

# Attachment A

**APPLICATION FOR  
SANTA BARBARA COUNTY EMPLOYEES' RETIREMENT SYSTEM  
BOARD OF TRUSTEES**

Return to: Clerk of the Board of Supervisors  
105 E. Anapamu Street, Room 407  
Santa Barbara, CA 93101

DATE RECEIVED  
2017 OCT 24 AM 9:41

COUNTY OF SANTA BARBARA  
CLERK OF THE BOARD OF SUPERVISORS

Copy to Supervisor

**Instructions:** Please complete each section below. Be sure to enter the seat number (only one per application) for which you desire consideration in Box 1. For more complete information or assistance, contact the Clerk of the Board of Supervisors at (805) 568-2240 or sbcob@co.santa-barbara.ca.us. Please print in ink or type. Please note that ALL information provided is a matter of public record, and is subject to disclosure.

1. APPLYING FOR: SANTA BARBARA COUNTY EMPLOYEES RETIREMENT SYSTEM BOARD OF TRUSTEES  
2. TODAY'S DATE: 10-23-17

3. NAME: Benedetti Trent J  
Last First Middle  
4. E-MAIL ADDRESS: \_\_\_\_\_

5. MAILING ADDRESS: \_\_\_\_\_  
Number Street  
Santa Maria 93455  
City Zip Code  
6. TELEPHONE:  
Home: \_\_\_\_\_  
Mobile: \_\_\_\_\_  
Business: \_\_\_\_\_

7. REFERENCES: Provide names and addresses of three (3) individuals (not relatives) who have knowledge of your character, experience, community involvement, and abilities.

NAME	ADDRESS	TELEPHONE	OCCUPATION
Rick Haydon			Santa Maria City Manager
Alice Patino			Santa Maria Mayor
Michael Moats			Medical Doctor

8a. Are you, or have you ever been, employed by the County of Santa Barbara or a Special District that participates in the Retirement System?  
 No  Yes - if yes, please list below  
System: Assessment Appeals maybe Dates: \_\_\_\_\_

8b. Do you have a family member that is a member, retiree or beneficiary of the Santa Barbara County Employees' Retirement System?  
 No  Yes - if yes, please explain below

8c. Are you, or have you ever been, an owner, partner, investor, employee or contractor of a firm that markets to or attempts to sell products, services, advice or other to any public retirement system located within the state of California?  
 No  Yes - if yes, Please list all firm names and dates of relationship with such firm.

9. PLEASE CHECK APPROPRIATE BOXES (OPTIONAL):  
Ethnic or Racial Identity:  
 White  Asian/Pacific Islander  
 African American  Native American/Alaskan Native  
 Hispanic  Other (please specify): \_\_\_\_\_  
Sex:  
 Male  Female

10. EDUCATION COMPLETED:  
Bachelor of Science, Accounting Major

11. EXPERIENCE: Please explain any specific work/educational/volunteer experience, qualifications, training, activities or other in the fields of investments, benefits administration, disability, actuarial, accounting, audit, information systems & technology, fiduciary, legal, tax or securities that would bring value to the Board of Retirement. Attach additional sheets as necessary.

Certified Public Accountant, participated and supervisor pension audits; Certified Financial Planner; Registered Investment Advisor, work with RIA group managing 8.2 billion, personal responsibility for \$41 million. Treasurer Los Padres Boy Scouts Council, Endowment Board member manage \$4.4 million.

12. ADDITIONAL INFORMATION: Please explain in a few paragraphs why you are interested in serving as a fiduciary trustee on the Retirement System's Board. Include, but do not limit, your response to your original motivation to apply, and whether you have ever attended a Retirement Board meeting. Attach additional sheets as necessary.

My life work, over 30 years experience, has been in investment management and related legal and tax compliance. I have served as a fiduciary for retirement plans. Understanding modern economic science as a field developed since 1990 Nobel Science work is a passion. I would like to give back to my local community and serve to ensure SBCERS is a good steward of the funds entrusted to its care.

