

City of Costa Mesa
Application for Committee/Board Appointment

All information on this page only, is considered public information and will be released to the public, including being posted on the City's website.



City of Costa Mesa
77 Fair Drive, Costa Mesa, CA 92626

Name: James H. Bridges

Indicate the name of the Committee/Board you are interested in serving on:
Pension Oversight Committee

1. Indicate why you wish to serve on this Committee/Board. Provide any experience or qualifications you may possess that you think would be beneficial to this Committee/Board. A resume (optional) may be attached. (Note: All information contained on the resume is public information, will be distributed to the public and posted on the City's website).

As co-founding member of CBI (Citizens' Bureau of Investigation) was instrumental in the investigation leading to the State of California to make the determination, the city of Huntington Beach and their employees acted illegally to increase their already drastically bloated pensions, over 20 years ago.

Being active in my Costa Mesa community, I continue to serve, uncompensated, to strive for perpetual improvement. I plan to contribute my background in the quest for mutual resolve of the Costa Mesa pension crisis.

If desired, I feel confident chairing this committee.

James H. Bridges 2013

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Name: Sam Clark

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Pension Oversight Committee



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First, I am in full agreement with the Council that there is a need for additional oversight of Pensions and Benefits. My background in finance will allow me to work on the various and sometimes complicated pensions. I am currently the Senior Financial Systems Analyst for Billabong-USA. I have previously served as Controller for two other companies. My 6 years of service on the Planning Commission, two as Vice Chair, give me the experience working with City Staff. I bring a balanced approach to every effort I make, as my record will show. I look forward to another opportunity to serve the Citizens of Costa Mesa.

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Teresa Drain

Name: _____

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I would like to serve on the Pension Oversight Committee as part of my civic duty. My interest in the Pension Oversight Committee in particular is because I intend on living in Costa Mesa for the rest of my life, and these costs are MY cost of living.

I grew up in Los Angeles County. After careful consideration, I chose to move to Orange County, specifically Costa Mesa, in 1987. Costa Mesa's physical attributes, in conjunction with its community services, make it truly the best city in Orange County. My husband and I purchased our Costa Mesa home in 1998.

My career was in the private sector, as well as my husband's. We had a retail business in Orange County, and are quite familiar with the taxes and their bases. As private sector citizens, our retirement is based 100% on our earned income. In addition, I have personally researched and provided for my own PPO healthcare for over 20 years.

That being said, my familiarity with pensions is brief. I have one parent whose career was spent with the Los Angeles County; and is retired. My other parent was a self-made business person and is currently working in the private sector.

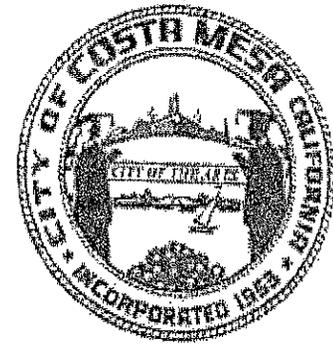
I am very interested in the Pension Oversight Committee. I believe my personal experience in retirement planning, as well as my vested interest as a homeowner, are my best qualifications.

I would find it a great honor to further serve my community. Thank you for your consideration.

2. Contact Information:

City of Costa Mesa
Application for Commission/Committee Appointment

Name: Donald Harper
Street: _____
City: _____
Phone: _____
E-mail: _____



City of Costa Mesa
77 Fair Drive, Costa Mesa, CA 92626

Indicate the name of the Commission/Committee/Board you are interested in serving on:
Pension Oversight Committee

1. Indicate why you wish to serve on this Commission/Committee/Board:

I am interesting in contributing my knowledge and expertise to the city were I live and plan to retire. I have listed my qualifications below and am willing to contribute in making Costa Mesa a great place to live.

I have 30 years of business experience, worked in both middle management and executive management; directed strategic planning; led merger and acquisition activities, founded two companies; managed "turn around" situations as a CFO; served on multiple boards; and reported to public company boards as both a business manager and financial officer. I am currently employed as an executive at IPC (USA), Inc.

