

**CONTRA COSTA CONSORTIUM  
AFFORDABLE HOUSING FINANCE COMMITTEE MEMBERSHIP**

<b>City Representatives</b>	
East County Rep. (City #1)	Term Expires: June 30, 2026
Denarius Daniels Pittsburg, CA	
West County Rep. (City #2)	Term Expires: June 30, 2024
Valerie Bernardo Hercules, CA	
Central County Rep. (City #3)	Term Expires:
Vacant	

<b>County Representatives (Unincorporated)</b>	
East County Rep. (County #1)	Term Expires:
Vacant	
West County Rep. (County #2)	Term Expires: June 30, 2024
Willie Robinson El Sobrante, CA	
Central County Rep. (County #3)	Term Expires:
Vacant	

<b>Community/At-Large Representative</b>	
Community Rep. (Community #1)	Term Expires: June 30, 2025
Sarah Allen Concord, CA	

## COMMITTEE STAFF

Kristin Sherk  
Affordable Housing Program Manager  
Phone: (925) 655-2889  
Email: [Kristin.Sherk@dcd.cccounty.us](mailto:Kristin.Sherk@dcd.cccounty.us)  
Fax: (925) 655-2757

Contra Costa County  
Department of Conservation and Development  
30 Muir Road  
Martinez, CA 94553

# Application Form

## Profile

Waleed

First Name

Akbar

Last Name

Middle Initial

[Redacted] Home Address

State or Zip

San Ramon

City

CA

State

94583

Postal Code

Mobile: [Redacted]

Primary Phone

[Redacted] Email Address

## [District Locator Tool](#)

Resident of Supervisorial District:

None Selected

Everhome Real Estate

Employer

Realtor

Job Title

## Length of Employment

2

Do you work in Contra Costa County?

Yes  No

If Yes, in which District do you work?

Alameda

How long have you lived or worked in Contra Costa County?

6 years

Are you a veteran of the U.S. Armed Forces?

Yes  No

## Board and Interest

Which Boards would you like to apply for?

Affordable Housing Finance Committee: Submitted

**Seat Name**

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**Have you ever attended a meeting of the advisory board for which you are applying?**

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Yes  No

**If Yes, how many meetings have you attended?**

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**Education**

**Select the option that applies to your high school education \***

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High School Diploma

**College/ University A**

**Name of College Attended**

---

San Jose State University

**Degree Type / Course of Study / Major**

---

Bachelor Degree in Finance

**Degree Awarded?**

---

Yes  No

**College/ University B**

**Name of College Attended**

---

**Degree Type / Course of Study / Major**

---

**Degree Awarded?**

---

Yes  No

---

**College/ University C**

**Name of College Attended**

---

**Degree Type / Course of Study / Major**

---

**Degree Awarded?**

---

Yes  No

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## Other Trainings & Occupational Licenses

### Other Training A

---

Real Estate

### Certificate Awarded for Training?

---

Yes  No

### Other Training B

---

### Certificate Awarded for Training?

---

Yes  No

### Occupational Licenses Completed:

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## Qualifications and Volunteer Experience

Please explain why you would like to serve on this particular board, committee, or commission.

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"My passion for affordable housing is deeply personal, rooted in witnessing firsthand the challenges and stresses that families, including my own, face when secure, affordable housing is out of reach. This experience has shaped my commitment to being part of the solution, driving me to apply my background in finance, policy analysis, and healthcare dedication to community service toward making a significant difference in this field. Serving on the Affordable Housing Finance Committee represents a unique opportunity for me to contribute my skills and insights towards creating innovative and compassionate financing solutions that can transform lives. I am eager to leverage this platform to advocate for policies and initiatives that ensure every individual and family has access to safe, affordable housing—a foundation upon which they can build a stable, prosperous future. I am eager to align with your deep values and professional aspirations, and I am committed to bringing my full energy and expertise to help the committee achieve its goals.

Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application)

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With over 18 years of experience in the real estate industry, I have cultivated a profound understanding of the housing market, finance, and the economic factors influencing both urban and suburban development. My background in finance has equipped me with the analytical skills necessary to navigate complex financial landscapes, enabling me to contribute valuable insights into funding strategies and financial planning for affordable housing projects. As a part-owner of a successful business, the Kebab Shop, I have demonstrated strong leadership and management skills, directly contributing to the creation of hundreds of employment opportunities. This experience has honed my ability to manage effectively, foster team collaboration, and drive sustainable growth—skills that are directly transferable to the challenges and responsibilities of serving on the Affordable Housing Finance Committee. My hands-on experience in the real estate sector, combined with my entrepreneurial success and commitment to community enrichment through job creation, uniquely positions me to offer a comprehensive perspective on affordable housing finance and development. I am deeply motivated to leverage my expertise and experiences to contribute to the committee's mission of expanding access to affordable housing, and I am confident in my ability to make a meaningful impact in this role.

**Would you like to be considered for appointment to other advisory bodies for which you may be qualified?**

Yes  No

**Do you have any obligations that might affect your attendance at scheduled meetings?**

Yes  No

**If Yes, please explain:**

I am the proud father of two daughters who are currently in Kindergarten and an infant in Kindergarten, and my wife plays a critical role at Stanford Hospital. Given the nature of her work, there are occasions when she may be on call, requiring me to take on primary childcare responsibilities. While I am deeply committed to fulfilling my duties and contributing my best to the board, these circumstances could potentially impact my availability for meetings or events at times. I want to be upfront about this possibility and assure you that I will proactively manage my commitments to minimize any disruption. My family and I are dedicated to finding balanced solutions that enable me to serve effectively on the board while attending to my parental responsibilities. I appreciate your understanding and flexibility in this matter.