13. SIGNATURE OF APPLICANT: Trent Benedetti Date: 10-23-17

**APPLICATION FOR  
SANTA BARBARA COUNTY EMPLOYEES' RETIREMENT SYSTEM  
BOARD OF TRUSTEES**

Return to: Clerk of the Board of Supervisors  
105 E. Anapamu Street, Room 407  
Santa Barbara, CA 93101

DATE RECEIVED

2017 NOV 15 PM 2:17

COUNTY OF SANTA BARBARA  
 Copy to Supervisor

**Instructions:** Please complete each section below. Be sure to enter the seat number (only one per application) for which you desire consideration in Box 1. For more complete information or assistance, contact the Clerk of the Board of Supervisors at (805) 568-2240 or sbcob@co.santa-barbara.ca.us. **Please print in ink or type. Please note that ALL information provided is a matter of public record, and is subject to disclosure.**

**1. APPLYING FOR:**  
SANTA BARBARA COUNTY EMPLOYEES RETIREMENT SYSTEM BOARD OF TRUSTEES

**2. TODAY'S DATE:** November 10, 2017

**3. NAME:** Sten Ted J  
\_\_\_\_\_  
Last First Middle

**4. E-MAIL ADDRESS:** \_\_\_\_\_

**5. MAILING ADDRESS:**  
\_\_\_\_\_  
Number Street  
Summerland 93067  
\_\_\_\_\_  
City Zip Code

**6. TELEPHONE:**  
Home: \_\_\_\_\_  
Mobile: \_\_\_\_\_  
Business: \_\_\_\_\_

**7. REFERENCES:** Provide names and addresses of three (3) individuals (not relatives) who have knowledge of your character, experience, community involvement, and abilities.

NAME	ADDRESS	TELEPHONE	OCCUPATION
Gary Blair	Carpinteria		Retired
Peter van Duinwyk	Montecito		Retired
Pam Olsen	Santa Barbara		Retired

**8a. Are you, or have you ever been, employed by the County of Santa Barbara or a Special District that participates in the Retirement System?**  
 No  Yes - if yes, please list below  
System: \_\_\_\_\_ Dates: \_\_\_\_\_

**8b. Do you have a family member that is a member, retiree or beneficiary of the Santa Barbara County Employees' Retirement System?**  
 No  Yes - if yes, please explain below

**8c. Are you, or have you ever been, an owner, partner, investor, employee or contractor of a firm that markets to or attempts to sell products, services, advice or other to any public retirement system located within the state of California?**  
 No  Yes - if yes, Please list all firm names and dates of relationship with such firm.

**9. PLEASE CHECK APPROPRIATE BOXES (OPTIONAL):**  
Ethnic or Racial Identity:  
 White  Asian/Pacific Islander  
 African American  Native American/Alaskan Native  
 Hispanic  Other (please specify): \_\_\_\_\_  
Sex:  
 Male  Female

**10. EDUCATION COMPLETED:**  
Occidental College  
Bachelor of Arts  
Political Science/Public Policy

**11. EXPERIENCE:** Please explain any specific work/educational/volunteer experience, qualifications, training, activities or other in the fields of investments, benefits administration, disability, actuarial, accounting, audit, information systems & technology, fiduciary, legal, tax or securities that would bring value to the Board of Retirement. Attach additional sheets as necessary.  
Please see attached.

**12. ADDITIONAL INFORMATION:** Please explain in a few paragraphs why you are interested in serving as a fiduciary trustee on the Retirement System's Board. Include, but do not limit, your response to your original motivation to apply, and whether you have ever attended a Retirement Board meeting. Attach additional sheets as necessary.  
Please see attached.

**13. SIGNATURE OF APPLICANT:**     *Ted J. Sten*     **Date:**     11/10/2017

**Ted Sten**

**Summerland - 20 year resident**

**Married - Celebrated 50th wedding anniversary July 2017**

**Two children and four grandchildren**

**Education**

**Webb School of California - graduate**

**Occidental College - Bachelor of Arts graduate**

**USC School of Law graduate studies**

**Experience and Personal Commitment**

**From a very personal perspective I strongly believe in a fiscally sound Santa Barbara County retirement system that takes into consideration and protects the interests of the primary County stakeholders: the County taxpayers, the County's active employees and the County's retirees. I refer to my very personal commitment since my wife spent 32 years in the Los Angeles County retirement system from which she draws a retirement pension, my father worked for 38 years in the Los Angeles County retirement system as a Head District Attorney and from which he too received a County pension. My son has been in the LA County pension system for 10 years and intends to retire from County service and I worked for 5 years in the LA County Retirement system as a CAO Budget Analyst. In total, my family has spent 80 years working under a very strong and fiscally sound Los Angeles County retirement system and I would see my personal commitment to be to assure Santa Barbara County employees and retirees the same level of confidence that they will have a strong, dependable and fiscally sound retirement system. I intend to convey my strongly held belief that I would take my fiduciary trustee responsibilities very seriously and would be dedicated to the retirement system's strength and prudent operation.**

**Additional Information and Background**

**Office of the Los Angeles County District Attorney - Administrative Assistant to William B. McKesson, District Attorney.**

**Chairman - Arcadia Civil Service Commission**

**Chairman - Los Angeles County District Attorney's Advisory Commission**

**Attorney General's Advisory Committee**

**County of Santa Barbara Affordable Housing Committee - Appointed by Supervisor Carbajal to represent the 1st District**

