



APPOINT BUDGET COMMITTEE MEMBERS TO FILL VACANCIES

POLICY ISSUE / SITUATION:

The Budget Committee has two vacancies:

- Zone 1 (Susan Greenberg): Fir Grove, Greenway, McKay, Montclair, Vose elementary schools, Whitford Middle School, Southridge High School and Arco Iris Charter School.
- Zone 2 (Anne Bryan): Bethany, Jacob Wismer, Oak Hills, Rock Creek, Sato elementary schools, Springville K-8 School, Stoller Middle School and Westview High School.

BACKGROUND INFORMATION:

The School Board needs to appoint community representatives from Zones 1 and 2 to serve three-year terms on the Budget Committee.

The School Board established the following process during the August School Board Meeting:

- Publicize the openings as broadly as possible using all communication channels in September
- Request a letter of interest and resume from each candidate
- Each Board Member would interview candidates for their zone in October
- Present appointee at the November 13, 2017 School Board Meeting for Board approval

RECOMMENDATION:

BE IT RESOLVED it is recommended that the School Board approve the following appointees to fill the two vacant Budget Committee positions:

Ryan Sweet	Zone 1	2020
John Ng	Zone 2	2020

District Goal: WE empower all students to achieve post-high school success.

The Beaverton School District recognizes the diversity and worth of all individuals and groups. It is the policy of the Beaverton School District that there will be no discrimination or harassment of individuals or groups based on race, color, religion, gender, sexual orientation, gender identity, gender expression, national origin, marital status, age, veterans' status, genetic information or disability in any educational programs, activities or employment.

OK

Budget Committee Volunteer Opportunity (Zone 1)

Sweet, Ryan T <ryan.sweet@usbank.com>

Sun 9/24/2017 10:39 AM

To: Community Involvement <Community-Involvement@beaverton.k12.or.us>;

1 attachments (74 KB)

Resume - Ryan T Sweet.pdf;

registered voter: ✓

Dear Susan Greenberg,

Hello! I was very excited to learn of this opportunity through the district website. With both of my girls currently enrolled at Montclair, I was looking for opportunities to get involved beyond ad-hoc volunteering. With my business/commercial banking background and my experience serving on similar boards and committees, this is right up my alley. Please consider me an enthusiastic candidate.

In regard to qualifications, I have lived in Zone 1 for more than a decade, I am a registered voter in the district and I have never been a BSD employee. I also have completed my background check (last year) for on-site volunteering. My daughters, Kylea Sweet and Jezi Walbridge, are in Kindergarten and Second Grade, respectively, and will continue on to Whitford and then Southridge. I have worked as a credit/finance professional in the metro area for almost two decades, working closely with large and small businesses and associations, and my educational background is in accounting.

I have attached my resume for your review. Please feel free to reach out to me with any questions or to discuss the role.

Thank you for your consideration,

Ryan T. Sweet
Project Manager | The Wealth Management Group
O: 503.464.4528 | M: 503.329.5058 | ryan.sweet@usbank.com

Proud to Serve | President - Oregon & SW Washington Chapter
U.S. Bank Business Resource Group

U.S. Bank
555 SW Oak Street, 6th floor
PD-OR-P6CC | Portland, OR 97204

U.S. BANCORP made the following annotations

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Roles:

- Project Manager
- Quality Specialist (oversight role)
- Wealth Management Credit Analyst
- Private Banking Relationship Manager
- Senior Commercial Credit Analyst
- Business Banking Credit Analyst
- Residential Lending Officer

Tools/Methods:

- MS office Suite: Excel, Word, PowerPoint
- Content Management Systems: TeamSite, SharePoint, Credit+
- Project Management Tools: Visio; VersionOne
- Underwriting Systems: CAPE, APLUS

Industry Application:

- Private Banking
- Commercial Lending
- Small Business Banking
- Residential Real Estate Lending

Experience Summary

Finance industry professional with 15+ years of lending knowledge and experience. Analytical, self-motivated creative and well organized with a history of supporting complex financial transactions and projects. Specialized areas of knowledge include credit analysis, underwriting processes, project management and procedure development. A detail-oriented leader with passion, vision, technical aptitude and a broad background across financial institutions and positions which provide unique insight into the financial services industry.