**Are you currently or have you ever been appointed to a Contra Costa County advisory board?**

Yes  No

**If Yes, please list the Contra Costa County advisory board(s) on which you are currently serving:**

**If Yes, please also list the Contra Costa County advisory board(s) on which you have previously served:**

**List any volunteer or community experience, including any advisory boards on which you have served**

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## **Conflict of Interest and Certification**

**Do you have a familial or financial relationship with a member of the Board of Supervisors? (Please refer to the relationships listed under the "Important Information" section below or Resolution No. 2021/234)**

Yes  No

**If Yes, please identify the nature of the relationship**

**Do you have any financial relationships with the County such as grants, contracts, or other economic relationships?**

Yes  No

**If Yes, please identify the nature of the relationship:**

**Please Agree with the Following Statement**

**I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publicly accessible. I understand that misstatements and/or omissions of material fact may cause forfeiture of my rights to serve on a board, committee, or commission in Contra Costa County.**

I Agree

Important Information

1. This application and any attachments you provide to it is a public document and is subject to the California Public Records Act (CA Government Code §6250-6270).
2. All members of appointed bodies are required to take the advisory body training provided by Contra Costa County.
3. Members of certain boards, commissions, and committees may be required to: (1) file a Statement of Economic Interest Form also known as a Form 700, and (2) complete the State Ethics Training Course as required by AB 1234.
4. Meetings may be held in various locations and some locations may not be accessible by public transportation.
5. Meeting dates and times are subject to change and may occur up to two (2) days per month.
6. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.
7. As indicated in Board Resolution 2021/234, a person will not be eligible for appointment if he/she is related to a Board of Supervisors' member in any of the following relationships:
  - (1) Mother, father, son, and daughter;
  - (2) Brother, sister, grandmother, grandfather, grandson, and granddaughter;
  - (3) Husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, stepson, and stepdaughter
  - (4) Registered domestic partner, pursuant to California Family Code section 297;
  - (5) The relatives, as defined in 1 and 2 above, for a registered domestic partner;
  - (6) Any person with whom a Board Member shares a financial interest as defined in the Political Reform Act (Gov't Code §87103, Financial Interest), such as a business partner or business associate

# Application Form

## Profile

Da as \_\_\_\_\_ E ott \_\_\_\_\_  
First Name Middle Initial Last Name

Home Address \_\_\_\_\_ Suite or Apt \_\_\_\_\_  
 Walnut Creek CA 94595  
City State Postal Code

Mobile: \_\_\_\_\_  
Primary Phone

\_\_\_\_\_  
email Address

## [District Locator Tool](#)

### Resident of Supervisorial District:

District 4

Currently Unemployed \_\_\_\_\_ Senior Finance Manager \_\_\_\_\_  
Employer Job Title

### Length of Employment

12 Years

### Do you work in Contra Costa County?

Yes  No

### If Yes, in which District do you work?

### How long have you lived or worked in Contra Costa County?

### Are you a veteran of the U.S. Armed Forces?

Yes  No

## Board and Interest

### Which Boards would you like to apply for?

Affordable Housing Finance Committee: Submitted

### Seat Name

Have you ever attended a meeting of the advisory board for which you are applying?

Yes  No

If Yes, how many meetings have you attended?

---

## Education

Select the option that applies to your high school education \*

High School Diploma

College/ University A

Name of College Attended

University of the Pacific

Degree Type / Course of Study / Major

Bachelors / Business Finance and Economics

Degree Awarded?

Yes  No

College/ University B

Name of College Attended

Degree Type / Course of Study / Major

Degree Awarded?

Yes  No

---

College/ University C

Name of College Attended

Degree Type / Course of Study / Major

Degree Awarded?

Yes  No

---

Other Trainings & Occupational Licenses



**Other Training A**

---

**Certificate Awarded for Training?**

---

Yes  No

**Other Training B**

---

**Certificate Awarded for Training?**

---

Yes  No

**Occupational Licenses Completed**

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---

**Qualifications and Volunteer Experience**

**Please explain why you would like to serve on this particular board, committee, or commission.**

---

I love my home in Walnut Creek and I love Contra Costa county. I want to be apart of the community and my financial skills and background make me well qualified for this role.

**Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application)**

---

High business acumen espec a y surround ng finance.

---

Upload a Resume

**Would you like to be considered for appointment to other advisory bodies for which you may be qualified?**

---

Yes  No

**Do you have any obligations that might affect your attendance at scheduled meetings?**

---

Yes  No

**If Yes, please explain:**

---

**Are you currently or have you ever been appointed to a Contra Costa County advisory board?**

---

Yes  No

If Yes, please list the Contra Costa County advisory board(s) on which you are currently serving:

If Yes, please also list the Contra Costa County advisory board(s) on which you have previously served

List any volunteer or community experience, including any advisory boards on which you have served.