**My experience includes working as a Budget Analyst for the Los Angeles County Chief Administrative Office where I participated in the fiscal budgeting and management of Los Angeles County's largest departments.**

**A 32 year career in the management of American Telephone and Telegraph in both staff and line assignments involving finance, direct employee supervision and in-depth analysis and responsibility for spending millions of AT&T corporate dollars.**

**More recently, I have served 5 terms as Foreman of the Santa Barbara County Grand Jury having been appointed to that 7 day-a-week position by Presiding Judges: Rodney Melville, William McLafferty, Brian Hill and Arthur Garcia. This unique distinction, conveyed on me by very different Presiding Judges, gave me a County-wide perspective on not only how our Santa Barbara County operates but, more importantly, it daily showed me the dedication, service and commitment of our active and retired County employees.**

**I would consider my responsibility as a Retirement Board Trustee to be a personal commitment and as important in assuring a fiscally sound retirement system for our active and retired employees as I did in assuring the Santa Barbara County Grand Jury performed as the "watch dog" for all of our Santa Barbara County citizens.**

<b>APPLICATION FOR SANTA BARBARA COUNTY EMPLOYEES' RETIREMENT SYSTEM BOARD OF TRUSTEES</b>  Return to: Clerk of the Board of Supervisors 105 E. Anapamu Street, Room 407 Santa Barbara, CA 93101	DATE RECEIVED  2017 NOV 16 AM 9:42  <input type="checkbox"/> Copy to Supervisor
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**Instructions:** Please complete each section below. Be sure to enter the seat number (only one per application) for which you desire consideration in Box 1. For more complete information or assistance, contact the Clerk of the Board of Supervisors at (805) 568-2240 or sbcob@co.santa-barbara.ca.us. Please print in ink or type. Please note that ALL information provided is a matter of public record, and is subject to disclosure.

<b>1. APPLYING FOR:</b> SANTA BARBARA COUNTY EMPLOYEES RETIREMENT SYSTEM BOARD OF TRUSTEES	<b>2. TODAY'S DATE:</b> 11/15/17
<b>3. NAME:</b> BENNINGHOVEN, DONALD C. <small>Last First Middle</small>	<b>4. E-MAIL ADDRESS:</b>
<b>5. MAILING ADDRESS:</b>  Number Street SANTA BARBARA 93103 <small>City Zip Code</small>	<b>6. TELEPHONE:</b> Home: _____ Mobile: _____ Business: _____

**7. REFERENCES:** Provide names and addresses of three (3) individuals (not relatives) who have knowledge of your character, experience, community involvement, and abilities.

NAME	ADDRESS	TELEPHONE	OCCUPATION
JIM ARMSTRONG			FORMER CITY MGR, CITY OF SANTA BARBARA
SUZI SCHOMER			VP, WEALTH MGMT., MONTECITO BANK & TRUST
THE REV. AIMÉE EYER-DELEVETT			RECTOR, ALL SAINTS EPISCOPAL CHURCH

**8a. Are you, or have you ever been, employed by the County of Santa Barbara or a Special District that participates in the Retirement System?**  
 No     Yes - if yes, please list below  
 System: \_\_\_\_\_ Dates: \_\_\_\_\_

**8b. Do you have a family member that is a member, retiree or beneficiary of the Santa Barbara County Employees' Retirement System?**  
 No     Yes - if yes, please explain below

**8c. Are you, or have you ever been, an owner, partner, investor, employee or contractor of a firm that markets to or attempts to sell products, services, advice or other to any public retirement system located within the state of California?**  
 No     Yes - if yes, Please list all firm names and dates of relationship with such firm.

**9. PLEASE CHECK APPROPRIATE BOXES (OPTIONAL):**  
 Ethnic or Racial Identity:  
 White     Asian/Pacific Islander  
 African American     Native American/Alaskan Native  
 Hispanic     Other (please specify): \_\_\_\_\_

Sex:  
 Male  
 Female

**10. EDUCATION COMPLETED:**  
 MASTER OF ARTS, UNIV. OF CALIFORNIA, BERKELEY

**11. EXPERIENCE:** Please explain any specific work/educational/volunteer experience, qualifications, training, activities or other in the fields of investments, benefits administration, disability, actuarial, accounting, audit, information systems & technology, fiduciary, legal, tax or securities that would bring value to the Board of Retirement. Attach additional sheets as necessary.  
 - please see attached

**12. ADDITIONAL INFORMATION:** Please explain in a few paragraphs why you are interested in serving as a fiduciary trustee on the Retirement System's Board. Include, but do not limit, your response to your original motivation to apply, and whether you have ever attended a Retirement Board meeting. Attach additional sheets as necessary.  
 - please see attached

**13. SIGNATURE OF APPLICANT:** Date: 11/15/17

## **Don Benninghoven Biography**

Don served the League of California Cities for 40 years, 27 of which as the Executive Director. After a short stint with the City of Fremont, he started with the League as a field representative. As he moved up through the League, he managed the League's Los Angeles Office, was a lobbyist and assistant director.

