



# City of Santa Fe, New Mexico

# memo

**DATE:** August 7, 2014  
**TO:** City Council  
**FROM:** Mayor Javier M. Gonzales   
**RE:** Appointments

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I would like to make the following appointments:

**Audit Committee**

Loretta E. Valencia – to fill unexpired term ending 11/2015 (Resume attached)

**Historic Districts Review Board**

William Powell (Old Santa Fe Association) -- to fill unexpired term ending 1/2016 (Resume attached)

**Children and Youth Commission**

Thomas Bustamante – Reappointment – term ending 1/2016  
Joanne Lefrak – Reappointment – term ending 1/2017  
Michael Multari – Reappointment – term ending 1/2017  
Jill Reichman—Reappointment – term ending 1/2017  
Catherine Dry –term ending 1/2016 (Resume attached)

**Santa Fe Regional Juvenile Justice Board**

Mark Caldwell --- Reappointment – term ending 10/2015  
MaryEllen Gonzales – Reappointment – term ending 10/2015  
Judge Mary Marlowe-Sommer – Reappointment – term ending 10/2015  
Deacon Anthony Trujillo – Reappointment – term ending 10/2015  
Sarah Jacobs—to fill unexpired term ending 10/2014 (Resume attached)

**Bicycle and Trail Advisory Committee**

Gretchen Grogan – Reappointment – term ending 6/2016  
Frank Herdman – Reappointment—term ending 6/2016  
Tomas Rivera – Reappointment – term ending 6/2016  
Officer Faron Rodriguez (Santa Fe Police Department) – to fill unexpired term ending 6/2016



# City of Santa Fe, New Mexico

2311 Camino Entrada, P.O. Box 909, Santa Fe, N.M. 87501-0909

## MUNICIPAL COURT

Ann Yalman, *Municipal Judge*

Phone 505-955-5070 Fax 505-955-5159

### *MEMO*

Date: August 1, 2014

To: Mayor Gonzales  
City Councilors  
City Manager, Brian Snyder  
Internal Auditor, Liza Kerr

From: Ann Yalman  
Municipal Court Judge

Subject: Audit Committee

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I wish to nominate a new member, Loretta E. Valencia, CPA. There is a vacancy due to Mr. Randall's employment as the Convention Center Director.

Ms. Valencia is a CPA with her own practice and has served in state and local government as well as the private sector and with non-profits.

I have attached her resume.

**LORETTA E. VALENCIA, BA, MA**  
**CERTIFIED PUBLIC ACCOUNTANT**

2008 ROSINA ST. STE. 6  
SANTA FE, NM 87505  
w: (505) 820-1140  
email: vle100@qwestoffice.net

## PROFESSIONAL SUMMARY

- > DETAIL ORIENTED CPA WITH 25+ YEARS EXPERIENCE IN PRIVATE AND PUBLIC SECTOR;
- > PREPARING FINANCIAL STATEMENTS IN ACCORDANCE WITH GAAP;
- > PREPARING TAX RETURNS FOR INDIVIDUALS, BUSINESSES, NON-PROFITS, ETC. IN COMPLIANCE WITH IRC;
- > MAINTAINING GOVERNMENTAL FINANCIAL REPORTS IN ACCORDANCE WITH GASB.

## CERTIFICATIONS

Certified Public Accountant	NM License 3074	1987 - Present
	NM Firm License 09908	2006 - Present

## WORK HISTORY

**CPA SOLE PROPRIETOR - SANTA FE, NM** **PRINCIPAL/OWNER** 03/2005 - Present

Tax return preparation for Individuals, Partnerships, LLCs, S Corps, C Corps, Non-Profits, Estates, Trusts, and Gifts.  
Financial statement preparation and attestation in accordance with GAAP.  
Provide business advice, tax and financial planning to clients.  
Oversight of client accounting data software conversions.  
Working experience in Quick Books, Sage, Lacerte, MS Office and Adobe software.

**KARDAS, ABEYTA & WEINER, CPA's, PC - SANTA FE, NM** **STAFF ACCOUNTANT - P/T** 01/2000 - 09/2003

Financial statement audit, review, and compilation preparation.  
Tax return preparation.