---

### Conflict of Interest and Certification

Do you have a familial or financial relationship with a member of the Board of Supervisors? (Please refer to the relationships listed under the "Important Information" section below or Resolution No. 2021/234)

Yes  No

If Yes, please identify the nature of the relationship:

Do you have any financial relationships with the County such as grants, contracts, or other economic relationships?

Yes  No

If Yes, please identify the nature of the relationship:

Please Agree with the Following Statement

I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publicly accessible. I understand that misstatements and/or omissions of material fact may cause forfeiture of my rights to serve on a board, committee, or commission in Contra Costa County.

I Agree

---

Important Information

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4. Meeting may be held in variou location and ome location may n t be acce ible by public transportation.
5. Meeting dates and times are subject to change and may occur up to two (2) days per month.
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7. A indicated in Board Re olution 2021/234, a per on will not be eligible for appointment if he/she is related to a Board of Supervisors' member in any of the following relationships:
  - (1) Mother, father, son, and daughter;
  - (2) Brother, sister, grandmother, grandfather, grandson, and granddaughter;
  - (3) Husband, wife, father-in-law, mother-in-law, son-in-law, daughter- n-law, stepson, and tepdaughter
  - (4) Registered domestic partner, pu suant to Cali ornia Family Code section 297;
  - (5) The relatives, as defined in 1 and 2 above, for a registered domestic partner;
  - (6) Any person with whom a Board Member shares a financial interest as defined in the Political Reform Act (Gov't Code §87103, Financial Interest), such as a business partner or bu ine a ociate

## **Summary**

Experienced Finance, Data, Systems & Business Intelligence professional with strong financial, analytical, and technical skills. Unique ability to comprehend business finance objectives & architect solutions to problem-solve. Adept at converting manual processes through driving process optimization, systems automation, enhancing repeatable analysis, and improve reliability & accuracy. Expert at leveraging technology competencies to enable optimum access to system data, allow development of better systems, and facilitate rapid creation of needed reports for management's strategic decisions.

## **Skills and Competencies**

Treasury | Cash Forecasting | System Implementations | Project Management | Advanced Modeling | P&L Ownership | Advanced Excel | VBA | EC2 Instances | Python | SQL | GIT | Cronjobs | AWS | Hive | Presto | Kyriba | NetSuite | Oracle | Tableau | Domo | Marketo | Credit Underwriting | SOC 2 | ACH | Wires | Process Architecture | Controls | Reconciliations | Compliance | Banking Administration |

## **Experience**

*Sr Manager, Treasury*  
*Carta*

*Jan 2022 – May-2023*  
*(San Francisco, CA)*

- Developed automated cash allocation analysis to maximize interest income while continuing diversification of funds.
- Generated highly accurate cash forecasting models which were plug and play. Departments could alter cash burn, interest income, and revenue streams dynamically and the model automatically updates forecast. This allowed Carta to optimize interest income, diversification of funds, while maintaining liquidity for operational needs.
- Created and automated holistic reporting of all account balances, interest incomes, bank fees, and other relevant data to banking.
- Monitored compliance and performance of investments alongside investment advisors.
- Created investment policy alongside industry professionals.
- Maintained banking relationship. Including negotiations for pricing, review of legal contracts for new banking programs, and coordination of implementation of new banking programs and features.

*Sr Manager, Finance/Treasury*  
*Wisetack*

*Jun 2020 – Jan 2022*  
*(San Francisco, CA)*

- Both determine and execute strategic initiatives for the Treasury department. Decide appropriate staffing levels, recruit skilled talent, and manage teams as needed. Work with the Federal Reserve reporting systems and partner banks to optimize money flows and operating procedures. Establish reporting to implement higher level automation and construct holistic platform reconciliations.
- Design, implement and manage all treasury related operational processes in conjunction with automating them. Direct and monitor accurate cash movements, along with conducting and designing necessary reconciliations.

*Sr Manager, Treasury / Finance Data & Automation  
LendingClub*

*Jul 2015 – Oct 2019  
(San Francisco, CA)*

- Designed, automated, and documented operational workflows, reconciliation processes, and reporting within the Treasury Department. This approach removed redundant processes, mitigated risk, improved efficiency, and enhanced KPI reporting.
- Developed and designed an automatic subledger software system to optimize workflow and allow the company to perfectly reconcile daily cash exceeding 1 million transactions per day. The system automatically generated ledger entries, audit reports, and key metrics useful for management.
- Frequently created reporting and presentation decks requiring complex analysis of data sets to drive business decisions, assess risk, report on group metrics, perform audit requests, and explain workflow.

*Assistant Vice President -P&L Business Control Analyst (FX Emerging Markets)  
Bank of America Merrill Lynch*

*Dec 2012 – Apr 2015  
(New York, NY)*

- Validated and substantiated position balances for the bank's general ledger across 50+ FX portfolios daily. Face value of transactions exceeded billions of dollars per month.
- Ensured the Business Unit's financial data was accurately reflected in all the bank's systems.
- Automated daily processes with Python and VBA reducing repetitive work from hours to minutes.
- Learned large company institutional systems for managing and reconciling positions and cash
- Broke out trader P&L plex - (Delta / Gama / Theta / Vol ) on a daily basis. This process includes analysis of yield curves to determine if given P&L was correct.

