SELECTION COMMITTEE FOR THE
TransNet INDEPENDENT TAXPAYER
OVERSIGHT COMMITTEE

The Selection Committee may take action on any item appearing on this agenda.

Friday, May 26, 2017

8:15 a.m. (immediately before the Board of Directors meeting)

SANDAG, Conference Room 8A
401 B Street, Suite 800
San Diego, CA 92101

Staff Contact: José A. Nuncio
(619) 699-1908
jose.nuncio@sandag.org

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ITEM NO. | RECOMMENDATION
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1. | SELECTION OF A CHAIR
   
   The Selection Committee should select a chairperson for purposes of conducting the meeting.

+2. | APPROVE
   
   APPOINTMENT OF MEMBERS FOR THE *TransNet* INDEPENDENT TAXPAYER OVERSIGHT COMMITTEE (Ariana zur Nieden)

   The membership of the *TransNet* Independent Taxpayer Oversight Committee (ITOC) consists of seven voting members, each of whom represents a specified area of expertise. Staff will summarize the roles of the Technical Screening Committee and Selection Committee in the selection process for ITOC members. Pursuant to the *TransNet* Extension Ordinance, the Selection Committee is asked to: 1) approve the reappointment of Brad Barnum for an additional four-year term to continue serving in his current position through May 2021; 2) approve the appointment of Dick Vortmann for an additional four-year term to continue serving in his current position through May 2021; and 3) consider the candidates and approve the selection of one ITOC member for the position of a professional with demonstrated experience of ten years or more in real estate, land economics, and/or right-of-way acquisition through May 2020.

3. | PUBLIC COMMENTS/COMMUNICATIONS/MEMBER COMMENTS

   Members of the public shall have the opportunity to address the Selection Committee on any issue within the jurisdiction of SANDAG that is not on this agenda. Anyone desiring to speak shall reserve time by completing a “Request to Speak” form and giving it to the Selection Committee Coordinator prior to speaking. Public speakers should notify the Selection Committee Coordinator if they have a handout for distribution to Selection Committee members. Public speakers are limited to three minutes or fewer per person. Selection Committee members also may provide information and announcements under this agenda item.

4. | ADJOURNMENT

+ next to an item indicates an attachment
APPOINTMENT OF MEMBERS FOR THE TransNet INDEPENDENT TAXPAYER OVERSIGHT COMMITTEE

Introduction

In accordance with the TransNet Extension Ordinance, an Independent Taxpayer Oversight Committee (ITOC) was established to provide an enhanced level of accountability for expenditures made under the Expenditure Plan. The membership of the ITOC consists of seven voting members, each of whom represents a specified area of expertise (Attachment 1). The length of the term is determined by the ITOC Selection Committee at the time of appointment. The terms for three of the seven ITOC positions expire in May 2017.

For the position for a professional with experience in the management of construction projects, the incumbent has requested reappointment. The incumbent in the position for a senior-level, chief executive officer of a major private sector employer also submitted an application for consideration by the Selection Committee. Due to term limits, the position for a professional with experience in real estate, land economics, and/or right-of-way acquisition is vacant.

The ITOC selection process consists of two steps:

1. Review by a Technical Screening Committee, which is responsible for reviewing applications received from interested individuals and recommending two candidates for open positions; and

2. Approval by a Selection Committee that is responsible for selecting the ITOC member from the list of qualified candidates recommended by the Technical Screening Committee.

Requested Actions

Pursuant to the TransNet Extension Ordinance, the Selection Committee is asked to: 1) approve the reappointment of Brad Barnum for an additional four-year term to continue serving in his current position through May 2021; 2) approve the appointment of Dick Vortmann for an additional four-year term to continue serving in his current position through May 2021; and 3) consider the candidates and approve the selection of one ITOC member for the position of a professional with demonstrated experience of ten years or more in real estate, land economics, and/or right-of-way acquisition through May 2020.
**Discussion**

Attachment 2 is an excerpt from the *TransNet* Extension Ordinance and Expenditure Plan, which includes the description of the roles and responsibilities of the ITOC, as well as the role of the Technical Screening Committee and Selection Committee in the selection process for the ITOC members.

Consistent with the *TransNet* Extension Ordinance, the Technical Screening Committee reviewed all candidate applications received by the submittal deadline. The Technical Screening Committee's recommendations for each position along with the applications for the recommended candidates are included as Attachment 3.

**Technical Screening Committee Recommendations**

**Reappointment**

For a member eligible to serve for an additional four-year term, an application for reappointment to continue as a member of the ITOC must be submitted to the Selection Committee for approval at least 120 days prior to the end of the member's current term.

Consistent with the *TransNet* Extension Ordinance, an eligible incumbent member submitted an application for reappointment for an additional four-year term by the February 1, 2017, submittal deadline as follows:

- **Brad Barnum** — a professional with demonstrated experience of ten years or more in the management of large-scale construction projects

Should the Selection Committee not approve the requested reappointment, the ITOC position will be considered vacant at the end of the current term. The selection process for a new member would be initiated, including requesting applications through an open, publicly noticed solicitation process. A Technical Screening Committee would be established to review applications received from interested individuals and recommend qualified candidates for consideration by the Selection Committee.

**Appointments**

Pursuant to the *TransNet* Extension Ordinance, the following position was publicly noticed, and one application was received from the incumbent currently serving in the position as follows:

- **Dick Vortmann** — a chief executive officer or person in a similar senior-level, decision-making position of a major private sector employer with demonstrated experience in leading a large organization

The ITOC Bylaws state that the Selection Committee will be notified when an applicant does not meet the established standard for attendance. For calendar year 2016, Mr. Vortmann attended less than half of the regular ITOC meetings. As part of its review, the Technical Screening Committee considered Mr. Vortmann’s contributions to the ITOC as part of its recommendation (Attachment 3).
Two applications were received for the following publicly noticed ITOC position:

- A professional with demonstrated experience of ten years or more in real estate, land economics, and/or right-of-way acquisition

In its review, the Screening Committee considered factors such as the applicant’s quality of the responses to the questions in the application, the depth of experience of each applicant, the level of demonstrated understanding of the role of the ITOC, and the type of skills that the applicant would bring to the ITOC. The Technical Screening Committee recommends both candidates be advanced for consideration by the Selection Committee based on their qualifications:

- **Kaitlin Murphy Arduino** — Technical Screening Committee members provided comments on Ms. Arduino’s extensive experience in commercial real estate development, understanding of city and state development permitting and regulations, and familiarity with transportation infrastructure projects funded by TransNet. The Committee also took into consideration Ms. Arduino’s relevant educational background.

