Profile

First Name

Last Name

Email Address

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

Which Boards would you like to apply for?

Federated City Employees' Retirement System: Not Submitted

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

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

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

Are you a resident of San Jose?

- Yes
- No

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

Member Category: *

None Selected

Length of Residency

None Selected

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

- Yes
- No
What district do you live in? To verify, please click here: https://eservices.sccgov.org/rov/?tab=dt

None Selected

Street Address
Suite or Apt

City
State
Postal Code

Primary Phone
Alternate Phone

Employer
Job Title

Current Employer Address

Current Employer of Spouse

Address of Current Employer of Spouse

Spouse's Job Title

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

Demographics (Optional)

The demographic information you choose to provide is VOLUNTARY and OPTIONAL. This information will be kept separate from your application and will not be used for evaluating applications or making appointments. The City of San José will use this information to solely conduct research and compile statistical reports regarding the composition of its Board and Commission applicants.

Question applies to multiple boards
Ethnicity

None Selected

To which gender identity do you most identify?

None Selected

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

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

Languages Spoken

Special Awards or Recognitions Received

Please state why you want to become a member of this Board or Commission including specific objectives which you would work toward as a member. If you are applying for the Board of Fair Campaign and Political Practices, please indicate any familiarity or experience you may have with campaign laws.

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

Do you own property in the City of San José?
- Yes  - No

If yes, please list the addresses here.

Do you rent property in the City of San José?
- Yes  - No

If yes, is it a month-to-month lease?
- Yes  - No
State and local law require that you abstain from participation in decisions that may affect your financial interests, including sources of income, interest in real property, personal finances or investments. In addition, if appointed, you may be required to fill out a disclosure statement which identifies certain of your financial interest beginning with the immediate twelve-month period prior to your appointment. Please review the scope of your board/commission in Municipal Code Chapter 2.08. Based on your best judgment, does this Board or Commission make decisions that may affect sources of income, interests in real property, personal finances or investments of you or your spouse?

☐ Yes  ☐ No

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

Question applies to multiple boards

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

☐ Yes  ☐ No

Question applies to multiple boards

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

☐ Yes  ☐ No

Question applies to multiple boards

If yes, please explain in complete detail.

Question applies to multiple boards

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

☐ Yes  ☐ No

Reference 1 Name

Reference 1 Address

Reference 1 Phone
Supplemental Questions

Have you ever attended a meeting of the Commission(s) to which you are applying?

☐ Yes  ☐ No

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

☐ Yes  ☐ No

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

Considering your experience and activities in business, labor, professional, social, or other organizations, indicate the experience, training, knowledge and/or skills which qualify you for appointment to the selected commission(s).

What is your understanding of the purpose of the Commission?

Please list three issues facing the City that you feel the Commission should address.
I would like to say . . .

(Optional) Please upload a resume.

**Retirement Board Questions Only**

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

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

*None Selected*

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

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

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

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

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

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

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

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

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

**Do you believe that the retirement funds that are invested by the retirement boards are public funds? Why or why not?**
Have you read the report by the City Auditor entitled, “Pension Sustainability: Rising Pension Costs Threaten the City’s Ability to Maintain Service Levels?” This report is available at: https://www.sanjoseca.gov/DocumentCenter/View/3208

- Yes  - No

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

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

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

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

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

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

What should be included in a pension plan’s statement of investment policies? Please address the roles of trustees, staff, consultants, investment managers and custodians in asset allocation, portfolio structure, manager selection and due diligence, rebalancing, reporting and analysis.
Individuals applying for appointment as public members of the Board are ineligible for appointment to the Board if they meet certain criteria. Please confirm if you meet any of the following criteria:

None Selected

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

- [ ] Yes  
- [ ] No

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

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

- [ ] Yes  
- [ ] No

If yes, please provide details.

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

- [ ] Yes  
- [ ] No

If yes, please provide details.

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

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

I Agree *