*Operations tech – derivatives  
Bank of America Merrill Lynch*

*July 2010 – Dec 2012  
(Concord, CA)*

- Reviewed, confirmed, and settled institutional FX and FX derivative transactions worldwide.
- Reviewed and validated cash flows along with complex reconciliation of accounts receivable and accounts payable.
- Conducted trade matching and confirmations via swift and long form.
- Reviewed broker confirmations and Reuter conversations to ensure tickets were accurately booked.

## **Education**

University of the Pacific, Stockton, CA

*Bachelors of Science in Business Finance*

*May 2010*

*Bachelors of Science in Applied Economics*

*May 2010*

# Application Form

## Profile

Keycha \_\_\_\_\_ D \_\_\_\_\_ Ga on \_\_\_\_\_  
First Name Middle Initial Last Name

\_\_\_\_\_ Home Address \_\_\_\_\_  
Home Address State or Zip

VALLEJO \_\_\_\_\_ CA \_\_\_\_\_ 94590 \_\_\_\_\_  
City State Postal Code

Home: \_\_\_\_\_  
Primary Phone

\_\_\_\_\_ mail Address \_\_\_\_\_  
mail Address

### [District Locator Tool](#)

#### Resident of Supervisorial District:

N/A - Out of County

Keyz 2 The Future \_\_\_\_\_ Executive Director \_\_\_\_\_  
Employer Job Title

#### Length of Employment

2

#### Do you work in Contra Costa County?

Yes  No

#### If Yes, in which District do you work?

5

#### How long have you lived or worked in Contra Costa County?

I lived in contra Costa County for 35 years, I worked in contra County for 20 years

#### Are you a veteran of the U.S. Armed Forces?

Yes  No

## Board and Interest

#### Which Boards would you like to apply for?

Affordable Housing Finance Committee: Submitted

**Seat Name**

---

**Have you ever attended a meeting of the advisory board for which you are applying?**

---

Yes  No

**If Yes, how many meetings have you attended?**

---

No

---

---

## **Education**

**Select the option that applies to your high school education \***

---

High School Diploma

**College/ University A**

**Name of College Attended**

---

University of Colorado

**Degree Type / Course of Study / Major**

---

Master Business Administration

**Degree Awarded?**

---

Yes  No

**College/ University B**

**Name of College Attended**

---

University of Colorado

**Degree Type / Course of Study / Major**

---

Bachelor's of Business Administration

**Degree Awarded?**

---

Yes  No

---

**College/ University C**

**Name of College Attended**

---

Contra Costa College

**Degree Type / Course of Study / Major**

Associate Art Sociology

**Degree Awarded?**

Yes  No

**Other Trainings & Occupational Licenses**

**Other Training A**

Life Coach

**Certificate Awarded for Training?**

Yes  No

**Other Training B**

Certified Pharmacy Technician

**Certificate Awarded for Training?**

Yes  No

**Occupational Licenses Completed:**

Certified Pharmacy Technician

**Qualifications and Volunteer Experience**

**Please explain why you would like to serve on this particular board, committee, or commission.**

I am interested in serving on the Affordable Housing Finance Committee because I believe in the importance of providing access to housing options for individuals and families. Additionally, I'm passionate about addressing homelessness in our community, which is why I'm drawn to the Contra Costa Council on Homelessness. As for the Contra Costa Community Corrections Partnership, I believe in the rehabilitation and support of individuals within the criminal justice system. Last year, with First 5 - Contra Costa Children and Families, I am dedicated to ensuring that our youngest children have the resources and support they need to thrive.

**Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application)**

Resume Attached

Upload a Resume



**Would you like to be considered for appointment to other advisory bodies for which you may be qualified?**

Yes  No

**Do you have any obligations that might affect your attendance at scheduled meetings?**

Yes  No

**If Yes, please explain:**

Na

**Are you currently or have you ever been appointed to a Contra Costa County advisory board?**

Yes  No

**If Yes, please list the Contra Costa County advisory board(s) on which you are currently serving:**

Na

**If Yes, please also list the Contra Costa County advisory board(s) on which you have previously served:**

Na

**List any volunteer or community experience, including any advisory boards on which you have served**

Founder & Executive Director | Keyz 2 The Future Vallejo, CA September 2022 – Present Led the comprehensive operations of the non-profit, organizing community events, and acted as a project coordinator, overseeing management tasks, weekly activities, accounting tasks, collecting grants and donors, and coordinating the best resources for families. Sought out grants and drafted proposals for funding. Local Lead | Moms Demand Act on Richmond/ Vallejo, CA September 2021 – Present Lead the charge in growing the local group, emphasizing the importance of equity and inclusion. Using the honed skills in Diversity, Equity, and Inclusion (DEI) from Moms Demand Act on trainings, Proactively plan and enable the local leadership team to step into organization to achieve the objective to nurture a diverse movement that champions and respects individuals from all backgrounds, with a specific focus on amplifying communities disproportionately impacted by gun violence. Project Manager | Motivated 2 Help Others, Richmond, CA September 2018 – Present Headed the overall operations of the non-profit planning community events and functioned as a project coordinator, managing numerous weekly activities, accounting tasks, collecting grant and donors, and coordinating the best resources for families. Oversaw a team of employees, performed staff attendance reviews, and conducted discipline meetings as needed. Renowned for becoming a highly reliable expert in union contracts and instituted game-changing members on rebuilding communities. Co-Lead for Attendance/Total Health/Unit Base Team | Labor, Oakland, CA December 2015 – Present Steward | Local 29 Shop, Oakland, CA April 2007 – January 2020