Skills Inventory

- Project Management, end-to-end: issue analysis, planning, design, build/test, implement to monitor & sustain
- Technical and business use cases and test cases
- Defect management
- Credit analysis for private banking, small business, commercial & industrial and commercial real estate business groups
- Subject matter expert for credit process, risk, collateral and loan pricing
- Operational analysis, process review and process improvement
- Training and team leadership
- Technical writing and process documentation

Education and Involvements

Bachelor of Science Degree – Accounting
University of Phoenix – Graduated 2006

Proud to Serve – U.S. Bank Business Resource Group
Board of Directors – Oregon/SW Washington Chapter
President 2016 - Present

Mountain Park HOA Finance and Audit Committee
Lake Oswego, Clackamas County
Voluntary Member 2004 – 2006

Big Brothers Big Sisters of America
Clackamas County
Volunteer Big Brother 2003 – 2006

U.S. Air Force, Enlisted
Active Duty 1996 – 2000
Reserve 2000 – 2002

Employment History

- Project Manager**, U.S. Bank, Portland, OR 8/2016 – Present
- Responsible for managing projects related to processes, procedures and systems related to the Private Wealth Management division of U.S. Bank.
 - Additional responsibilities include: project team leadership; training; reporting and communications.
- Quality Specialist**, U.S. Bank, Portland, OR 11/2013 – 8/2016
- Leadership role to continually improve underwriting quality within the Private Client Reserve, a division of Wealth Management.
 - Responsible for developing and implementing large-scale solutions to address underwriting issues identified via audits or through other means.
 - Responsible for internal audit sampling to validate solution effectiveness.
 - Responsible for managing and updating internal underwriting guidance and job aids.
- Credit Analyst**, U.S. Bank, Portland, OR 12/2011 – 11/2013
- Responsible for underwriting complex credits within the Private Client Reserve group of Wealth Management.
 - Awarded 2012 Rookie of the Year as a result of outstanding performance.
 - Earned internal recognition on several occasions for going above and beyond expectations.
- Relationship Manager**, The Bank of Oswego, Lake Oswego, OR 8/2009 – 7/2011
- Responsible for developing new commercial banking relationships with a focus on professional service groups.
 - Responsible for managing restructuring and work-out solutions related to problem credits.
 - Member of the bank's internal loan approval committee.
 - Awarded the bank's top salary raise and bonus incentive in January, 2011, as a result of outstanding performance amongst peers.
- Senior Commercial Credit Analyst**, Banner Bank, Portland, OR 2/2008 – 8/2009
- Client facing role with portfolio management responsibilities.
 - Prepared all new and renewal credit memorandums or oversaw underwriting for the bank's Portland Commercial Lending Center.
 - Annual review conducted in February 2009 rated performance as "Exceeds Expectations" in 8 out of 10 categories and "Far Exceeds Expectations" in the remaining 2 out of 10 categories.
- Business Banking Credit Analyst**, Sterling Savings Bank, Portland, OR 9/2006 – 2/2008
- Provided underwriting support for eight business bankers.
 - Excerpt from performance review: "*Ryan is customer focused as is shown through meeting deadlines... Ryan is a team player.*" Cindy Larvick, Vice President, Team Leader.
- Residential Lending Officer**, JPMorgan Chase, Portland, OR 1/2001 – 9/2006
- Named Retail Cross-sell Champion of the Northwest Division for years 2004 and 2005.