- **Jessica Demirdjian** — Technical Screening Committee members commented on Ms. Demirdjian’s experience as a broker and realtor, as well as her interest in learning, experiencing, and being more actively involved on issues important to the community. The Committee noted Ms. Demirdjian’s academic background and level of exposure to transportation in general.

The Technical Screening Committee’s recommendation for this position also is included in Attachment 3. All candidates have been notified of the May 26, 2017, Selection Committee meeting and are scheduled to attend either by phone or in person.

**Independent Taxpayer Oversight Committee Term Limits**

At its March 24, 2017, meeting, the Board of Directors, acting as the San Diego County Regional Transportation Commission, amended the TransNet Extension Ordinance to further stagger ITOC terms to prevent turnover of more than two members at any one time and to allow members filling mid-term vacancies to serve an additional two four-year terms (not to exceed a total of ten years). In addition, the TransNet Extension Ordinance amendment acknowledged that if more than two members need to be replaced during the same recruitment period, the Selection Committee would determine the length of the members’ first term in order to limit concurrent future turnover. A listing noting current term expirations for ITOC positions is included below.

<table>
<thead>
<tr>
<th>Terms expiring May 2017</th>
<th>Terms expiring May 2019</th>
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<tbody>
<tr>
<td>A professional with experience in the management of large-scale construction projects</td>
<td>A professional in the field of municipal/public finance and/or budgeting</td>
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<tr>
<td>A professional with experience in real estate, land economics, and/or right-of-way acquisition</td>
<td>A professional in biology or environmental science</td>
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<tr>
<td>A chief executive officer or person in a similar senior-level, decision-making position of a major private sector employer</td>
<td>A licensed engineer with appropriate credentials in the field of transportation project design or construction</td>
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<td>A licensed architect, civil engineer, or traffic engineer</td>
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In accordance with the TransNet Extension Ordinance, ITOC members are to serve a term of four years, except that appointments may be less than four years in order to ensure the terms of the ITOC members are sufficiently staggered. The TransNet Extension Ordinance also states that ITOC members shall serve no more than eight years unless the member’s first term was less than four years, in which case the member may serve an additional two terms after the partial term. In no case, however, shall any member serve more than ten years on the ITOC.

The ITOC member currently serving in the chief executive officer position, Mr. Vortmann, was originally appointed to fill a mid-term vacancy in November 2011 and subsequently reappointed in May 2013. Consistent with the requirement to serve no more than ten years total, the appointment of Mr. Vortmann by the Selection Committee through May 2021 would constitute a total of nine and a half years.

Pending the Selection Committee’s approval of the recommendations provided by the Technical Screening Committee, term expirations going forward could result in the scenario shown below. Alternatively, for the three positions expiring this month, Selection Committee members could elect to stagger terms differently than proposed below.

Determination of the length of terms for the four positions expiring May 2019 could be considered by the Selection Committee as part of the May 2019 solicitation process to ensure that term expirations do not result in more than two vacancies at any one time going forward from that point.

<table>
<thead>
<tr>
<th>Terms expiring May 2020</th>
<th>Terms expiring May 2019</th>
<th>Terms expiring May 2021</th>
</tr>
</thead>
<tbody>
<tr>
<td>A professional with experience in real estate, land economics, and/or right-of-way acquisition</td>
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Next Steps

Following the Selection Committee’s approval, all applicants would be notified of the final selection results. The successful candidates would attend their first ITOC meeting on June 14, 2017.

Attachments: 1. Current Membership on the ITOC
         2. ITOC Overview (Excerpts from TransNet Extension Ordinance and Expenditure Plan)
         3. Memorandum dated May 12, 2017, from the Technical Screening Committee to the Selection Committee and Applications for the Recommended Candidates

Key Staff Contact: Ariana zur Nieden, (619) 699-6961, ariana.zurnieden@sandag.org
Current Membership on the
TransNet Independent Taxpayer Oversight Committee

Terms expiring May 2017

- **Brad Barnum**: Mr. Barnum is serving in the Independent Taxpayer Oversight Committee (ITOC) position for a professional with experience in the management of large-scale construction projects. He has more than 13 years of experience in various aspects of the construction industry, including bidding practices, specifications content, project delivery methods, payment schedules, inspector methods, change order procedures, contracts, safety, and labor compliance. Mr. Barnum has served as Vice President of Government Relations of the Associated General Contractors in San Diego for the past 12 years. He is a Torrey Hills resident working in Sorrento Valley.

- **Carolyn Lee**: Ms. Lee is serving in the ITOC position for a professional with experience in real estate, land economics, and/or right-of-way acquisition. Ms. Lee draws upon her experience in supervising capital and support budgets with multiple funding sources in fulfilling her oversight role on the ITOC. She lives in the Tierrasanta area of San Diego.

- **Richard Vortmann**: Mr. Vortmann is serving in the ITOC position for a chief executive officer or person in a similar senior-level, decision-making position, of a major private sector employer with demonstrated experience in leading a large organization. He has over 30 years of experience in the fields of financial management and strategic planning, including over 22 years as President of National Steel and Shipbuilding Company and six years as Vice President of General Dynamics Corporation. He has served as a member of numerous boards including the San Diego Regional Economic Development Corporation and Scripps Health, among others. Most recently, he also served as Interim President and Chief Executive Officer of the San Diego Regional Chamber of Commerce. Mr. Vortmann lives in the La Jolla area of San Diego.