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### **Conflict of Interest and Certification**

**Do you have a familial or financial relationship with a member of the Board of Supervisors?  
(Please refer to the relationships listed under the "Important Information" section below or  
Resolution No. 2021/234)**

---

Yes  No

**If Yes, please identify the nature of the relationship:**

---

Na

**Do you have any financial relationships with the County such as grants, contracts, or other  
economic relationships?**

---

Yes  No

**If Yes, please identify the nature of the relationship:**

---

Na

**Please Agree with the Following Statement**

---

**I CERTIFY that the statements made by me in this application are true, complete, and correct  
to the best of my knowledge and belief, and are made in good faith I acknowledge and  
undersand that all information in this application is publicly accessible. I understand that  
misstatements and/or omissions of material fact may cause forfeiture of my rights to serve  
on a board, committee, or commission in Contra Costa County.**

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I Agree

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  - (2) Brother, sister, grandmother, grandfather, grandson, and granddaughter;
  - (3) Husband, wife, father-in-law, mother-in-law, son-in-law, daughter- n-law, stepson, and tepdaughter
  - (4) Registered domestic partner, pu suant to Cali ornia Family Code section 297;
  - (5) The relatives, as defined in 1 and 2 above, for a registered domestic partner;
  - (6) Any person with whom a Board Member shares a financial interest as defined in the Political Reform Act (Gov't Code §87103, Financial Interest), such as a business partner or bu ine a ociate

# Keycha D Neff Gallon

🏠 Vallejo, CA 94590 📞



## Administrative Service Manager

Dynamic and accomplished professional with 7+ years of experience and diverse background in project management, training facilitation, strategic planning, bookkeeping, and inventory control. An upcoming human resource leader capable of carrying out viable leads using innovative methodologies to a full spectrum of human resources. Equipped with a proven track record of systematically aligning objectives with shifting paradigms to achieve maximum impact with minimum resource expenditures. Adept tactician towards HR-related initiatives and proficient in managing departmental training and development programs, implementing corrective actions plans, and revitalizing existing business resources to achieve operational and organizational goals. Collaborative across business lines, fostering teamwork, employee loyalty, compliance to labor laws, far-seeing strategies in a metrics-driven environment, and operational excellence through productivity.

### CAREER HIGHLIGHTS

- ✓ Co-founded the "Motivate 2 Help Others," a non-profit plan community events and served as a project coordinator, managing the overall operations of weekly activities, accounting tasks, soliciting grants and donors, and coordinating the best resources for families.
- ✓ Led a team of employees, performed staff attendance reviews, and conducted discipline meetings as needed.
- ✓ Collaborated with 20+ multi-disciplinary team members to strategize on bolstering client retention and satisfaction on service delivery.
- ✓ Developed mastery and expertise in union contracts and immersed in the rebid communities.
- ✓ Delivered effective call center management and inbound call strategies to respond to multiple customer issues, eliminating issue escalation and increasing customer loyalty that eventually amplified revenue growth and new business opportunities.
- ✓ Spearheaded the implementation of quarterly training and development programs that improved productivity and efficiency by 60%.
- ✓ Authored customer service metrics to monitor, analyze and maintain patient-focused and cost-effective health service delivery.

### CORE COMPETENCIES

Strategic Leadership | Human Resource Management | HR Professional Services | HR Business Strategy | Compensation & Business Scheme Alignment | Payroll Administration & Management | Employee Training & Performance Management | Employee Engagement & Retention | Employee Policies | Labor Laws & Government-Mandated Regulations | Organizational Regulations and Compliance | Excellent Communication Skills | Effective Job Market Prospecting | Candidate Screening | Employee Hiring & Onboarding | Cross-Functional Teamwork | People Management | Problem-Solving | Analytical Thinking | Strategic Thinking | Attention to Detail | Excellent Communication & Collaboration | Cultural Awareness & Sensitivity | Strong Work Ethic | Good Decision-Making | Monitoring & Evaluation | Interpersonal & Collaboration | Critical Thinking | Detail Oriented | Flexibility & Adaptability | Time Management | Team Building

### PROFESSIONAL WORK EXPERIENCE

Pharmacy Technician & Stocking to Standard Technician | *Kaiser Permanente, Oakland, CA*  
2003 – Present

February

- ✓ Advise prescribed medication to 150+ patients daily by verifying the eligibility of prescription orders, aligning with the physician's instructions, and eliminating drug mismatch errors to administer correct and proper medication.
- ✓ Work closely with 20+ multi-disciplinary team members to strategize in bolstering client retention and satisfaction on service delivery.
- ✓ Instrumental in improving productivity and efficiency by 60% through the effective conceptualization and implementation of quarterly training and development programs that aim to enhance employees' job capabilities, skillset, and industry knowledge.

- ✓ Train 8+ new hires on the organization’s mission, values, working conditions, and regulations, ensuring a smooth onboarding process.
- ✓ Leverage CRM capabilities to retain, develop and acquire new and existing customers.
- ✓ Champion prompt resolution and service in addressing clients’ inquiries with respect, integrity, and professionalism.
- ✓ Guarantee the timely processing and delivery of high-volume client orders daily.
- ✓ Direct the tracking and monitoring of received orders, ensuring repeat business from new and existing clients.
- ✓ Capitalize on effective call center management and inbound call strategies to respond to multiple customer issues, eliminating issue escalation and increasing customer loyalty that eventually amplifies revenue growth and new business opportunities.