Don was tapped to advise various governors on major pieces of legislation, including working with Gov. Pat Brown as a regular Cabinet attendee, with Gov. Reagan on the collective bargaining act and the coastal protection act, and Gov. Jerry Brown on Prop. 13.

He served on a number of boards of directors relating to public administration and public policy, including on the board of the National League of Cities and the prestigious National Academy of Public Administration. Don served on the Governor's Commission on Transportation Financing (under Gov. Davis), Vice Chair of the California State Constitution Revision Commission (Gov. Wilson), and the Governor's Commission on Local Government Financing (Gov. Deukmejian).

He also helped co-found the Cities-Counties-Schools Partnership, serving as the first executive director of that organization immediately after his retirement from the League in 1998. Don is a CalPERS retiree.

In retirement, Don served as chair of the Marine Life Protection Act to preserve marine life along the California coast, from the Mexican border to Santa Barbara. He was then appointed by the Governor to serve on the Fish and Game Commission to ensure adoption and implementation of the MPA. This groundbreaking public-private partnership became an international model for environmental protection.

Don's a proud father of three wonderful children: his son Scott is a surgeon in Gilroy; his twin daughter is a Silicon Valley engineer; and his other twin daughter is a Bay Area city manager. He resides in Santa Barbara with his wife, Sheri, where he enjoys tennis, lawn bowling and serving as Treasurer of All Saints-by-the-Sea Episcopal Church.

A veteran of the U.S. Army, Don received his Master of Arts in public administration from the University of California, Berkeley.

**Don Benninghoven**  
**Statement of Interest**  
**Santa Barbara County Employees' Retirement System Board of Trustees**

I have spent my entire career working to serve the public. Joining the SBERS Board of Trustees would enable me to continue my love of public policy as well as public service, and my local community.

The work that public employees perform each day is significant; they work tirelessly on behalf of our area residents. Helping to ensure the viability of the retirement system is integral to the overall public service delivery system.

Further, the integrity of the retirement system is essential for the continued prosperity for the County, its employees and I would enjoy being a contributor to this effort.

My work as the Executive Director of the League of California Cities exposed me to various investment policy issues, as well as employee benefits matters, both as an employer as well as the representative of local governments to the legislature.

I am a current member of the CalPERS, giving me insight as a retiree, thus perhaps another unique perspective.

Sincerely,

  
Donald C. Benninghoven





**Scott Estby**

**Addendum to Application for Board of the Santa Barbara County Employees' Retirement System**

**11)** I have over 15 years of experience as an investment manager, in a fiduciary environment, currently as a Sr. Portfolio Manager for Montecito Bank & Trust. My role at MB&T includes co-managing the bank's own bond portfolio, serving as investment manager for individual clients and many local non-profits, and serving as a voting member of the bank's Investment Policy Committee which sets strategic and tactical asset allocation targets for client accounts. I believe my experience would be valuable to the Board of Retirement, specifically in the investment related skills summarized below:

- Understanding of Modern Portfolio Theory,
- Understanding the impact of asset allocation on the risk/return trade-offs,
- Ability to interpret statistical data,
- Manager selection and monitoring,
- Developing and refining Investment Policy Statements,
- Fixed income management.

I've attached a resume providing additional background about regarding my work experience, education and volunteer activities.

**12)** I have a passionate, life-long interest in investment management and I believe I could provide valuable service as a fiduciary trustee helping oversee SBCERS's assets on behalf of the plan's participants. In short, it's an opportunity for me to do something I enjoy and to "do good" in my community.

And, although my investment career experience has many aspects that are directly relevant to serving as a fiduciary trustee on the Board of Retirement, I'm also looking forward to applying my investment knowledge on a greater scale with greater variety of investment options (from private equity investments to direct lending and other alternative investments).

In a challenging time for many pension systems I think it's vitally important to provide investment expertise to ensure we meet the commitments made to plan participants. I believe I can help the Board of Retirement meet those commitments efficiently.

I do follow investment updates from SBCERS, but I have not attended a Retirement Board Meeting in the past.