Terms expiring May 2019

- **Stewart Halpern, ITOC Chair**: Mr. Halpern is serving in the ITOC position for a professional in the field of municipal/public finance and/or budgeting with a minimum of ten years in a relevant and senior decision-making position in the public or private sector. He has over 30 years of experience in various aspects of financial decision-making, managing external auditors, budgeting, and financial analysis. Mr Halpern has served as a senior financial executive for major Wall Street firms with a focus on tax-exempt entity financing. He currently serves as a member of the Board of Directors of San Diego Coastkeeper. Mr. Halpern lives and works in the La Jolla area of San Diego.

- **Dustin Fuller, ITOC Vice Chair**: Mr. Fuller is serving in the ITOC position for a professional in biology or environmental science with demonstrated experience in environmental regulations and major project mitigation requirements and/or habitat acquisition and management. He is a Senior Environmental Planner with the 22nd District Agricultural Association. Mr. Fuller has more than 15 years of experience in the environmental planning field, including coordination with resource agencies, preparation of environmental documents, and permit processing. He currently serves as a member of the Association of Environmental Professionals. Mr. Fuller is a Clairemont resident working in Del Mar.

- **Kai Ramer**: Mr. Ramer is serving in the ITOC position for a licensed engineer with appropriate credentials in the field of transportation project design or construction and a minimum of ten years of experience in a relevant and senior decision-making position in the government or private sector. He is a principal for Rick Engineering Company and has over 25 years of experience in the field of transportation engineering. He has served on the Santee School District Independent Citizens’ Oversight Committee and as past president of the San Diego Highway Development Association. He is currently a member of the San Diego County Taxpayers Association. Mr. Ramer is a Santee resident working in Mission Valley.

- **Jonathan Tibbitts**: Mr. Tibbitts is serving in the ITOC position for a licensed architect or civil/traffic engineer with experience in transportation and/or urban design. He is a registered civil engineer (retired) with over 20 years of experience, including construction management and service as Commander with the U.S. Navy Civil Engineer Corps. Mr. Tibbitts lives in the Kensington area of San Diego.
INDEPENDENT TAXPAYER OVERSIGHT COMMITTEE
Overview
Responsibilities
The Independent Taxpayer Oversight Committee (ITOC) responsibilities will include the following:

- Conduct an annual fiscal and compliance audit of all TransNet-funded activities using the services of an independent fiscal auditor to ensure compliance with the voter-approved Ordinance and Expenditure Plan.
- Prepare an annual report to the SANDAG Board of Directors presenting the results of the annual audit process.
- Conduct triennial performance audits of SANDAG and other agencies involved in the implementation of TransNet-funded projects and programs to review project delivery, cost control, schedule adherence, and related activities.
- Provide recommendations to the SANDAG Board of Directors regarding any proposed amendments to the TransNet Ordinance and Expenditure Plan.
- Provide recommendations as part of the required 10-year review process. This process provides an opportunity to undertake a comprehensive review of the TransNet program every ten years and to make recommendations for improving the program over the subsequent ten years.
- Participate in the ongoing refinement of the SANDAG transportation system performance measurement process and the project evaluation criteria used in development of the Regional Transportation Plan and in prioritizing projects for funding in the Regional Transportation Improvement Program.
- On an annual basis, review ongoing SANDAG system performance evaluations, including the “State of the Commute” report, and provide an independent analysis of information included in that report.
- Review and comment on the programming of TransNet revenues in the Regional Transportation Improvement Program.
- Review proposed debt financings to ensure that the benefits of the proposed financing for accelerating project delivery, avoiding future cost escalation, and related factors exceed issuance and interest costs.
- Review the major Congestion Relief projects identified in the Ordinance for performance in terms of cost control and schedule adherence on a quarterly basis.

In carrying out its responsibilities, ITOC shall conduct its reviews in such a manner that does not cause unnecessary project delays, while providing sufficient time to ensure that adequate analysis can be completed to allow ITOC to make objective recommendations and to provide the public with information about the implementation of the TransNet program.
Membership

- A professional in the field of municipal/public finance and/or budgeting with a minimum of ten years in a relevant and senior decision-making position in the public or private sector. (Term expires May 2019)

- A licensed architect, civil engineer, or traffic engineer with demonstrated experience of ten years or more in the fields of transportation and/or urban design in government or the private sector. (Term expires May 2019)

- A professional with demonstrated experience of ten years or more in real estate, land economics, and/or right-of-way acquisition. (Term expires May 2017)

- A professional with demonstrated experience of ten years or more in the management of large-scale construction projects. (Term expires May 2017)*

- A licensed engineer with appropriate credentials in the field of transportation project design or construction and a minimum of ten years’ experience in a relevant and senior decision-making position in the government or private sector. (Term expires May 2019)

- A chief executive officer or person in a similar senior-level decision-making position of a major private sector employer with demonstrated experience in leading a large organization. (Term expires May 2017)

- A professional in biology or environmental science with demonstrated experience of ten years or more with environmental regulations and major project mitigation requirements and/or habitat acquisition and management. (Term expires May 2019)

Positions shown in bold type will be considered during the May 2017 solicitation process.

* The ITOC member currently serving in this position submitted an application for reappointment to continue as a member of the ITOC for Selection Committee approval.

Additional Term

For a member eligible to serve for an additional four year term, an application for reappointment to continue as a member of the ITOC must be submitted to the Selection Committee for approval at least 120 days prior to the end of the member’s current term. If the Selection Committee does not approve the additional term, the position will be considered vacant at the end of the member’s current term and the selection process for a new member will be initiated.
**Selection Process**

A technical screening committee will be established to review applications received from interested individuals. This committee will consist of three members selected by the SANDAG Executive Director from high-level professional staff of local, regional, state, or federal transportation agencies outside of the San Diego region, or from one of the region’s colleges or universities in a transportation-related field, or a combination thereof. The committee will develop a list of candidates determined to be qualified to serve on ITOC based on the criteria established for the open ITOC position(s). The technical screening committee will recommend two candidates for each open position from the list of qualified candidates for consideration by the Selection Committee.