Budget Committee application (Zone 2)

incumbant

John Ng <john.ng.oregon@gmail.com>

Mon 9/18/2017 7:26 PM

To: Community Involvement <Community-Involvement@beaverton.k12.or.us>; Anne Bryan <Anne_Bryan@beaverton.k12.or.us>;

 1 attachments (181 KB)

John Ng Resume 2017.09.pdf;

Anne Bryan, School Board Chair

and

Beaverton School District

Communications & Community Involvement Department

16550 S.W. Merlo Road

Beaverton, OR 97003

Dear Anne:

I would like to continue volunteering for the Beaverton School District Budget Committee (Zone 2). Please find attached my resume for your consideration. I have been serving on BSD's Budget Committee and Audit Committee since late 2015, I feel that I have a lot to offer and contribute to our schools and our community.

My wife and I have been living in Bethany neighborhood since 2010 (homeowners since 2013). My son is currently a fourth grader at Jacob Wismer Elementary School, and my daughter has just started kindergarten in the same school. I am a qualified and registered voter of the District, and I am not a BSD employee. Professionally, I am a Certified Public Accountant, and I have extensive experience preparing, reviewing, and monitoring complex financial budgets. I am currently employed as the Chief Financial Officer of a nonprofit organization in Portland.

I would like to serve on the Budget Committee, because I care about our schools, our students, and their education. Please feel free to contact me if you have any questions. I can be reached at john.ng.oregon@gmail.com or by phone at (cell) 503.887.0965 or (work) 503.595.2019.

Thank you for your consideration.

9/19/2017

Mail - Community-Involvement@beaverton.k12.or.us

Sincerely,

John Ng

6498 NW Connery Terrace

Portland, OR 97229



Virus-free. www.avast.com

John Ng, CPA, CGMA

6498 NW Connery Terrace, Portland, OR 97229 • Mobile: 503.887.0965 • john.ng.oregon@gmail.com

**Multilingual CPA with Master of Accountancy degree, nonprofit financial management,
Big Four audits, project management, and international business experience**

QUALIFICATIONS:

- Certified Public Accountant (CPA) and Chartered Global Management Accountant (CGMA) - active status.
- Master of Accountancy degree; in-depth knowledge of GAAP, accounting and audit standards.
- Big Four public accounting and consulting experience; led CPA teams in complex, multinational audits.
- 15 years of progressive fiscal management and full cycle accounting experience in nonprofit/private sectors.
- Strong nonprofit background – serving as CFO at a national health and social services agency.
- Multilingual and multicultural – speaks, reads, and writes English, Japanese, Chinese, and Cantonese.

PROFESSIONAL EXPERIENCE:

Volunteers of America Oregon (a national nonprofit), Portland, Oregon

Chief Financial Officer

4/2016 – present

Controller

2015 – 2016

Senior Accountant

2012 – 2014

- Report to the CEO and manage Finance, Accounting, Billing, QA Compliance, Catering, Housing, and IT.
- Responsible for preparing, managing, and monitoring an agency with \$22 million budget with 8 distinct divisions, 15+ programs, 60+ cost centers, over 330 employees, and multiple locations.
- Manage all external fiscal compliance audits including year-end, OMB A-133 federal, pension, and County audits; ensure that the agency is in compliance with US GAAP, contracts, and fiscal rules and regulations.
- Provide to CEO strategic planning and practical solutions that align accounting and finance functions to overall departmental and organizational goals.
- Establish and maintain proactive lines of communication, keeping CEO and executive & management team informed of agency's financial position and performance.
- Lead financial teams in agency's financial reporting; design, communicate, and implement financial policy, procedures, and internal controls; strengthen efficiency of work flow and effectiveness of services to internal customers; advice and coach division and program directors on fiscal and budgetary matters.

