preservation, with San José's public planning processes, and in working with City or other public agency staff.**

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## Anything else you would like us to know?

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(Optional) Please upload a resume.

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## Retirement Board Questions Only

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Please list your applicable experience or expertise relevant to public retirement plan administration. \***

Other

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Please summarize your qualifications to serve as a member of the Retirement Board? Briefly highlight your skills, training, education, qualifications, experience (licenses and/or certifications) and personal qualities that you will bring to the Board and share with the organization.**

10 years as CFO of the San Jose Police Officers Association, former board member, trainings from CALAPRS, NCPERS, and the International Foundation of Employee Benefit Plans.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Please discuss your pension plan and/or investment management and oversight experience including the development of key financial policies.**

Have previously sat on the board and subcommittees that have developed and administered these policies.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Please describe your understanding of the relationship between the Retirement Board and City Council? The City Administration? Retirement Services staff? Employee bargaining units? Plan participants and beneficiaries?**

administer plan benefits to participants in accordance with bargaining unit agreements and the muni code. Insure the plan remains sustainable. Retirement services staff aid members in the processing of applications and administer benefits, and provides support and direction to the committee.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**What do you perceive as the short and long-term goals of the Retirement Board?**

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Navigate the current unknown market conditions Reduce the unfunded liability

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Do you believe that the retirement funds that are invested by the retirement boards are public funds? Why or why not?**

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The funds are a combination of member contributions and public funds

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Have you read the report by the City Auditor entitled, "Pension Sustainability: Rising Pension Costs Threaten the City's Ability to Maintain Service Levels?" This report is available at: <http://www.sanjoseca.gov/Home/ShowDocument?id=36432>.**

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Yes  No

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**If so, how is this report applicable to the work you would do as a Retirement Board Member?**

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Balancing actuarial assumptions to control city contributions and maintain city services.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**How do you ensure that you are maintaining an in-depth and up-to-date knowledge of institutional investing and the capital market environment?**

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Attend trainings, consult with investment staff and consultants.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Given the current status of the capital markets, where do you see opportunities to increase return and reduce risk in the pension portfolios? What is your experience with risk budgeting?**

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Looking for alternative asset allocations with the goal of managing the risk to the fund. I would be sitting as a retiree member and will defer to the financial professionals.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Please describe your views on the role of asset allocation and provide detail on your recommended asset classes and proportions for pension funds like those serving the employees of the City of San Jose.**

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As a retiree representative I would look at the recommendations of investment committee with the input of the financial consultant and retirement board staff.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Should pension plans like those in San Jose invest in alternative investments such as private equity, commodities, infrastructure or separate account real estate? If so, how? If not, why?**

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Yes, at the recommendation of the financial experts

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**How would you evaluate an investment manager? When would you terminate an investment manager? How should due manager diligence be conducted?**

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Investment managers are removed if they do not preform. Due diligence should be done by investment staff in coordination with the CIO

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**What should be included in a pension plan's statement of investment policies? Please address the roles of trustees, staff, consultants, investment managers and custodians in asset allocation, portfolio structure, manager selection and due diligence, rebalancing, reporting and analysis.**

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An investment policy is the guidelines that a retirement plan uses to select and monitor the investments. It should include the roles and responsibilities of the trustees, staff, consultants and managers. Trustees are the fiduciaries responsible for administering the plan. Staff is responsible for implementing board decisions, and qualifying and administering benefits to participants. Consultants advise the board on best practices.

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Individuals applying for appointment as public members of the Board are ineligible for appointment to the Board if they meet certain criteria. Please confirm if you meet any of the following criteria:**

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None Selected

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Have you ever been convicted of a misdemeanor within the past five years or a felony within the past ten years (except for minor traffic offenses that resulted only in a fine)?**

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Yes  No

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**If yes, please explain in complete detail. State the nature and approximate date of the conviction, the sentence imposed, whether the sentence has been completed, and any other information you consider relevant.**

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Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Are you or your firm currently or within the past five years been the subject of any litigation or claims resulting from any investment activity, advice, a fiduciary relationship, or regarding alleged financial improprieties?**

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Yes  No

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**If yes, please provide details.**

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Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**Are you or your firm currently or within the past five years been the subject of any investigation or disciplinary action by any governmental and/or regulatory body (SEC, NASD, states Attorney General or Insurance Commissioner, etc.)?**

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Yes  No

Question applies to Police and Fire Retirement Plan Board, Federated City Employees' Retirement System

**If yes, please provide details.**

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## **Verification**

**By checking the box below, you agree with the following statement.**

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**I agree that all of the information contained in my responses to the questions on this application are true and accurate to the best of my knowledge. I further agree that, by checking the box below and submitting this application, online or otherwise, I am affixing my digital signature to this form as of the date submitted.**

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I Agree \*