**SANTA FE COUNTY - SANTA FE, NM** **DEPUTY FINANCE DIRECTOR** 08/1998 - 05/1999

Assistant to Finance Director.  
Oversaw Finance Department staff.  
Analyzed accounting systems for compliance and accuracy.  
Participated in budget development.  
Involved in accounting of County bond issues and repayments.

**STATE OF NM-PERA - SANTA FE, NM** **INTERNAL AUDITOR** 09/1994 - 05/1998

Executed internal audits and special projects directly for PERA Board and Executive Director to confirm compliance with retirement statutes and governmental accounting principles.  
Analyzed and researched issues to improve accounting processes.  
Led group in special project requiring service credit merge.  
Participated in auditor selection process.  
Participated in budget development, including presentation to DFA and Legislature.

**ACTING COMPTROLLER** 05/1998 - 08/1998

Generated agency's monthly financial statements for PERA Board and Executive Director.  
Analyzed balance sheet and income statement.  
Maintained integrity of general ledger.  
Assisted auditors to ensure completion of annual financial statement audit.

**DAVIS & ASSOCIATES, INC. - SANTA FE, NM** **COMPTROLLER** 03/1989 - 09/1994

Generated company's monthly financial statements for principals.  
Analyzed balance sheet and income statement.  
Maintained integrity of general ledger.  
Managed accounting department staff.  
Assisted auditors to ensure completion of annual financial statement audit.  
Ensured various report submission to oversight agencies, bankers and underwriters.

**KARDAS, ABEYTA & WEINER, CPA's, PC - SANTA FE, NM** **STAFF ACCOUNTANT** 08/1984 - 03/1989

Financial statement audit, review, and compilation preparation.  
Tax return preparation.

**EDUCATION**

<b>NEW MEXICO STATE UNIVERSITY - LAS CRUCES, NM</b>	<b>BACHELORS DEGREE: ACCOUNTING</b>	12/1982
<b>NEW MEXICO STATE UNIVERSITY - LAS CRUCES, NM</b>	<b>MASTERS DEGREE: ACCOUNTING</b>	08/1984

**REFERENCES**

MAX E. MYERS	Executive Vice-President, NM Bank & Trust	(505) 946-2515
LORNA O. CALLES	Business Owner/Entrepreneur	(505) 660-3805
ANDREW P.OTTO	Executive Director, Santa Fe Watershed Association	(505) 820-1696
SEANS. WEINER	Principal, Weiner & Cherne, CPA's, PC	(505) 424-7200



WH Studio

WILLIAM POWELL

1601 Don Gaspar Avenue  
Santa Fe, NM 87505

T 505.603.3747

F 505.982.3158

william@whstudionm.com

whstudionm.com

## EXPERIENCE

WH STUDIO: SANTA FE, NM

2007 - PRESENT

Principle of design firm specializing in historic preservation, residential and commercial design - including new construction, additions and remodels. Work also includes museum exhibit design and fabrication. Award winner for low-income housing competition Casas Del Sol, Vado, NM 2007.

NATIONAL PARK SERVICE: DENVER, CO

2010 - PRESENT

Preservation Specialists overseeing and managing HABS documentation and providing preservation technical assistance. Projects have included Stone Cabin, Arches NP, Ranger Cabin, Walnut Canyon NP, Mastodon Mine, Joshua Tree NP, Fort Puite, Mojave National Preserve.

NEW MEXICO MAIN STREET: SANTA FE, NM

2007 - PRESENT

Contract Preservation/Design Program Associate for New Mexico Economic Development Department. Assisting New Mexico Main Street Programs and Arts and Cultural Districts with preservation assessments, design recommendations, retail development and preservation training. Projects have included historic building assessments, parks, streetscapes, downtown wayfinding, rehabilitation of historic structures, project volunteer management and statewide program coordination.

LITHUANIAN INSTITUTE FOR DESIGN AND RESTORATION: VILNIUS, LT

2007

Architect assisting in governmental implementation of urban and rural development in towns of Marijampoles, Trakai, and Klaipeda, LT. Duties include documentation, design recommendations and historic preservation of National assets including the rehabilitation of the Palace Paezeriai into a museum and conference center.