A selection committee shall be established to select an ITOC member from the list of qualified candidates recommended by the technical screening committee. The selection committee shall consist of the following: two members of the County of San Diego Board of Supervisors; the mayor of the City of San Diego; a mayor from the Cities of Chula Vista, Coronado, Imperial Beach, or National City selected by the mayors of those cities; a mayor from the Cities of El Cajon, La Mesa, Lemon Grove, or Santee selected by the mayors of those cities; a mayor from the Cities of Carlsbad, Del Mar, Encinitas, Oceanside, or Solana Beach selected by the mayors of those cities; and a mayor from the Cities of Escondido, Poway, San Marcos, or Vista selected by the mayors of those cities.

All meetings of the selection committee shall be publicly noticed and conducted in full compliance with the requirements of the Brown Act. Should the selection committee be unable to reach agreement on a candidate from the qualified candidates recommended by the technical screening committee, the selection committee shall request the technical screening committee to recommend two additional qualified candidates for consideration.

**Conflict of Interest**

ITOC members shall be subject to SANDAG’s conflict of interest policies. ITOC members shall have no legal action pending against SANDAG and are prohibited from acting in any transactions directly or indirectly involving SANDAG, such as being a consultant to SANDAG or to any party with pending legal actions against SANDAG during their tenure on ITOC. ITOC members also are prohibited from having a direct financial interest or employment with any private entity or public agency division which receives TransNet sales tax funds.
May 12, 2017

TO: Selection Committee for the TransNet Independent Taxpayer Oversight Committee

FROM: Technical Screening Committee

SUBJECT: Recommendation of TransNet Independent Taxpayer Oversight Committee Candidates

As required by the TransNet Extension Ordinance, a Technical Screening Committee composed of the following members was formed to provide recommendations to the Selection Committee regarding candidates for the TransNet Independent Taxpayer Oversight Committee (ITOC):

- Kome Ajise, Chief Deputy Director for Caltrans
- Mark Baza, Executive Director for Imperial County Transportation Commission
- Gary Matthews, Vice Chancellor, Resource Management Planning at University of California, San Diego

Consistent with the TransNet Extension Ordinance, the Technical Screening Committee reviewed all candidate applications received by the April 26, 2017, submittal deadline. Four applications were received for the following three positions on the ITOC:

- A professional with demonstrated experience of ten years or more in the management of large-scale construction projects
- A chief executive officer or person in a similar senior-level, decision-making position of a major private sector employer with demonstrated experience in leading a large organization
- A professional with demonstrated experience of ten years or more in real estate, land economics, and/or right-of-way acquisition

Reappointment

For a member eligible to serve for an additional four-year term, an application for reappointment to continue as a member of the ITOC must be submitted to the Selection Committee for approval at least 120 days prior to the end of the member’s current term.
Consistent with the TransNet Extension Ordinance, no member can serve more than eight years on the ITOC. The ITOC member currently serving in the position below is eligible to serve another four-year term and submitted an application for reappointment by the February 1, 2017, submittal deadline to continue as a member of the ITOC for Selection Committee approval as follows:

- **Brad Barnum** — a professional with demonstrated experience of ten years or more in the management of large-scale construction projects

The Technical Screening Committee considered Mr. Barnum’s strong qualifications and relevant work with local agencies to streamline processes for public works projects. The Technical Screening Committee also noted his prior experience serving both as chair of the ITOC and chair of the most recent ITOC performance audit subcommittee. His participation as a member of the San Diego Regional Chamber of Commerce Infrastructure, Housing, and Land Use Committee and the Board of Directors of the San Diego County Taxpayers Association also was noted. The Technical Screening Committee recommends the reappointment of Mr. Barnum for consideration by the Selection Committee.

**Appointments**

One application was received for the position noted below:

- **Dick Vortmann** — a chief executive officer or person in a similar senior-level, decision-making position of a major private sector employer with demonstrated experience in leading a large organization

While the applicant for this position is a current ITOC member, the submittal is not considered a reappointment as described above. Mr. Vortmann’s first term on the ITOC began in November 2011 to fill a mid-term vacancy. In May 2013, he was reappointed for a four-year term. In March 2017, the Board of Directors approved an amendment to the TransNet Extension Ordinance to further stagger member terms and allow members filling mid-term vacancies to serve for up to ten years. After the Board of Directors’ approval of the amendment, Mr. Vortmann was eligible to apply for another four-year term.

In its review, the Technical Screening Committee commented on Mr. Vortmann’s strong qualifications and extensive experience in leading a major organization and managing large financings. The Technical Screening Committee took into consideration Mr. Vortmann’s prior experience serving on the ITOC. In addition, the Technical Screening Committee considered his experience having served as a member of the ITOC fiscal and compliance audit subcommittee.

Mr. Vortmann also serves on the National Sea Grant Advisory Board (Advisory Board). During calendar year 2016, some of the meetings of the Advisory Board conflicted with the ITOC meeting schedule. As part of its review, the Technical Screening Committee was informed of Mr. Vortmann’s attendance at ITOC meetings.

The ITOC Bylaws state:

*C. 3. Removal from Membership: Members of the ITOC may be removed for cause including the member’s failure to attend more than 50% of the regular ITOC meetings, not including special meetings or subcommittee meetings, in one calendar year... The Selection Committee will be automatically notified when an ITOC member has failed to meet the established standard for attendance and will consider any appeal or review of extenuating circumstances prior to initiating the process to select a new member.*
For calendar year 2016, Mr. Vortmann attended less than half of the regular ITOC meetings. While he continues to serve on the Advisory Board, going forward meeting schedules are not anticipated to conflict to the same extent, and so far for calendar year 2017, Mr. Vortmann has attended three of the four meetings held. The Technical Screening Committee took this into consideration as part of its review, noting Mr. Vortmann’s valuable contributions to the ITOC and willingness to commit time and stay engaged. The Technical Screening Committee recommends the appointment of Mr. Vortmann for Selection Committee consideration.

Two applications were received for the following position:

- A professional with demonstrated experience of ten years or more in real estate, land economics, and/or right-of-way acquisition

In its review, the Technical Screening Committee considered factors such as the applicant’s quality of the responses to the questions in the application, the depth of experience of each applicant, the level of demonstrated understanding of the role of ITOC, and the type of skills that the applicant would bring to ITOC. The Technical Screening Committee recommends both candidates be advanced for consideration by the Selection Committee based on their qualifications:

- Kaitlin Murphy Arduino — Technical Screening Committee members provided comments on Ms. Arduino’s extensive experience in commercial real estate development, understanding of city and state development permitting and regulations, and familiarity with transportation infrastructure projects funded by *TransNet*. The Technical Screening Committee also took into consideration Ms. Arduino’s relevant educational background.