I earned my Bachelors of Science in Business Administration from California State University, Chico and my CPA certificate while working with KPMG.

Key Business Experience

- Co-founder and Executive for IPC (USA), Inc.
- Chief Financial Officer and Director of Strategic Planning at SC Fuels
- Vice President Sunrise Bancorp
- CPA KPMG

Board Experience

- Director and Owner, Vista Energy Transport
- President, Saint Joachim Elementary School Board
- City of Orange Development Board

Youth Sports Volunteer Service

- St John the Baptist Basketball Coach
- National Junior Basketball Coach
- Daily Pilot Cup Soccer Coach
- Costa Mesa Boys and Girls Club Basketball Coach
- AYSO Soccer Coach

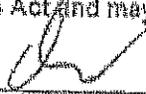
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2. Indicate any experience or qualifications you possess that might apply to the Commission/Committee/Board you are interested in serving on. A resume may also be attached to this form. This is strictly optional.

More specific qualification include four years with KPMG as a CPA and twelve years as CFO for SC Fuels. I have a very strong financial and budgeting background that should be helpful on this committee.

"Please note that this document and information included therein becomes public information pursuant to the California Public Records Act and may be disclosed to the public upon request."

Signature: _____



Date: _____

3/27/13

**City of Costa Mesa
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Name: Howard L. Hull

Indicate the name of the Committee/Board you are interested in serving on:
Pension Oversight



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I have been a registered representative with FINRA for over 15 years in the institutional investment side of the industry. I believe that I can bring a view of the challenges that both sides are currently facing going forward. Within the industry, the benefits to maintain a high standard of employee for the city, as well as realistic compensation, back by actuarial numbers to sustain the funding going forward.

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Name: Jay Humphrey

Indicate the name of the Committee/Board you are interested in serving on:
Pension Oversight Committee



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I wish to serve on this Committee because I believe that the recommendations of this committee will have a significant effect on the health of our city. I have always demonstrated the ability to clearly see all sides of an issue. The options this committee will provide to the council must be balanced to afford the best outcomes for the operations of our city.

My background/Skill set

1. Government experience: I Served on Costa Mesa City Council from 1990 to 1994 and was elected Vice Mayor (Mayor Pro Tem) from 1992 to 1994. This provides me with a wealth of information about the inner workings of City Government.

2. Board member Costa Mesa Senior Center Board 1992 to 1995

3. Business experience: Ranged from Sales to Director of Director of Distribution for a pharmaceutical firm over a 38 year period. My duties included:

(a.) Contract negotiations with US and Foreign Companies for the development, manufacture and distribution of pharmaceutical products.

(b.) Negotiations with US and Foreign Government agencies and organizations re utilization, manufacture and distribution of pharmaceutical products.

(c.) Development of financial analysis in support of (a) and (b) above

(d.) Development and implementation of Sales and expense plans for multiple levels of Sales

Management

(e.) Supervision of multiple employees (max 16), up to and including, hiring, termination, bonus and pay administration.

(f.) Employee training

(g.) Station Director, System Asst. Director of Personnel, for a unionized trucking firm in Los Angeles.

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Name: Gerald Lester

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I would appreciate your consideration of my request to serve on the Pension Oversight Committee. Costa Mesa does not have a unique situation with retirement funding. This is a national issue that is threatening the solvency of many municipalities. I feel I can bring an understanding of how a business makes financial decisions and long term liabilities of how resources are allocated

- I have lived in Costa Mesa area since 1957
- I formed an international consulting Corporation, Erudite International Inc., seven years ago with a major client in Taiwan
- As my resume depicts, I have held various management positions where I had budget control of multi-departments for labor, material and capital expenditures.
- Board of director's Padrinos philanthropic men's organization benefiting Children Hospital Orange County 1985-1995
- Active Member of American Legion Post 291 in Newport Beach
- Help organize and facilitate Balboa Island Art Walk since 2005
- Founding father of Balboa Basin Yacht Club and represent BBYC in financial matters with The City of Newport Beach
- Counselor, Junior Achievement 1973-74
- Military service 1967-1969 (Vietnam era)

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GERALD LESTER

PROFESSIONAL SUMMARY

Talented professional project manager focused on process improvement and on-time project delivery. Have extensive background in mechanical engineering, specializing in overseeing product introduction through manufacturing.