### PROFESSIONAL WORK EXPERIENCE (continuation)

- ✓ Execute the implementation of customer service metrics to monitor, analyze and maintain patient-focused and cost-effective health service delivery, to improve the health facility’s brand awareness, and to acquire potential leads.
- ✓ Engage in multiple job briefings daily to align objectives with business goals, exchange ideas, and keep informed with relevant information.
- ✓ Direct multiple delivery and dispatch of drug consignments to clients daily, including loading packages and liaising with the dispatch team to ensure timely delivery, improving customer satisfaction, and driving client retention.
- ✓ Initiated the establishment and deployment of multiple purchase requisitions to inform departmental managers of the resources required, eliminating instances of fraud and accelerating the purchasing process to impact operational efficiency.

### EDUCATION

#### Bachelor’s Degree in Business Management

CTU, Colorado Springs, CO | 2021

#### Associate Arts Degree in Sociology

Costa College, San Pablo, CA | 2014

### CERTIFICATIONS

American Red Cross Basic Life Saving, Pinole, California | 2021

### VOLUNTEER EXPERIENCE

**Co-founder & Project Manager | *Motivated 2 Help Others*, Richmond, CA** **September**  
2018 – Present

- ✓ Headed the overall operations of the non-profit plan community events and functioned as a project coordinator, managing numerous weekly activities, accounting tasks, soliciting grants and donors, and coordinating the best resources for families.
- ✓ Oversaw a team of employees, performed staff attendance reviews, and conducted discipline meetings as needed.
- ✓ Renowned for becoming a highly reliable expert in union contracts and instituted game-changing immersion on rebid communities.

**Co-Lead for Attendance/Total Health/Unit Base Team | *Labor*, Oakland, CA** **December**  
2015 – Present

**Steward | *Local 29 Shop*, Oakland, CA** **April 2007**  
– January 2020

**Cheer Coach | *West County Spartans Association*, Pinole, CA** **May 2006 –**  
January 2014

**Baseball Coach | *San Pablo Baseball Association*, San Pablo, CA** **April 2003**  
– August 2011

### TECHNICAL SKILLS

Quickbooks | Microsoft Office Suite (Word & Excel)

# Application Form

## Profile

Jane e

First Name

T

Middle Initial

Lafrades

Last Name

[Redacted] Home Address

State or Zip

Pittsburg

City

CA

State

94565

Postal Code

Home:

Primary Phone

[Redacted] Email Address

## [District Locator Tool](#)

Resident of Supervisorial District:

None Selected

Employer Job Title

## Length of Employment

Do you work in Contra Costa County?

Yes  No

If Yes, in which District do you work?

How long have you lived or worked in Contra Costa County?

Are you a veteran of the U.S. Armed Forces?

Yes  No

## Board and Interest

Which Boards would you like to apply for?

Affordable Housing Finance Committee: Submitted

Seat Name

Have you ever attended a meeting of the advisory board for which you are applying?

Yes  No

If Yes, how many meetings have you attended?

Policy Council meeting, if that counts. If not then, no I have not.

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## Education

Select the option that applies to your high school education \*

High School Diploma

College/ University A

Name of College Attended

Norfolk State University

Degree Type / Course of Study / Major

Political Science-Pre-Law

Degree Awarded?

Yes  No

College/ University B

Name of College Attended

Degree Type / Course of Study / Major

Degree Awarded?

Yes  No

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College/ University C

Name of College Attended

Degree Type / Course of Study / Major

Degree Awarded?

Yes  No

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Other Trainings & Occupational Licenses

### Other Training A

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Para ega Certificate

**Certificate Awarded for Training?**

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Yes  No

### Other Training B

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Marketing

**Certificate Awarded for Training?**

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Yes  No

**Occupational Licenses Completed:**

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## Qualifications and Volunteer Experience

**Please explain why you would like to serve on this particular board, committee, or commission**

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I would love to serve on this particular board because I volunteer now with my daughters school and I am one of the policy council members now. I enjoy serving my community and helping out with the youth. I also know that if one wants to help make a difference or be a part of any change, you have to be involved and that is why I want to be of service and serve!

**Describe your qualifications for this appointment. (NOTE: you may also include a copy of your resume with this application)**

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I was a part of the policy council when my son attended Head Start and 3 years after he left the school as well. I have worked with the youth at my wife, rather than with the boys and girls club, the youth center in Norfolk VA or any other school or center that have needed help. I have been a teacher on 4 different boards along with Vice President and President. Giving back and being a servant is definitely my motto!

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Upload a Resume

**Would you like to be considered for appointment to other advisory bodies for which you may be qualified?**

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Yes  No

**Do you have any obligations that might affect your attendance at scheduled meetings?**

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Yes  No



**If Yes, please explain:**

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I have two people that if at any time may need my services. If something were to come up, I would have to depend on the meeting of one of them if they could help out I would have the idea that I am 90% of the time, if not always present, so there should not be any issues. I would also get someone to know way beforehand if an emergency came about during meeting time.