- Jessica Demirdjian — Technical Screening Committee members commented on Ms. Demirdjian’s experience as a broker and realtor, as well as her interest in learning, experiencing, and being more actively involved on issues important to the community. The Technical Screening Committee noted Ms. Demirdjian’s academic background and level of exposure to transportation in general.

AZU/hbr
Applicant name: Brad Barnum

Position applied for: Construction Project Management
APPLICATION FORM FOR THE
INDEPENDENT TAXPAYER OVERSIGHT COMMITTEE
May 2017

Name: Brad Barnum
Phone: 858-350-9054
Address: 4179 Misty Ridge
San Diego, CA 92130
E-mail address: bbarnum@agcsd.org

1. Why are you interested in serving on the Independent Taxpayer Oversight Committee (ITOC)?

I am seeking re-appointment to ITOC. I would like to continue monitoring the progress and effectiveness of TransNet, and make sure SANDAG, and its member agencies get the most out of every construction dollar. As the lead ITOC member for the most recent triennial performance audit, I would like to see the implementation of some of the audit’s key recommendations, and address other operational improvements as needed.

2. What professional skills and abilities would you bring to the committee, and how would they benefit ITOC?

I act as staff liaison to a number of industry committees within the AGC that meet regularly with public agencies, including Caltrans and SANDAG. I participate in the Regional Construction Procurement Committee (RCPC), which consists of the facilities directors from a number of local public agencies. The RCPC collaborates on streamlining processes, coordinating schedules, and focusing on shared information that may improve bidding and design issues for public works. I’m a member of the San Diego Regional Chamber of Commerce Infrastructure, Housing & Land Use Committee, and I sit on the Board of Directors of the San Diego County Taxpayers Association.

3. Describe the nature of your professional experience as related to the category you are seeking reappointment for, including the number of years of experience you have in that area.

As Executive Vice President of the Associated General Contractors, I bring nearly 16 years of experience in the local construction industry. I have been involved in all aspects of the construction industry, and I understand the impacts on contractors, public and private owners, and taxpayers.

4. What do you hope to accomplish by your participation in ITOC? See Question #1.

5. In what part(s) of the region do you live and work? Torrey Hills in the City of San Diego.
From 2001-2015, Brad Barnum served as the Vice President Government Relations for the Associated General Contractors of America (AGC), San Diego Chapter, Inc. In 2016, he was promoted to Executive Vice President. AGC San Diego represents over 1,100 members who perform over 85% of the region’s commercial, industrial, institutional, general engineering, and heavy highway construction. AGC members are the primary builders of the region’s infrastructure.

Mr. Barnum is responsible for AGC’s local government relations and political action activities. He acts as staff liaison with AGC’s lobbying efforts in the State Legislature and in Congress. He also handles candidate endorsements and political fundraising.

Prior to AGC, Mr. Barnum worked for the San Diego Chapter of the National Electrical Contractors Association. From 1985 to 1998, he worked in the Governor Deukmejian and Governor Wilson Administrations. As the Director of Advance for Governor Deukmejian, he handled all meeting planning, media arrangements, and public affairs activities for the Governor’s travel. During the Wilson Administration, he worked as staff to the California Public Utilities Commission in the areas of public affairs and government relations.

Mr. Barnum is a Member of the San Diego Association of Governments’ TransNet Independent Taxpayer Oversight Committee, and a member of the San Diego Regional Chamber of Commerce Infrastructure, Housing & Land Use Committee. He sits on the Board of Directors for the San Diego County Taxpayers Association.
References for Brad Barnum

Haney Hong
President & CEO
San Diego County Taxpayers Association
619-234-6423
hdhong@sdcta.org

Aimee Faucett
Executive Vice President & COO
San Diego Regional Chamber of Commerce
619-544-1380
afaucett@sdchamber.org

Bob Kiesling
Former Executive Director Facility Management
Grossmont Union High School District
619-571-1691
kieslingrobert@gmail.com
Applicant name: Richard Vortmann

Position applied for: Private Sector Senior Decision Maker
APPLICATION FORM FOR THE
INDEPENDENT TAXPAYER OVERSIGHT COMMITTEE
May 2016

Name: Richard Vortmann

Phone Number: (858) 740 6441

Address: 7715 Hidden Valley Crt
La Jolla, Ca 92037

E-mail address: Dvortmann@gmail.com

(Please make responses as concise as possible — applications will not be judged on length of response. In addition, please attach a copy of your résumé with your application submittal to the attention of Ariana zur Nieden via e-mail Ariana.zurNieden@sandag.org or via fax (619) 699-1905).

1. Why are you interested in serving on the Independent Taxpayer Oversight Committee (ITOC)?
I am currently serving on the Committee. I have found it interesting and therefore I am desirous of continuing my role.

2. What professional skills and abilities would you bring to the committee, and how would they benefit ITOC? My 22 years as a CEO of a large local corporation (NASSCO, a $1 Billion 5,000 employee company) well matches the position requirements. My specific experience in the management of large dollar engineering and construction projects is highly relevant to the ITOC's responsibilities. My experience in large financings is also quite relevant.
3. The current ITOC vacancies are in the following categories. Please check the category(ies) you are applying for:

☐ A professional with demonstrated experience of ten years or more in real estate, land economics, and/or right-of-way acquisition. (Term expires May 2017)

☐ A professional with demonstrated experience of ten years or more in the management of large-scale construction projects. (Term expires May 2017)

X ☐ The chief executive officer or person in a similar senior-level decision making position, of a major private sector employer with demonstrated experience in leading a large organization. (Term expires May 2017)

4. Describe the nature of your professional experience as related to the category(ies) you are applying for, including the number of years of experience you have in that area. Please see the attached resume for details.

5. What do you hope to accomplish by your participation in ITOC? To continue to represent the San Diego County taxpayers in assuring that the TRANSNET ordinance is being properly followed and that their tax dollars are efficiently and effectively utilized.