## Scott Estby, CFA

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### *Experience*

May 2002 - Present

**Montecito Bank & Trust**, Santa Barbara, CA

*Vice President, Sr. Portfolio Manager*

- Manage \$200MM in private client and endowment portfolios consisting of equity, fixed income and liquid alternative assets designed to achieve investment returns consistent with client goals and objectives.
- Communicate with clients to determine investment objectives, establish appropriate asset allocation, implement strategy, and proactively review results with clients.
- Serve on Montecito Bank & Trust's Investment Policy Committee determining Strategic and Tactical asset allocation guidelines for model portfolios and recommending investment solutions.
- Serve as a key member of the investment team responsible for the management, reporting and regulatory compliance of the Bank's \$400MM bond portfolio.
- 10-year track record of meaningful fixed income out-performance vs. Barclay's Aggregate Bond Index for client accounts.
- Develop client and prospect presentation materials.
- Authored monthly Investment Outlooks.

February 2001 – May 2002

**PlanMember Services**, Carpinteria, CA

*Investment Analyst*

- Assisted in the development of asset allocation recommendations, including collection and input of data into the models and optimizer, participated in the development of inputs for our asset allocation models, and made adjustments to the portfolio optimization models.
- Analyzed mutual funds and stock portfolios to evaluate performance vs. market benchmarks and peer groups, performed style analysis, performance attribution, risk and reward profiling and sector shift analysis.
- Assisted in equity research and made stock recommendations for client portfolios.

February 1999 – January 2001

**Ocwen Financial**, West Palm Beach, FL

*Cash Management Analyst*

- Reconciled bank accounts and prepared wire transfers to meet daily deadlines.
- Analyzed loan documents and installed new loans into the commercial loan servicing system.
- Calculated and verified receipt of servicing fees.
- Prepared monthly departmental income projections for presentation to senior management.

### *Education & Coursework.*

1996 - 1998

**Florida Atlantic University**, Boca Raton, FL

- B.A. in Finance and International Business (GPA 3.8, Magna Cum Laude)

1993 - 1996

**Bellevue Community College**, Bellevue, WA

- A.A. in Business (GPA 3.1)

### *Additional Information*

- Obtained CFA designation in 2003.
- Proficient with Bloomberg, Moxly/Advent, Excel, Word and PowerPoint.
- Treasurer for Explore Ecology.

**APPLICATION FOR  
SANTA BARBARA COUNTY EMPLOYEES' RETIREMENT SYSTEM  
BOARD OF TRUSTEES**

Return to: Clerk of the Board of Supervisors  
105 E. Anapamu Street, Room 407  
Santa Barbara, CA 93101

DATE RECEIVED

2017 NOV 28 PM 1:08

COUNTY OF SANTA BARBARA  
CLERK OF THE BOARD OF SUPERVISORS

**Instructions:** Please complete each section below. Be sure to enter the seat number (only one per application) for which you desire consideration in Box 1. For more complete information or assistance, contact the Clerk of the Board of Supervisors at (805) 568-2240 or sbcob@co.santa-barbara.ca.us. Please print in ink or type. Please note that ALL information provided is a matter of public record, and is subject to disclosure.

1. APPLYING FOR: SANTA BARBARA COUNTY EMPLOYEES RETIREMENT SYSTEM BOARD OF TRUSTEES  
2. TODAY'S DATE: 11-24-2017

3. NAME: THOMPSON MICHAEL H.  
Last First Middle  
4. E-MAIL ADDRESS:

5. MAILING ADDRESS: SANTA BARBARA 93108  
Number Street City Zip Code  
6. TELEPHONE: Home: Mobile: Business:

7. REFERENCES: Provide names and addresses of three (3) individuals (not relatives) who have knowledge of your character, experience, community involvement, and abilities.

NAME	ADDRESS	TELEPHONE	OCCUPATION
W.D. SANTORO, MD.			M.D (RET)
PATRICIA DAVIS			MONTECITO ASSN:
JOHN MACHER			PRES. RUIBEA PRODUCTION

8a. Are you, or have you ever been, employed by the County of Santa Barbara or a Special District that participates in the Retirement System?  
 No  Yes - if yes, please list below  
System: \_\_\_\_\_ Dates: \_\_\_\_\_

8b. Do you have a family member that is a member, retiree or beneficiary of the Santa Barbara County Employees' Retirement System?  
 No  Yes - if yes, please explain below

8c. Are you, or have you ever been, an owner, partner, investor, employee or contractor of a firm that markets to or attempts to sell products, services, advice or other to any public retirement system located within the state of California?  
 No  Yes - if yes, Please list all firm names and dates of relationship with such firm.