**Are you currently or have you ever been appointed to a Contra Costa County advisory board?**

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Yes  No

**If Yes, please list the Contra Costa County advisory board(s) on which you are currently serving:**

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N/A

**If Yes, please also list the Contra Costa County advisory board(s) on which you have previously served**

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N/A

**List any volunteer or community experience, including any advisory boards on which you have served.**

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First Baptist, Head Start and the YMCA I volunteered whenever I was and as needed I also served 3 terms on the Policy Council board and was a member for about 5. With my Sorority, we volunteered with several community events and help serve at many different shelters.

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### **Conflict of Interest and Certification**

**Do you have a familial or financial relationship with a member of the Board of Supervisors? (Please refer to the relationships listed under the "Important Information" section below or Resolution No. 2021/234)**

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Yes  No

**If Yes, please identify the nature of the relationship**

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N/A

**Do you have any financial relationships with the County such as grants, contracts, or other economic relationships?**

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Yes  No

**If Yes, please identify the nature of the relationship:**

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N/A

**Please Agree with the Following Statement**

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**I CERTIFY that the statements made by me in this application are true, complete, and correct to the best of my knowledge and belief, and are made in good faith. I acknowledge and understand that all information in this application is publicly accessible. I understand that misstatements and/or omissions of material fact may cause forfeiture of my rights to serve on a board, committee, or commission in Contra Costa County.**

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I Agree

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Important Information

1. This application and any attachments you provide to it is a public document and is subject to the California Public Records Act (CA Government Code §6250-6270).
2. All members of appointed bodies are required to take the advisory body training provided by Contra Costa County.
3. Members of certain boards, commissions, and committees may be required to: (1) file a Statement of Economic Interest Form also known as a Form 700, and (2) complete the State Ethics Training Course as required by AB 1234.
4. Meetings may be held in various locations and some locations may not be accessible by public transportation.
5. Meeting dates and times are subject to change and may occur up to two (2) days per month.
6. Some boards, committees, or commissions may assign members to subcommittees or work groups which may require an additional commitment of time.
7. As indicated in Board Resolution 2021/234, a person will not be eligible for appointment if he/she is related to a Board of Supervisors' member in any of the following relationships:
  - (1) Mother, father, son, and daughter;
  - (2) Brother, sister, grandmother, grandfather, grandson, and granddaughter;
  - (3) Husband, wife, father-in-law, mother-in-law, son-in-law, daughter-in-law, stepson, and stepdaughter
  - (4) Registered domestic partner, pursuant to California Family Code section 297;
  - (5) The relatives, as defined in 1 and 2 above, for a registered domestic partner;
  - (6) Any person with whom a Board Member shares a financial interest as defined in the Political Reform Act (Gov't Code §87103, Financial Interest), such as a business partner or business associate

# Janelle T. Lafrades

## Objectives

Extremely friendly professional with proven success in general management and leadership, customer service and financial services operations seeking an opportunity in management in medium or large-scale business operations. Outstanding analytical and organizational skills, change leadership, data analysis and staff training.

## Achievement Highlights

- Consistently maintained performance in top 10% of peers in all measured areas.
- Earned Platinum Mortgage Club three consecutive quarters.
- Finished 150% of goal for four straight quarters, while meeting goals in all other quarters.
- Promoted internally from every position held.
- Finished second quarter 125% of goal #1 out of 23 Branches
- Finished 300% over goal for sales campaign in small business category
- Hit goal first start with NCSA and still growing
- Rookie of the month 2-3 of the first 90 days
- Took branch from a F grade to an A- for Audit in less than 7 months
- Two consecutive perfect branch Audits
- During COVID maintained a 90% NPS score

## Professional Groups/Associations

- President of Head Start School Board 2014-2017
- Vice President of Head Start School Board 2011-2014
- Delta Sigma Theta Sorority Inc. 2004
- Norfolk State University Softball Captain 2000-2004
- Thurgood Marshall Club Treasurer 2002-2003
- Golden Key International Honor Society 2000-Present
- Alpha Mu Honor Society 2000-Present

## Professional Experience

Company: **USE Credit Union**

Date of Employment: April 2018 to Present

- Assist the Credit Union in achieving its long term goals and objectives and provide strong leadership to fulfill the credit union's core strategy and vision. Cultivate and inspire within the branch that is in alignment with USECU's culture and values.
- Lead and guide the franchise team around instilling and maintaining 7 Habits and Creating Member Loyalty Service and Sales Strategies, Mystery Shop guidelines and

collaboration. (Better Together.)

- Serve as the primary relationship development officer and sales coach with a focus on developing and executing plans that are focused on acquiring, retaining and deepening profitable households and CAP/SEG partnerships.
- Responsible for the achievement of branch sales and service goal attainment while monitoring and adjusting performance throughout the year.
- Manage and influence the branch profitability with a particular emphasis on developing relationships and expanding the sales culture and process.
- Serve as the sales leader and sales coach for the branch, directly responsible for sales-skill development of staff, sales performance, goal achievement, member acquisition, member retention, cross-sells, upsells, and referrals, and the closing ratios of loans, and other cross-sell products.
- Facilitate branch meetings and various forms of coaching including 1:1 coaching.
- Responsible for branch business development, conducting outside calling activities, growing new and existing SEG relationships, attending community events, and promoting the public image of USE, the credit union philosophy and USE's services and products to the SEGs and the local community.
- Lead by example by personally establishing new memberships, deposits and other products and services as well as originate and fund consumer loans. Utilize the Deep Dive to meet each member's perceived and unperceived financial needs. Perform appropriate on-boarding activities for all new and existing members including follow up calls.
- Initiates proactive outbound calls including internal lists and targeted prospects.
- Collaborate with Marketing Department regarding promotions, new business and merchandising. Execute and capitalize on marketing campaigns with outbound sales activities.
- Attend business partner functions and participate in strategic community activities and events to promote Credit Union Awareness and our products and services.
- Responsible for completion and accuracy of employee incentive plan payouts.