CORNERSTONES COMMUNITY PARTNERSHIPS: SANTA FE, NM

2005 - PRESENT

Contract Preservation Specialists assisting in assessments for Isleta Mission, San Augustine and the production of measured drawings and documentation for Zuni Mission, Nuestra Senora de Guadalupe. Aiding in organizing community volunteer days and education workshops in preservation and community revitalization. Communities in New Mexico have included Questa, Santa Fe, Hatch, Bernalillo, Albuquerque's South Valley and in Mexico Ciudad Chihuahua, and Ciudad Guerrero. On going work at San Miguel Mission (c. 1610) including construction drawings, code compliance and adaptive reuse/design.

THE UNIVERSITY OF NEW MEXICO: ALBUQUERQUE, NM

2005 - 2007

Editorial assistant and Illustrator for book - *The Plazas of New Mexico*, Trinity University Press 2011

DON DUDLEY ARCHITECTS: ALBUQUERQUE, NM

2006

Architect Intern: Commercial and residential design

BOSWORTH HOEDEMAKER : SEATTLE, WA

2004 - 2005

Architect Intern: Residential design

## **EDUCATION**

**University of New Mexico**

2005 - 2011

Master of Architecture/Preservation and Regionalism Certificate

Recipient of American Institute of Architects Academic Scholarship

Recipient of New Mexico Scholars Scholarship

Recipient of New Mexico Heritage Scholarship in Preservation

Recipient of US Green Building Council Student Scholarship

**University of Washington**

2001 - 2005

Bachelor of Arts - Architectural History and Building Systems

Minor in Architectural Studies

Senior Thesis: Contemporary Uses of Northwest Construction and Design: A Historical Approach to Contemporary Regional Architecture.

Deans List 2002 – 3

Gates Scholarship 100% tuition support.

## **ASSOCIATIONS**

Associate American Institute of Architects (Assoc. AIA)

Vice President executive committee Old Santa Fe Association (OSFA)

Member United States Council of Monuments and Sites (ICOMOS)

Member National Trust for Historic Preservation

## William Powell - WHS

William Powell, principle of WH Studio, is originally from the southern New Mexico town of La Luz. He has spent the last fifteen years working in various architecture firms and preservation agencies within the US, Mexico and Europe. After receiving his Bachelors of Architecture - emphasis on history and building construction from the University of Washington, he returned to New Mexico to earn a Masters of Architecture from the University of New Mexico. Mr. Powell's professional experience includes residential construction, infill, retail development, commercial redevelopment and the preservation of Historic Buildings/Cultural Assets including building pathologies and conditions assessments. Mr. Powell has also been trained in HABS/HAER documentation including photography and measured drawings. Clients have included the State of New Mexico, the National Park Service, the Federal Scenic Byways program, private individuals, businesses, and multiple landscape, engineering and architecture firms.

# Catherine Dry

1451 Diolinda Road ♦ Santa Fe, NM 87505 ♦ 505.692.3839 ♦ katedry@gmail.com

## Experience

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**Director, January 2013 – Present**

Santa Fe, NM

*Santa Fe Baby Fund, Santa Fe Community Foundation*

- Manage \$1.1 million endowment to invest in infant and early childhood wellbeing in Santa Fe County.
- Manage Fund contracts.
- Conduct quantitative and qualitative research and analysis to create a yearly plan for investment and evaluation.
- Manage task forces in key priority areas to further Fund's goals.
- Convene and facilitate meetings with stakeholders, write reports and issue guides, create communications plan.
- Participate in local and statewide gatherings on early childhood issues.
- Foster local presence with providers and advocates.

**Communications and Marketing Consultant, 2009 –2012**

Santa Fe, NM

*Catherine DryPR*

- Researched and wrote issue guides on major funding areas for Santa Fe Community Foundation.
- Developed social media marketing strategies for a variety of small businesses.
- Designed and wrote e-newsletters, strategic copy and communications materials.

**PR/Marketing Director, 2007 - 2008**

Cambridge, MA

*Rialto*

- Rebranded landmark restaurant through communications plan focused on e-marketing, public relations, website and collateral redesign.
- Obtained regular press exposure in local, national and international outlets including The Boston Globe, The Boston Business Journal, Boston Magazine, WBUR, The Wall Street Journal, Food + Wine, Esquire Magazine, Body + Soul.
- Created nationally recognized monthly e-newsletter and blog; grew email list from 1,000 to 6,000 recipients.
- Produced special events including guest chef dinners, cooking classes, charitable dinners, lectures and classes.
- Designed all marketing materials including electronic advertising and restaurant collateral.