SKILLS

Project Management
Product Development
Design Review

Complex Problem Solving
Critical and Creative Thinking
Quality Assurance

WORK HISTORY

06/2005 to **Managing Engineering Technical Consultant**

Current **Erudite International Inc.** – Costa Mesa, California

Under contract to represent AeroVision Avionics Inc (AAI) in Taiwan (Republic of China) as primary engineering project manager and technical liaison to industry leading U.S. and international in-flight entertainment (IFE). Liaison with IFE integrators such as Panasonic Avionics Corporation, Thales Group, and Rockwell Collins. Provide key role in coordinating efforts of AAI to Airbus and Boeing from customer specifications to deliverable hardware for in-seat and overhead audio-visual systems. Responsible for overseeing design issues for IFE include system safety, cost efficiency, hardware maintenance, user compatibility, and FAA compliance.

09/2002 to **Project Engineer**

05/2005 **Thales Avionics, Inc.** – Irvine, CA

Spearheaded development and production of IFE hardware. Directed development of a retractable LCD monitor for passenger viewing. Granted a utility patent for this unit. Supervised all phases of design and production including planning, budgeting, vendor selection, and quality assurance. Key player in this new product introduction to the IFE industry which has been in production for eight years and is still being produced. For Thales this meant increased profitability and an expanded product line.

05/1998 to **Project Engineer**

08/2002 **Rockwell Collins** – Pomona, CA

Influenced initial development of various new IFE products from marketing input and customer requirements. Defined clear targets and objectives and communicated them to other team members. Monitored timelines and flagged potential issues to be addressed. Coordinated design meetings and decisions between four engineers, test groups, quality assurance, and the compliance/certification group. Ensured smooth transition from design to production. Value engineered as required for increased profitability.

03/1983 to **Group Leader New Product Introduction**

04/1998 **Sony Trans Com Inc.** – Irvine, CA

As Group Leader, managed and directed concurrent engineering teams that successfully introduced several multiphase audio and video systems for the standard body Airbus and Boeing aircraft. Oversaw scheduling, milestone tracking, and budget control. Supervised customer and upper management program reviews. Served as technical liaison with customers and vendors. As Section Manager coordinated manufacturing engineering tasks, quality assurance, and facilities management.

05/1979 to **Manufacturing Engineering Manager**

03/1983 **Gulton Industries Inc.** – Costa Mesa, CA

Provided budget control, capital equipment justifications, procurement processes, and product standards for the development and manufacturing of transducers. Responsible for in-process and final testing design responsibilities, tooling design, and make/buy decisions.

11/1971 to **Manufacturing Project Administrator**

05/1979 **Rockwell International Collins Radio Group** – Newport Beach, CA

Administered program budget control and program milestones for advanced communication equipment design and manufacturing. Served as interdepartmental director and program/customer liaison. Established financial forecasts. Coordinated customer requirements with manufacturing capabilities.

EDUCATION

Bachelor of Science: Industrial Technology Electronics
California State University, Long Beach - Long Beach, CA

PATENTS

Awarded nine U.S. and three international patents for passenger entertainment systems on standard body aircraft.

ASSOCIATIONS

Vice President, Board of Directors - Padrinos, Children's Hospital of Orange County - Emeritus.
Vice Commodore, Balboa Basin Yacht Club - Emeritus.

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Name: Charles Mooney



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I have lived in Costa Mesa for 35 years, however, only in the last 2 -3 years have I become active in city governance issues. I am a member of Costa Mesans for Responsible Government.

The city council has indicated that the underfunded pension obligation is a very serious problem but has not been able to address the problem.

I believe that I can offer an objective, structured, analytical, but fair and creative approach to solving this problem.

I do not receive any benefits from CalPERS.