- Maintain knowledge of the Credit Union's products, services and procedures in order to efficiently train, develop and motivate staff to cross-sell
- Hire, train, manage, coach, conducts performance reviews, counsel and discipline staff to ensure employees are proficient in all phases of their respective jobs and responsibilities, are performing to expectations, and are contributing to the branch goals and objectives; responsible for managing and reducing turnover of branch employees.

Company: **Next College Student Athlete (NCSA)**

Date of Employment: August 2017 to April 2020

### **Senior Sports Recruiting Specialist**

- Work remotely from home office and meet with families virtually via phone or video conferencing
- An athletic recruiting expert and trusted advisor
- Evaluate and qualify student-athletes academically and athletically for college coaches
- Provide realistic expectations for student-athlete and help them find the right college opportunity
- Help families find the right NCSA membership to assist with their recruiting needs
- Highlight NCSA's online tools and benefits with families
- Sell and enroll qualified student-athletes into the best-fitting premier recruiting membership
- Help make memorable experiences and dreams come true for every student-athlete and family
- Have fun and build with my team daily, very sports-oriented team culture, that has turned into family
- A very competitive sales environment that will push you but also motivates and supports you

Company: **US BANK**

Date of Employment: April 2015 to August 2017

### **Branch Manager**

- Lead weekly coaching and training for staff to increase sales and improve customer service
- Manage daily activities for staff such as scheduling and off-site sales travel

## Janelle T. Lafrades

- Responsible for total oversight of service delivery and sales production
- Ensure branch is in compliance and operationally sound
- Provide top-notch customer service and participate in achievement of branch sales goals
- Actively prospect local businesses to generate sales and customer retention
- Manage customer services scores and set weekly activities for staff to keep culture fun and outgoing
- Plan volunteer time for community service events
- Attend local community events and chamber meetings
- Notary services
- Lead credit card and leadership calls
- Coach staff weekly
- Lead weekly sales meeting
- Manage three tiers of business portfolio's (over 300 clients)
- Meet with 8-10 business clients weekly
- Complete quarterly teller audits and exposures
- Complete quarterly teller difference logs
- Interview new hires and mentor new branch manager's

Company: **Car Hop Auto Sales and Finance**

Date of Employment: March 2014 to April 2015

### **Branch Manager**

- Negotiate car selection, terms, and down payment with customers as needed
- Solicit outside referral sources at other dealerships
- Coach, mentor, motivate, and train consultative Sales team
- Teach phone etiquette and marketing techniques to Sales team
- Monitor branch productivity to meet goals
- Monitor selling/marketing efforts, and results, on a weekly basis
- Review scheduling and punctuality, as well as schedule compliance
- Review training progress of new hires
- Monitor and help develop each sales person's individual action plans
- Plan for weekly manager's meetings and conference calls
- Resolve customer complaints and deposit issues as needed
- Resolve insurance claims and help customers get set up with rental cars
- Complete performance appraisals for direct reports
- Responsible for inventory and making sure vehicles get properly registered
- Actively participate in recruiting activity

Company: **US BANK**

Date of Employment: November 2011 to April 2014



**Branch Manager (Promoted from Assistant Manager) In-Store**

- Lead weekly coaching and training for staff to increase sales and improve customer service
- Manage daily activities for staff such as scheduling and off-site sales travel
- Responsible for total oversight of service delivery and sales production
- Ensure branch is in compliance and operationally sound
- Provide top-notch customer service and participate in achievement of branch sales goals
- Actively prospect local businesses to generate sales and customer retention
- Lead five sales calls per day for entire market

Company: **Bank of America**

Date of Employment: June 2004 to October 2011

**Senior Personal Banking Manager (Promoted from Teller, Personal Banker)**

- Motivated a team of six to succeed in daily sales goals. Always inspired staff to reach beyond sales goals.
- Actively recruited new team members.
- Proven loyalty and ability to progress as exhibited by two promotions (Teller to Personal Banker, Personal Banker to Manager)
- Maximized the depth and profitability of the customer's relationship with the company by leveraging partnerships with specialists, contributing to the success of the firm and creating an outstanding customer experience.
- Interacted daily with customers to provide needs-based financial solutions
- Exhibited proficiency in MS Office applications by leveraging reporting and projection tools with customers
- Efficiently processed applications for home mortgages/refinances and HELOCs, in addition to retaining customers in danger of foreclosing or refinancing with other companies.
- Concurrently worked as a Finance Processor for Towne Automotive Group. Prepared loan applications for automobile purchases - approximately 20 per week. Also prepared loan specific sales contracts for processing with the DMV and insurance companies.

**Professional Education**

Life and Health Agent Pre-Licensing Certificate, 2011

Certified Paralegal, 2003

**Academic Education**

Dates of Attendance :  To

Norfolk State University, Norfolk, VA

BA, Political Science/Pre-Law, Magna Cum Laude

Janelle

## References

Available upon request