9. PLEASE CHECK APPROPRIATE BOXES (OPTIONAL):  
Ethnic or Racial Identity:  
 White  Asian/Pacific Islander  
 African American  Native American/Alaskan Native  
 Hispanic  Other (please specify):  
Sex:  
 Male  Female

10. EDUCATION COMPLETED:  
3 YRS. UNDER GRADUATE

11. EXPERIENCE: Please explain any specific work/educational/volunteer experience, qualifications, training, activities or other in the fields of investments, benefits administration, disability, actuarial, accounting, audit, information systems & technology, fiduciary, legal, tax or securities that would bring value to the Board of Retirement. Attach additional sheets as necessary.  
ANTE. RESUME WILL SHOW EXTREMELY SIMILAR POSITIONS, SERVICES PERFORMED FOR OTHER COMPANIES, BOARDS OF DIR., PUBLIC ENTITIES, ETC.

12. ADDITIONAL INFORMATION: Please explain in a few paragraphs why you are interested in serving as a fiduciary trustee on the Retirement System's Board. Include, but do not limit, your response to your original motivation to apply, and whether you have ever attended a Retirement Board meeting. Attach additional sheets as necessary.  
IN ADDITION TO EXPERIENCES LISTED IN #11 ABOVE, MY MATURITY AND 20 YRS. OF RESIDENCE IN SB CAN AND SHOULD BE UTILIZED FOR THE COUNTY'S BENEFIT. THANK YOU FOR THE OPP.

13. SIGNATURE OF APPLICANT: MICHAEL H. THOMPSON Date: 11/24/2017

Michael H. Thompson

2017 NOV 14 PM 1:45

COUNTY OF SAN DIEGO  
CLERK OF THE

## CAREER SUMMARY

Proven record of leadership and achievement in leading edge software/hardware technology in Marketing/Sales Management positions. Demonstrated expertise in start up and emerging stage product/service companies. Strategic Alliance relationship management. Global new account sales. Consistent over quota performance.

## PROFESSIONAL EXPERIENCE

AMTEC.As Independent Contractor, acted as Director Partnership Development, for software/services OEMs• Established channel/reseller relationships for outsourced services for Variable Data Printing, Electronic Signatures, Compliance, HIPAA, SOX, Best Practices • Product demos, contract terms, marketing communications, new account sales, web site design, recruiting.

ELECTRO-OPTICAL INDUSTRIES, INC. • Sales & Marketing Manager, for Infrared and Electro-Optical test/calibration OEM. • Responsible for domestic sales and marketing activities to aerospace, defense contractors, military and commercial end users, existing and net-new business. • Trade events, marketing budget, engineering and manufacturing design input, new product/business development, pricing committee, vertical market penetration, key account teams.

FRIEDMAN RESEARCH CORPORATION • Vice President Business Development, for automotive and aircraft safety products design firm. • Responsible for new product marketing to OEM and TIER 1 suppliers, defense contractors, government agencies, contract manufacturers. • Direct representative recruitment, trade events, key account contact, website design, industry conferences, business plan author, marketing communications.

ORIGIN DATA, INC. • Director Business Development, for leading edge software developer engaged in B2B commerce at systems level. • Emphasis on XML solutions in Data Analytics, Business Intelligence, Content Management, EDI. • Responsible for strategic alliances, co-development, market entry, key accounts. • Authored business plan, marketing communications, licensing, trade shows.

MAGNETIC DATA TECHNOLOGIES • Vice President Sales, responsible for all North American sales and marketing for contract manufacturing, outsourcing services, logistics for hi-tech products in computer peripheral, telecommunication, Data Storage fields. • Development, training and supervision of all direct and indirect sales. • Major account responsibility, budget performance, advertising, corporate and marketing communications, Sales Force Automation, new product introduction. • Qualified for quarterly and annual over quota bonus. • Clients included IBM, Quantum, H-P, Maxtor, Apple .

DATA EXCHANGE Corporation • Vice President Worldwide Sales, responsible for all direct and indirect sales. • Developed and implemented programs for outsourced support services for manufacturing, repair, help desk, logistics, and warranty. • Direct supervision of strategic alliances, major corporate accounts, new business development, recruiting, budget, marketing communications, trade shows • Opened 4 new country operations, doubled European revenue projections

CERPLEX GROUP, INC. • National Director of Sales, responsible for recruiting, training, direct supervision of all independent manufacturer's representatives (50) for multi-division electronics/information technology services corporation. • Provided marketing/sales direction for contract manufacturing, depot repair, parts, logistics warehousing. Marketing input to acquisition deal team • Advertising, trade shows, marketing communications, sales events. • Revenue increase from 70 million to 150 million USD annually.