6. In what part(s) of the region do you live and work? La Jolla
RICHARD H. VORTMANN

Richard H. Vortmann retired after a 30-year career with National Steel and Shipbuilding Company (NASSCO) based in San Diego, California (a 5,000 employee, $1 billion company) where he served as President for 22 years. He also retired after six years as Vice President of General Dynamics Corporation (GD). He most recently completed an assignment as Interim President and CEO of the San Diego Regional Chamber of Commerce.

General Dynamics acquired NASSCO in 1998. For the ten years prior to the GD acquisition, Vortmann had been Chairman, President and CEO of NASSCO, which was then an employee-owned business.

Vortmann began his career in 1969, serving in various financial management and strategic planning positions with Kaiser Industries Corporation, Oakland, California, the then managing owner of NASSCO. He joined NASSCO in 1976 as Vice President of Finance and Information Systems. He later served as Vice President of Production before becoming Executive Vice President of Operations in 1980. He became President of NASSCO in 1984. From 1987 to 1988, he was a member of the Board of Directors of Morrison-Knudsen Corporation (M-K), an international engineering and construction company, which was then NASSCO’s parent company. From 1987 to 1988 he also served as Chairman of the Board of Einkay Development, a real estate development subsidiary of M-K. In 1988 he led the Management-ESOP purchase of NASSCO from M-K.

Vortmann recently completed a 7-year term on the Board (including 2 years as Chairman) of Scripps Health, a $2 billion San Diego hospital system; Vortmann is a member of the Dept. of Commerce Sea Grant College Advisory Board, and a Member of Council, American Bureau of Shipping. He is a Trustee on the $8 billion San Diego County Employees Retirement System. Previously Vortmann served as Chairman of both the American Shipbuilders Association and the Shipbuilders Council of America, and Vice Chairman of the National Academies of Science Marine Board. For 14 years he was the Chairman of the American delegation to the Japanese, European, Chinese, Korean, and United States Annual Shipbuilding Conference (JECKU). He also served as a Director of the San Diego Chamber of Commerce and the San Diego Economic Development Corporation. He was a Trustee of the $3 billion San Diego City Employees Retirement System, a member of the San Diego Mayor’s Blue Ribbon Finance Committee, and Vice Chair of the San Diego Pension Reform Committee.

Vortmann was born in San Francisco, California. He earned a Bachelor’s degree in finance in 1966 and an MBA in 1967 from the University of California, Berkeley, for whom he also played basketball. He taught on the Business School faculty of his alma mater from 1967 to 1969 while doing postgraduate work before entering private industry.
References for Richard Vortmann

Stewart Halpern  
ITOC Chair  
(619) 261-4417  
stewartahalpern@yahoo.com

Brad Barnum  
ITOC Member  
(858) 558-7444  
bbarnum@agcsd.org

Carolyn Lee  
ITOC Member  
(858) 277-8180  
carolynlee@san.rr.com
Applicant name: Kaitlin Murphy Arduino

Position applied for: Real Estate/Right-of-Way Acquisition
APPLICATION FORM FOR THE
INDEPENDENT TAXPAYER OVERSIGHT COMMITTEE
May 2017

Name: Kaitlin Murphy Arduino  
Phone: 619-710-8000 x.15

Address 1: 2750 Womble Rd.  
Email: karduino@murphydev.com

Address 2: Suite 102

City, State, ZIP: San Diego, CA 92116

Please make responses as concise as possible—applications will not be judged on length of response. In addition, please include your résumé and three references with your application submittal to the attention of Veronica Serrano at veronica.serrano@sandag.org or via fax at (619) 699-1905.

1. Why are you interested in serving on the Independent Taxpayer Oversight Committee (ITOC)?

SANDAG has a large responsibility with regard to TransNet proceeds and where they are directed; I am interested in providing assistance for the oversight and accountability for these decisions, especially with my experience in managing large scale development projects. I hope to use my background to ensure that the agency is being prudent with its resources, and that the cost estimates for the large scale projects are as accurate as possible.

Transportation is such a key element for the real estate industry, and for San Diego in general. I have observed as a developer in an area that is lacking in transportation infrastructure, and through my involvement in the Otay Mesa Property Owners Association, how SANDAG investments have the ability to successfully change our region (ie. SR 11, SR 905 and the purchase of the 125). I would love to be of service to this organization and play a role in how its financial decisions impact the way our City thrives and grows. I also look forward to the opportunity to sit at the table with other stakeholders and learn from their expertise.

2. What professional skills and abilities would you bring to the committee, and how would they benefit the ITOC? I am a commercial real estate professional with 15 years experience in the industry. On a day to day basis I evaluate budgets and cash flows, and make decisions regarding the highest and best use for our investment dollars. I manage our team including general contractor, engineers, attorneys, and other land use professionals. I want to use that experience to evaluate whether SANDAG is managing projects well and being transparent about their procedures.

As a developer, I am aware of the challenges presented by City and State regulations for development to occur. SANDAG has to comply with these same regulations and navigate these challenges when building new projects. I communicate and work with members of City Hall often, particularly in DSD and the Mayor’s office. I currently am on the board of the San Diego Chamber Young Leaders, have participated in the NAIOP Board, sit on the Mayor’s Otay Mesa Southbound Truck Route Working Group and have been co-chair of the NAIOP Developing Leaders Council, so I am familiar with a typical board/committee process, and have no qualms about speaking up in a group. I enjoy bouncing ideas off of others in group settings. My leadership skills have further been honed as Vice Chair of the Otay Mesa Property Owners Association, as
well as various extracurricular groups which I lead. I volunteer with the Catholic Diocese of San Diego on their finance committee, where we provide recommendations and informally audit their financials. This is a skill I can also bring to the ITOC committee.
3. The two current ITOC vacancies are in the following categories. Check the box of the category you wish to apply for and describe the nature of your professional experience as related to that category, including the number of years of experience you have in that area.