I have:

30+ years of business experience, half of which has been at the executive level, conducting research and development of medical devices.

Negotiated several complex company to company and company to individual contracts and licensing agreements.

Advanced degrees in science and business management.

An interest in solving complex problems that will help the city of Costa Mesa and possibly others.

Read some of Joe Nation's reports on pension issues.

A basic understanding of accounting and finance, but make no claims of being an expert in either field.

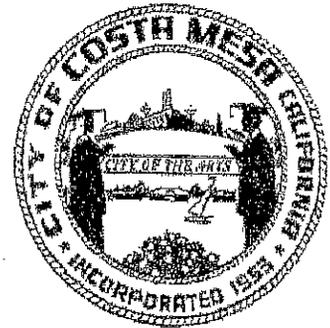
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Name: Richard A Riva, Sr.

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Serving on Costa Mesa's Pension Oversight Committee would allow me to extend my commitment to serving my community beyond my present volunteer work with the County of Orange, and other local charitable organizations.

This unique opportunity allows me to directly utilize my 20 plus years of professional investment experience in a volunteer capacity to assist the City with its' long term pension and financial obligations for the community I have lived in for over 25 years.

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Ronald Robertson

Name: _____

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I have been a resident of Costa Mesa for 35 years and for some time I have considered entering local public service in some fashion.

Yesterday I saw an article in the Daily Pilot indicating a need for committee members on the Pension Oversight Committee. In light of the extensive discussions related to public employee pensions and how they affect municipalities, counties and the state, it seems appropriate to consider using my experience to help protect both the employees and the residents of Costa Mesa.

Educational Background:

Bachelors in Business Administration - Loyola Marymount University, 1974
Masters in Business Administration - University of Southern California, 1977

Professional Background:

Grating Pacific, Inc. 1974 - present
www.gratingpacific.com
Steel service center founded and owned by our family since 1971.
Current position: President (since 1990)

Duties include:

- * General and financial management of home office and 4 branch locations (approx. 85 employees)
- * Management of employee benefit plans (including profit sharing/retirement plan)
- * Investment management of 401(k) funds
- * Strategic planning

Family Background:

Married to wife Connie Robertson, 34 years
Three adult children, all graduates of St. John the Baptist School, Mater Dei High School and various universities.

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Name: Thomas J. Lightvoet

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I have 40 years of experience working with pension plans as an investment consultant and a number of years working with Mercer Investment Consulting as a consultant to public sector pension plans. Before the City of Costa Mesa Safety Employees' Pension Plan was moved into the CalPERS system I was the investment consultant to the plan so I have a historical perspective specifically related to Costa Mesa.

While with Mercer I also headed up the Asset/Liability projects that were delivered to public sector clients like Sacramento County ERS, San Jose Safety Employees etc. I produced the first annual Mercer Public Sector Survey which was a national project that was delivered at the State Association of California Retirement Systems in 2010.

I also served as a trustee of the Orange County Employees' Retirement System for 20 years and was Chair of the Investment Committee for 17 years. As trustees we dealt with actuarial and investment related issues working with investment consultants, actuaries and investment management firms.

It is my pleasure to offer my services as a Pension Oversight Committee member.



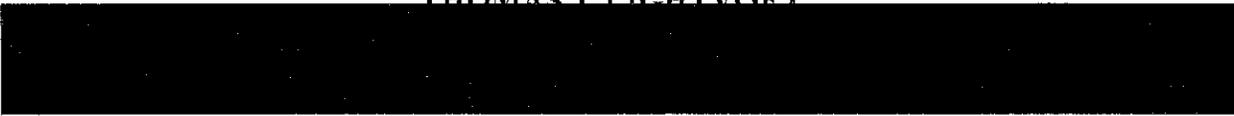
Tom Lightvoet

Tom served as a partner and senior investment consultant for the Los Angeles office of Mercer Investment Consulting, Inc for 18 years. He provided full consulting services including investment policy review, asset-liability modeling, portfolio structuring, and manager searches for public sector and corporate clients across the United States. He also managed numerous plan transition projects for Department of Energy and Department of Defense contractors throughout the United States.