## EDUCATION

University of Michigan - Business Administration  
Grand Rapids Junior College-Business Administration  
Santa Barbara City College-Computer Applications  
Proficient Microsoft Office Suite, Act, Goldmine, CRM

**APPLICATION  
FOR  
COUNTY OF SANTA BARBARA BOARD,  
COMMISSION, OR COMMITTEE**

Return to: Clerk, Board of Supervisors  
County Administration Building  
105 E. Anapamu Street, Room 407  
Santa Barbara, CA 93101

DATE RECEIVED

2017 NOV -2 PM 12:33

COUNTY OF SANTA BARBARA  
 Copy to Supervisor

**INSTRUCTIONS:** Please complete each item below. Be sure to enter the title of the Board, Commission, or Committee (only one per application please) for which you desire consideration. For more complete information or assistance contact the Clerk, Board of Supervisors' Office. This application shall be maintained for a period of one year only. After one year it is necessary to file a new application for another year of eligibility. Please print in ink or type.

1. APPLYING FOR: ( Use specific title) SB Co. Retirement Board 2. Today's Date:

3. NAME: Geyer Craig C 4. E-MAIL ADDRESS:  
Last First Middle

6. ADDRESS: Goleta CA 93117 5. TELEPHONE: ca1805  
Number Street City Zip Code Home: Business:

7. References: Give names and addresses of three persons, not relatives, who have knowledge of your character, experience, community involvement, and abilities.

NAME	ADDRESS	TELEPHONE NUMBER	OCCUPATION
A. Harry Hagen			
B. Jennifer Christensen			
C. William Dillon			

8. Are you or have you been employed by the County of Santa Barbara?  YES  No If YES, list:  
Department: Title: Date:

9. Please check appropriate boxes (optional):  
Ethnic or racial identity:  
 White  Black (African American)  Hispanic  Asian/Pacific Islander  Native American/Alaskan Native  Other (Please specify)  
Sex:  
 Male  Female

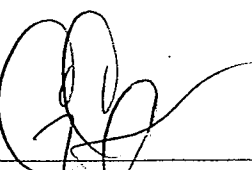
10. Education completed:  
14 years

11. Indicate Supervisor who will receive a copy of this application:  
Supervisor Wolf

12. EXPERIENCE: Please explain why you are interested in serving and what experience you bring to the Commission or Committee for which you are applying.  
Elected Director at Goleta West Sanitary District  
Elected Commissioner at SB LAFCO  
Appointed Trustee At MVMD of SB County  
Appointed member of SB Co Treasury Oversight Committee  
Certified Board Secretary

13. ADDITIONAL INFORMATION: Give any information explaining your qualifications, experience, training, education, volunteer activities, community organization memberships, or personal interests that bear on your application for above Board, Commission, or Committee. Attach additional sheets as necessary.

I have many years of experience in special district government. I have served on finance committees dealing with investments, benefits and retirement policies and programs.  
I have a very strong background in Brown Act training and compliance.  
I am current with all board and committee required training.



14. SIGNATURE OF APPLICANT





# Charles Stauffer

## PROFILE

I am a management professional with many years of business experience in Santa Barbara County. I am especially interested in organizational communications. Throughout my career, I have enjoyed building organizations and overcoming obstacles. My objective is to continue challenging myself while contributing to the community's quality of life.

## EXPERIENCE

**Principal, Stauffer Communications, LLC, Santa Maria/Solvang, CA** 2002 – 2010  
Marketing and PR consultant with emphasis in strategic marketing. Work with vendors to produce marketing materials. Plan and place advertising and PR for retail, service businesses and community groups. Advise groups on strategic marketing.

**Director, Foundation/Public Affairs, Marian Medical Center, Santa Maria, CA** 2002  
Directed charitable operations and all communications and media

**Sales and Leasing Executive, Pacifica Commercial Real Estate, Santa Maria, CA** 1996–2000  
Specialist in office, retail and investment commercial real estate. Purchased, renovated and managed small industrial property.

**General Manager, KCOY-TV, Santa Maria, CA** 1984–1996  
Responsible for management of CBS Affiliated Television Station

**Business Manager, KCOY-TV** 1982–1984  
Automated station operations and general ledger. Completed corporate management training program.

**Asst. News Director/News Producer, KCOY-TV** 1980–1982  
Upgraded all aspects of news operation. Produced and wrote 11 o'clock news.

**News Reporter/Producer, WIBW-TV, Topeka, KS** 1978–1980

## EDUCATION

University of California, Santa Cruz  
B.A. American Studies (1978)

## SKILLS/TRAINING

I have both experience and training in management, strategic planning and organizational development. I have received training through the University of Indiana Fundraising School (2002), the American Management Association (1987) and the Leader-to-Leader Foundation - formerly the Peter Drucker Foundation - (2003).