PricewaterhouseCoopers LLP (a multinational CPA firm)

Senior Associate, Assurance, Portland, Oregon

2012

Senior Auditor, Financial Services - Banking & Capital Markets Group, Tokyo, Japan

2006 – 2010

- I led teams of six or more CPAs in providing complex financial audit and assurance services to multinational commercial and investment banks in Japan. My audit clients included the Tokyo Branch of JP Morgan Chase, BNP Paribas, Barclays Bank, Bank of China, Commerzbank, and Fitch Ratings.
- My project management responsibilities included project planning and budgeting, audit risk assessments, contract compliance, coordination with clients and project teams on fieldwork, designing and executing audit procedures, supervising and coaching CPAs during fieldwork, and reporting to audit partners.
- I planned and managed multiple, concurrent audit projects with tight deadlines while maintaining accuracy and attention to details. I ensured that projects stay within budget, teams resolve audit issues, and clients receive value-added services.

John Ng, CPA, CGMA

Resume – Page 2

Hawaii Community Loan Fund (a community development loan fund), Honolulu, Hawaii 2003 – 2005
Financial Analyst (part-time)

The Hawaii Community Loan Fund (HCLF) is a Community Development Financial Institution (CDFI) that provided micro and bridge loans to nonprofits and micro-enterprises in the State of Hawaii. The mission of HCLF was to create entrepreneurship opportunities for individuals and families in economically depressed communities in Hawaii. As Financial Analyst, I assisted the CFO in providing financial consulting and technical assistance to nonprofits and micro-enterprises. I reviewed business plans and analyzed financials and loan applications. I researched and presented credit risk analysis to stakeholders and advised the CFO on lending decisions. To assess outcomes, I developed a system to monitor loan performance and impacts to communities.

Bar Association of San Francisco (a nonprofit organization), San Francisco, California 2002 – 2003
Client Advocate, Volunteer Legal Services Program (VLSP)

The goal of VLSP is to change lives by providing free legal aid to indigent clients. I was the Bilingual Client Legal Advocate at VLSP. I performed client intakes/screening and coordinated wrap-around services for clients. I assisted my clients to obtain legal representation for free by cold calling and recruiting pro bono lawyers. My clients included domestic violence survivors who were seeking emergency assistance, dissolution from abusive spouse, and children custody; juveniles who were smuggled into the U.S. and were detained by law enforcement; and low income clients who were facing wrongful evictions and/or needed bankruptcy legal advice.

Oregon Economic & Community Development Department (a state agency), Portland, OR 1999 – 2001
International Trade Manager, China Market

The State of Oregon contracted trade consultants in China to promote Oregon's exports to China and to attract foreign investments to Oregon. As Trade Manager, I led a team of four trade consultants in Shanghai to provide trade development assistance to small and medium-sized Oregon exporters. I collaborated with Oregon and overseas businesses, trade groups, the U.S. Dept. of Commerce, and foreign government trade agencies to promote Oregon exports. I identified trade leads, marketed Oregon products, and generated exports and jobs for Oregon.

State of Ohio Trade Representative Office in East Asia (a state agency), Hong Kong 1997 – 1999
International Trade Advisor

I served as a trade liaison for the State of Ohio Department of Development's trade representative office in East and Southeast Asia. I promoted Ohio exports to importers in Asia, organized trade shows and product demonstrations, increased the awareness of Ohio-brand among Asian businesses, and generated exports for Ohio.

EDUCATION:

University of Oregon, Bachelor of Arts

University of Hawaii at Manoa, Master of Accountancy

Hitotsubashi University, MBA courses at Graduate School of International Corporate Strategies, Tokyo, Japan

COMMUNITY LEADERSHIP:

Beaverton School Board, <i>Budget & Audit Committee Member (volunteer)</i>	2015 – present
Oregon School Based Health Alliance, <i>Board Treasurer (volunteer)</i>	2015 – present
Kaiser Woods-Bethany HOA, Portland, OR, <i>Board President & Treasurer (volunteer)</i>	2014 – 2016
AARP Tax Aide - Creating Assets, Savings and Hope (CASH), <i>Tax Counselor (volunteer)</i>	2013 – 2014