Tom has more than 35 years of investment consulting experience. Prior to joining Mercer he managed the investment department of a Southern California trust company where he established a consulting department. He later spun off the consulting division which he owned and operated as a regional consulting firm for several years.

For 20 years Tom served as a trustee for the Orange County Employees' Retirement System and chaired the Investment Committee for 16 years. He has been a speaker at numerous conferences, including Guns & Hoses and several State Association of County Retirement Systems (SACRS) conferences.

THOMAS J. LIGHTVOET



CITY OF COSTA MESA PENSION OVERSIGHT COMMITTEE

Proven success working with city, county and state employees' retirement associations as an investment consultant and trustee. Specific competencies include:

• Orange County ERS Board Trustee	• OCERS' Investment Committee Chair
• CM Investment Oversight Committee	• Resource to several public sector CEOs
• Asset/Liability expertise	• Conference Speaker

EXPERIENCE

MERCER INVESTMENT CONSULTING, INC. New York, NY **1994 to 2011**

Partner, Los Angeles, CA

Served as Senior Consultant to Public, Academic and Corporate Defined Benefit/Defined Contribution Plans. Mercer's primary transition consultant on multiple Department of Energy (DOE) nuclear facilities. Managed and mentored analysts and consultants in the LA office.

- Expanded Mercer's public market exposure by developing and producing Mercer's first Annual Public Sector Survey
- Drove revenue growth by developing relationships with California county retirement systems
- Enhanced clients' decision making processes with innovative investment and governance policies
- Consistently maintained long-term client relationships
- Transition consulting with DOE resulted in 10 long-term retention relationships
- Managed and mentored analysts and consultants in the LA office
- Lead consultant on 25+ Asset/Liability Modeling projects
- Active member of Mercer's US Manager Research Committee for more than 10 years
- Public Speaking at numerous pension conferences

PACIFIC PENSION ADVISORS Newport Beach, CA **1989 to 1994**

Owner, Newport Beach, CA

Responsible for every business activity including investment manager research, conducting investment manager searches, drafting investment and governance policies and marketing to middle market prospects.

- Acquired the United Security Investment Consulting Division
- Expanded client relationships to include public plans
- Merged Pacific Pension Advisors with Mercer Investment Consulting in 1994

Thomas J. Lightvoet

UNITED SECURITY TRUST COMPANY Santa Barbara, CA

1984 to 1989

Chief Investment Officer, Newport Beach, CA

Maintained the investment manager research database and presented the CEO with opportunities for collective trust funds to be managed by external managers. Developed and marketed a consulting services division for the trust company.

- Responsible for generating \$4 million in fee revenue through the development of collective trusts
- Generated \$2 million in revenues from the Investment Consulting Division clients

PUBLIC SERVICE

ORANGE COUNTY EMPLOYEES' RET. SYSTEM Santa Ana, CA

1989 to 2008

Trustee

Responsible for 2-3 Board and sub-committee meetings per month to oversee the investment managers, interview potential managers, acting as Chairman of the Investment Committee, serving as Board Chairman, giving guidance to the staff in the administration of the System and reviewing disability applications prior to voting to approve or deny the applications.

- Served as Board Chairman during the Orange County bankruptcy
- Helped the System avoid significant losses, which could have amounted to more than \$100 million, by guiding the Board to dramatically reduce the Retirement System's investments in the County Investment Pool during my first 5 years of service
- Saved Orange County millions of dollars in contribution costs by guiding the asset allocation structure of the fund as Chairman of the Investment Committee for 17 years
- Provided long-term perspective on investment manager performance which helped the Retirement System avoid dismissing investment managers pre-maturely

PROFESSIONAL

Series 7 and 63 NASD Licenses (inactive)

PERSONAL INTERESTS

Mentoring

Tennis – Bowling Green State University, Team captain for 3 years, Athletic Hall of Fame 2005

Reading

EDUCATION

Bowling Green State University, BA, Education – Bowling Green, Ohio

Recipient of the President's Distinguished Service Award