- A professional with demonstrated experience of ten years or more in real estate, land economics, and/or right-of-way acquisition

- A chief executive officer or person in a similar senior-level decision-making position, of a major private sector employer with demonstrated experience in leading a large organization

As mentioned, I have been active in the commercial real estate industry for 15 years. As Executive Vice President and Partner for Murphy Development Company ("MDC"), a local developer of multiphase corporate industrial and technology parks, I handle the construction project management, land acquisition, financing and entitlements for my company. I am currently project managing our recent acquisition of Panasonic’s 37-acre campus on Otay Mesa, where we are performing a complete renovation of two industrial buildings totaling 530,000 SF, site and landscaping. I helped procure the acquisition financing for this large industrial campus as well. Additionally, I served as project manager for our 122,000 SF speculative industrial development in Otay Mesa at Siempre Viva Business Park, completed in Q3 2016. I have managed our 50 acre grading operation at Brown Field Technology Park which has been ongoing since 2011. I am familiar with the City permit process and entitlement. I have been at MDC since 2009.

In my previous job, I arranged debt and equity for developers and investors of real estate, so I have a good handle on the financing side of the industry, and am comfortable with numbers, pro formas and budgets.

4. What do you hope to accomplish by your participation in the ITOC?

In reading the responsibilities of the ITOC, I am most intrigued by the following: Participate in the ongoing refinement of the SANDAG transportation system performance measurement process and the project evaluation criteria used in development of the Regional Transportation Plan and in prioritizing projects for funding in the Regional Transportation Improvement Program.

I am interested in learning how SANDAG evaluates the various projects throughout our region because funds are limited and the needs are significant. These decisions by the board need to be transparent and clearly communicated to the public. I am interested in collaborating with the other ITOC members to make positive and helpful changes, if necessary, so that the TransNet award and process runs at its smoothest, and available funding is maximized for the greatest good.
5. In what part(s) of the region do you live and work, and how did you hear about the current ITOC vacancy?

I live in La Jolla, and work in Point Loma at Liberty Station. Our company owns property in Otay Mesa and Scripps Ranch, both within the City of San Diego. The committee position was brought to my attention through an industry organization, NAIOP (Commercial Real Estate Development Association).
PROFESSIONAL EXPERIENCE

Murphy Development Company (www.murphydev.com)  September 2009 – Present

Executive Vice President

• Direct all development activities for industrial construction and major renovation projects in Otay Mesa for 700,000 SF + portfolio
• Manage and protect entitlements for 60 acres of industrial land, with responsibilities including:
  + Securing the first Business Park-Residential Permitted zoning implemented in the City of San Diego and its respective CPIOZ for a 25 acre piece of land;
  + Project manager for grading operation on 50-acre Brown Field Technology Park;
  + Process and obtain various permits through the City of San Diego, Otay Water District and Cal Trans;
  + Organize and conduct high level meetings with U.S., state and city representatives
• Create budgets and manage cash flows for various real estate LLC entities
• Procure financing and manage debt obligations for company assets, including 160,000 SF manufacturing facility, 30 acre land acquisition and 530,000 SF industrial campus
• Perform financial analysis and make offers on new investment opportunities


Associate Director

• Originated commercial real estate loans in excess of $90 million
• Arranged debt and equity placements with various investors including life insurance companies, commercial and investment banks, CMBS/conduit lenders, government agencies, private equity investors and pension fund advisors
• Trained three new analysts in standard underwriting practices and research methodologies


• Performed financial analysis through underwriting more than $1.5 billion in financing transactions including fixed rate, floating rate, mezzanine and construction debt as well as joint venture, preferred equity and entity-level capital raising
• Created various marketing packages for submission to lenders using a combination of Microsoft Word, Excel, Publisher and Power Point, Adobe Acrobat and Argus Software

EDUCATION


MSc Real Estate Economics and Finance, with Distinction
Courses include Applied Urban and Regional Economics, Asset Markets, Real Estate Finance and Real Property Market Practice

University of Arizona, Tucson, AZ.  May 2003

B.S. in Business Administration, Summa Cum Laude
Major: Finance; GPA: 4.0  Minor: Spanish; GPA: 4.0
Cumulative GPA: 3.97
Full Academic Scholarship
Courses include Corporate Finance, International Finance, Micro/Macro Economics, Accounting, Business Management

University of Wisconsin, Platteville Study Abroad Program  Spring 2002

Spanish American Institute, Seville, Spain
MEMBERSHIPS & ASSOCIATIONS

- San Diego Regional Chamber of Commerce: Young Leaders Board member; Mexico City delegation participant 2015-2016
- National Association of Industrial and Office Properties (“NAIOP”): Developing Leaders Council – 2014 Co-Chair; Legislative Committee
- Commercial Real Estate Women (“CREW”) Legacy Member, UCREW committee
- Otay Mesa Planning Group member since 2010
- Otay Mesa Property Owners Association, Vice Chair

LANGUAGES

- English – native language
- Spanish – speak, read and write with proficiency

PERSONAL

- Hobbies: travel, snowboarding, volunteering, music appreciation, yoga, wine tasting

REFERENCES AVAILABLE UPON REQUEST
Kaitlin Murphy Arduino
2750 Womble Rd.
Suite 102
San Diego, CA 92106

References

Pedro Orso Delgado
Under Construction
porso@uconstrucione.com
(619) 598-2063
Consultant to Murphy Development

Jim Roberts, PE
jroberts.rce@outlook.com
(619) 405-8737
Engineering consultant to Murphy Development

R. Michael Murphy
President
Murphy Development Company
rmmurphy@murphydev.com
(619) 710-8000 x.12
Partner at Murphy Development
Applicant name: Jessica Demirdjian

Position applied for: Real Estate/Right-of-Way Acquisition
APPLICATION FORM FOR THE
INDEPENDENT TAXPAYER OVERSIGHT COMMITTEE
May 2017

Name: Jessica Demirdjian                                    Phone: 619-846-7738

Address 1: 402 W Broadway                                    Email: afcinv@gmail.com

Address 2: #400

City, State, ZIP: San Diego, CA 92101

Please make responses as concise as possible—applications will not be judged on length of response. In addition, please include your résumé and three references with your application submittal to the attention of Veronica Serrano at veronica.serrano@sandag.org or via fax at (619) 699-1905.