## COMMUNITY ACTIVITIES

Past President: SYV Natural History Society, Friends of the SYV Library, Marian Medical Center Foundation and United Way of the Central Coast.

Past Nonprofit board service: SB County Grand Jury, 2010-12. SY Valley Arts Outreach, Wildling Museum, Santa Maria Rotary, California Broadcasters Association, Santa Maria Natural History Museum, and Santa Maria Chamber of Commerce.

Board of Supervisors  
Santa Barbara County  
105 E. Anapamu Street, Room 407  
Santa Barbara, Ca 93101

October 16, 2017

Dear Santa Barbara County Board of Supervisors,

This letter is to express my interest in serving an additional term on the Board of Retirement for the Santa Barbara County Employees' Retirement System (SBCERS). I have very much enjoyed serving the public and the System's beneficiaries as a member of the Board of Retirement. As an independent appointed Board Member, I believe I add value to the Board by offering a private sector perspective.

I believe that my 40 years of experience working in the financial services industry uniquely positions me to make a significant contribution to SBCERS. In addition to my hands on experience in the financial services industry, I have also successfully served on several local Boards and Commissions including the SBCC Foundation, Santa Barbara Trust for Historic Preservation and the Council on Alcoholism and Drug Abuse, among others. My educational background combined with my financial services experience and extensive involvement with community organizations, provide me with the experience and demonstrated commitment to the community that contribute to my qualifications as a candidate to be a fiduciary for SBCERS.

Thank you in advance for considering me for another term. Please don't hesitate to contact me if you have any questions regarding my candidacy or my qualifications.

Sincerely,



Suzi Schomer

CC: Gregory Levin, CPA SBCERS CEO

APPLICATION FOR  
COUNTY OF SANTA BARBARA  
BOARD, COMMISSION OR COMMITTEE

Return to: Clerk of the Board of Supervisors  
105 E. Anapamu Street, Room 407  
Santa Barbara, CA 93101

DATE RECEIVED

2016 JUL 12 PM 4:39

COUNTY OF SANTA BARBARA

CLERK OF THE BOARD OF SUPERVISORS

Instructions: Please complete each section below. Be sure to enter the title of the Board, Commission, or Committee (only one per application) for which you desire consideration in Box 1. For more complete information or assistance, contact the Clerk of the Board of Supervisors. Please print in ink or type. Please note that ALL information provided is a matter of public record, and is subject to disclosure.

1. APPLYING FOR: (Use Specific Title of Board, Commission or Committee)

Board of the Santa Barbara County Employees' Retirement System

2. TODAY'S DATE:

July 11, 2016

3. NAME:

Schomer Katherine Suzanne (Suzi)  
Last First Middle

4. E-MAIL ADDRESS:

6. ADDRESS:

Number Street

City Zip Code

5. TELEPHONE:

Home: \_\_\_\_\_

Business: \_\_\_\_\_

7. REFERENCES: Give names and addresses of three (3) individuals (not relatives) who have knowledge of your character, experience, community involvement, and abilities.

NAME	ADDRESS	TELEPHONE	OCCUPATION
Jeff Pittman			Executive Vice President/Montecito Bank & Trust
Dr. Edward E. Birch			Chairman/Samuel B. Mosher Foundatio.
Harry E. Hagen, CPA			County of SB Treasurer-Tax Collector

8. Are you, or have you ever been, employed by the County of Santa Barbara?

No  Yes - if yes, list below

Department: \_\_\_\_\_

Title: \_\_\_\_\_

Date: \_\_\_\_\_

9. PLEASE CHECK APPROPRIATE BOXES (OPTIONAL):

Ethnic or Racial Identity:

- White  
 African American  
 Hispanic  
 Asian/Pacific Islander  
 Native American/Alaskan Native  
 Other (please specify): \_\_\_\_\_

Sex:

- Male  
 Female

10. EDUCATION COMPLETED:

B.A., MEd.

11. INDICATE SUPERVISOR WHO WILL RECEIVE A COPY OF APPLICATION:

Janet Wolf

12. EXPERIENCE: Please explain why you are interested in serving, and what experience you bring to the Committee. Attach additional documentation as necessary.

Service on the Committee offers an opportunity for me to combine my years of experience in investment management and financial services with my commitment to community service. Please see attached details.

13. ADDITIONAL INFORMATION: Give any information explaining qualifications, experience, training, education, volunteer activities, community organization memberships, or personal interests that bear on your application for the above Board, Commission or Committee. Attach additional sheets as necessary.

Please see attached details.

14. SIGNATURE OF APPLICANT: \_\_\_\_\_

*Katherine A. Schomer*