**Project Manager, 2005- 2006**

Boston, MA

*Oldways Preservation and Exchange Trust*

- Managed projects to preserve and promote traditional foods from the Mediterranean.
- Developed and implemented food policy conferences that brought together journalists, scientists, retailers and importers.
- Organized and led gastronomic tours of Mediterranean regions; designed and managed project budgets.
- Created marketing materials to promote events, including print materials, web content, tastings, lectures and seminars.

**Management Consultant, Research Analyst, 2000 - 2002**

Philadelphia, PA

*Center for Applied Research (CFAR)*

Client work included:

*For a financial services firm:*

- Interviewed 30 employees/clients and identified organizational challenges a World Trade Center firm faced after September 11; recommended strategies for future recovery.

*For a global automobile company:*

- Developed shareholder value tools to train 30 senior executives managing product lines valued at \$5-20 billion.

*For a large, international foundation:*

- Conducted interviews with 35 executive directors of social service agencies to assess nature and quality of relationships with foundation staff as well as grantee use of technical assistance.

## Education

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**Fletcher School of Law and Diplomacy, 2003 – 2005**

Medford, MA

- Recipient of MALD degree specializing in Economic Policy.
- Research Assistant for International Finance Professor and Teaching Assistant for Introduction to Economic Theory.

**J. William Fulbright Fellow, 1999 - 2000**

Trieste, Italy

- Investigated the development of a special *Triestino* style of literature.
- Produced original manuscript of the Italian novel *Inferences on a Saber* by Claudio Magris.

**Wesleyan University, 1994 - 1998**

Middletown, CT

Bachelor of Arts in Italian Studies with High Honors, May 1998.

- Mann Prize for outstanding achievements in Romance Languages and Literatures, 1998.

# Sarah Jacobs

149 Camino Escondido, Santa Fe, NM 87501  
SJacobs@da.state.nm.us: (239) 789-5385

## Education

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**Ave Maria School of Law, Naples, FL**

*J.D.*, awarded May 2012

- Member, Phi Alpha Delta
- Study Abroad, New York Law School, London and Paris 2010

**University of New Mexico School of Law, Albuquerque, NM**

*Visiting Student Status*, August 2011 – May 2012

- Honor Roll, Fall 2011 – Spring 2012

**University of Central Florida, Orlando, FL**

*B.A. Psychology*, awarded May 2008

- Minor in Criminal Justice, Dean's List 2007 – 2008

## Bar Admission

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*New Mexico* – admitted September 2012

## Experience

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**First Judicial District Attorney's Office, Santa Fe, NM**

*Associate Trial Attorney*, September 2013 – Present

- Children's Court Attorney, June 2014 – Present
  - Managed large caseload consisting entirely of juvenile cases. Charging decisions, detention hearings, and taking the cases to resolution.
- DWI Prosecutor September 2013 – May 2014
  - Managed caseload of over 200 cases from criminal complaint to resolution. Drafted and argued motion hearings, selected juries, and conducted trials.

**Community Justice for Survivors of Sexual Violence Project**

*Project Attorney*, September 2012 – September 2013

- Provide a wide range of advocacy services to victims of sexual assault including orders of protection, EEOC claims, employment issues, Title IX issues, landlord tenant, and the ADA.

## **Self-Employed**

*Contract Legal Services*, May 2013 – September 2013

- Conducted research on 2013 changes to VAWA and its' effect on victims of domestic violence for the Southwest Women's Law Center.

**Jenna Yanez, Esq.**

*Extern/Intern*, March 2012 – September 2012

- Collaborated with Ms. Yanez to provide help on a myriad of issues for survivors of sexual assault and domestic violence. Analyzed statutes and constitutional issues and provided information to facilitate in the training of a variety of professionals.
- Drafted motions, pleadings, orders, and provided research and memos on varying issues.

**Julianna Koob, Esq., Lobbyist**

*Extern*, January 2012 – April 2012

- Attended legislative session and followed specific issues of sexual assault and domestic violence
- Prepared documents for bill analysis for New Mexico Coalition of Sexual Assault Programs.

**David Ruyle, Esq.**

*Law Clerk*, June 2011 – January 2012

- Prepared documents, provided research, and contributed to general practice of elder law attorney related to guardianship cases, conservatorship issues, long term case planning, and elder law issues.