1. Why are you interested in serving on the Independent Taxpayer Oversight Committee (ITOC)?
   I would like to gain the experience of other committees, other than the Greater San Diego Chamber of Commerce.

2. What professional skills and abilities would you bring to the committee, and how would they benefit the ITOC?
   I have live in San Diego County for the past thirteen years from Pasadena. I would like to learn more and be more active in the policies that are important to the community and are critical to our communities. As the population is growing, this is such an important committee to me.
3. The two current ITOC vacancies are in the following categories. Check the box of the category you wish to apply for and describe the nature of your professional experience as related to that category, including the number of years of experience you have in that area.

- A professional with demonstrated experience of ten years or more in real estate, land economics, and/or right-of-way acquisition

☐ A chief executive officer or person in a similar senior-level decision-making position, of a major private sector employer with demonstrated experience in leading a large organization

I have been licensed as a salesperson since 2006 in Real Estate; I am now a broker and have been active throughout residential and commercial sales and leasing. There are so many factors that come into play; one example is traffic count in a commercial area... this ends up in the decision-making option for the perspective commercial client. On the other hand, residents want to be away from traffic. How do you balance this?

4. What do you hope to accomplish by your participation in the ITOC?

The main focus is to learn and experience more, especially in the community that I live in.
5. In what part(s) of the region do you live and work, and how did you hear about the current ITOC vacancy?

I live and practice in Downtown San Diego. As a broker, I tend to drive all over the county… I learned about the vacancy through the Greater San Diego Chamber of Commerce – Infrastructure Land & Use Committee.
**JESSICA DEMIRDJIAN**  
524 F Street #1  San Diego, CA. 92101 619-846-7738  afcinv@gmail.com

**OBJECTIVE:** To obtain a career-building position that allows me to contribute to corporate success in a team environment, while utilizing my strong work ethic and academic background along with my excellent multi-tasking abilities.

**EDUCATION**  
Point Loma Nazarene University  
Bachelor of Arts: Organizational Management  
May 2017

University of San Diego  
Masters of Accountancy (Candidate)

**REAL ESTATE & ACCOUNTING EXPERIENCE**

**Broker, Realtor, Transaction Coordinator, Director of Operations**  
AMERICA’S FINEST CITY INVESTMENTS, PACIFIC SOTHEBY’S INTERNATIONAL REALTY, PRUDENTIAL CALIFORNIA REALTY – San Diego County, CA  
2006 – Present

- Close transactions based on corporate sales goals and forecasts.  
- Create marketing pieces, hold open houses and network within community to attain sales.  
- Perform Internet research and utilize various databases to locate prospective clients.  
- Develop and maintain effective working relationships with clients and associates.  
- Generate sales reports and assist in month-end sales processing.  
- Maintain client lists, prepare agent files and perform market analysis.

**Accounting Clerk**  
MITEK – San Diego, CA (Contract Position)  
2016 - Present

- Process and distribute checks for vendors and employees; review check requests.  
- Record transactions, posting debits and credits.  
- Reconcile accounts and ensuring accuracy and completeness of data.  
- Maintain petty cash and monitor monthly employee charges.

**Finance Associate**  
CITY OF DEL MAR – Del Mar, CA  
2016 - Present

- Process and distribute checks for vendors and employees; review check requests.  
- Record transactions, posting debits and credits.  
- Reconcile accounts and ensuring accuracy and completeness of data.  
- Maintain petty cash and monitor monthly employee charges.

**Accounts Payable Clerk**  
DEL MAR THOROUGHBRED CLUB -- PRIEMER – Del Mar, CA (Seasonal)  
2016

- Process and distribute checks for vendors and employees; review check requests.  
- Record transactions, posting debits and credits.  
- Reconcile accounts and ensuring accuracy and completeness of data.  
- Maintain petty cash and monitor monthly employee charges.
Treasurer (Church Appointment)
ST. JOHN GARABED ARMENIAN CHURCH – San Diego, CA 2009 - 2013
- Process and distribute checks; review check requests.
- Record transactions, posting debits and credits.
- Reconcile accounts and ensuring accuracy and completeness of data.
- Maintain petty cash and monitor monthly employee charges.

Tax Intern
MOTOROLA MOBILITY - San Diego, CA 2012
- Assist associates in Tax Filing – Federal and State, Accounts Payable and Accounts Receivable Departments.
- Resolve problems for clients regarding Accounts Receivable issues.
- Generate ledger reports.
- Assist in month-end budget processing.
- Generate reports on various software.
- Assign and maintain rate changes and secure contents of safe.

Accounting Intern
WORLD TRADE CENTER - San Diego, CA 2010 - 2011
- Assist associates in Accounts Payable and Accounts Receivable Departments.
- Provide problem resolutions for clients regarding Accounts Receivable issues.
- Generate ledger reports.
- Assist in month-end budget processing.

SPECIAL SKILLS
Certificates:
- PTIN Certified Number P01960667
- Enrolled Agent (In Progress)
- Certified Public Accountant (In Progress)
- California Licensed Real Estate Broker Number 01494094

Computer Skills: Eden, Tyler, QuickBooks, Zipforms, CoStar, AIR Forms, SAGE, SDAR, MLS, NAR (Updates and Market Analysis), RPR (CMA Analysis), Microsoft Office Softwares – including Word, Excel, Outlook, etc. and Internal Accounting and Sales Entry Systems.

Foreign Language: Bilingual fluency in Armenian

MEMBERSHIPS & VOLUNTEER WORK
- Member, San Diego Regional Chamber of Commerce
- Member, The American Institute of CPA’s
- Member, CalCPA
- Member, Government Finance Officers Association
- Member, Commercial Real Estate Alliance, San Diego (205-2016)
- Member, Accounting and Financial Women’s Alliance, San Diego Chapter
- Volunteer, Monarch School, San Diego
References for Jessica Demirdjian

Chris Guzelian – Jefferson Law School – guzelian@pobox.com

Federal Judge Larry Burns – Larry_A_Burns@casd.uscourts.gov

Jerry Sanders – Greater San Diego Chamber of Commerce – jerry@sdchamber.org