



# City of Santa Fe, New Mexico

# memo

**DATE:** February 6, 2014  
**TO:** City Council  
**FROM:** Mayor David Coss *DC*  
**RE:** Appointments

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I would like to make the following appointments:

### **Audit Committee**

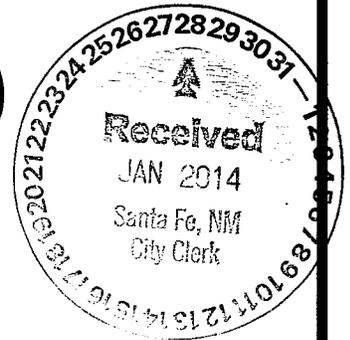
Hazeldine Romero – Reappointment – term ending 11/2016 (Resume attached)  
Marc Tupler – Reappointment – term ending 11/2016 (Resume attached)  
Cheryl Pick Sommer – to fill unexpired term ending 11/2016 (Resume attached)

### **Community Development Commission**

Tobe Bott-Lyons – to fill unexpired term ending 3/2014 (Resume attached)

# City of Santa Fe, New Mexico

# memo



Date: January 27, 2014

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

From: Ann Yalman  
Municipal Court Judge

Subject: Audit Committee

It has come to my attention that there are three Audit Committee members whose terms have expired.

I wish to renominate Hazeldine Romero and Marc Tupler.

Both Ms. Romero and Mr. Tupler have agreed to serve another term.

I wish to appoint a new member, Cheryl Pick Sommer.

Per the Audit Committee Resolution there is no limit on reappointment, and the re-appointment shall be for three years in order to maintain staggering of terms.

Both Ms. Romero and Mr. Tupler provide valuable insight and experience to the committee. Ms. Romero is extremely knowledgeable about auditing having served at the State Auditors office for many years.

Mr. Tupler has been very active in the business and banking community.

Ms. Sommer is a lawyer and small business owner and has been active at the local, state and national levels in business and community organizations. I believe she would bring a new perspective to the Audit Committee.

I have attached their resumes.

**HAZELDINE ROMERO**

**2732 Paseo De Tularosa**

**Santa Fe, NM 87505**

**Home (505) 471-8848**

**Cell (505) 670-1459**

Hazeldine Romero is a life-long resident of Santa Fe.

She is a Certified Public Accountant, Certified Internal Auditor and Certified Government Financial Manager. She received her BBA in Accounting and Management at the College of Santa Fe.

Hazeldine retired from the State of New Mexico in 2006 after 25 years working for the Office of the State Auditor Fraud Unit and the Department of Health and Environment Internal Audit. She is a member of the Institute of Internal Auditors, American Institute of Certified Public Accountants and the Association of Government Accountants.

She is on the St. John the Baptist Catholic Church Finance Council and leads a Church Counting team. She currently volunteers at the St. John the Baptist Catholic Church Soup Kitchen.

She is a member of the College of Santa Fe Alumni – Santa Fe Chapter and is currently the Bingo Manager for the College of Santa Fe Alumni Bingo.

She is a Provisionary member of the Santa Fe Fiesta Council involved in several committees, including the Budget Committee. She is a member of Ladies Auxiliary of the Fraternal Order of Eagles #2811 and was their Auditor for several years.

## EXPERIENCE

WELLS FARGO BANK, Santa Fe, NM

02/2011 to current

**Commercial Banking Officer / Relationship Manager, VP**

- Responsible for **generating, analyzing and managing** commercial real estate assets, business loans and treasury management services
- Provide high-level financial, banking and investment consultation to business, corporate and institutional customers
- Expert **knowledgeable** in financial statement analysis, cash flow, loan structuring and general lending concepts, loan policy and regulatory compliance
- Successfully **interact** with lawyers, CPAs, Directors, Executives, agents and other business professionals on daily basis

SANTA FE 400<sup>TH</sup> ANNIVERSARY INC., Santa Fe, NM

08/2009 – 10/2010

**Interim Executive Director**

- **Directed** institutional project development and fund-raising efforts for the city of Santa Fe's Historic 400<sup>th</sup> Commemoration
- Devised and **implemented** concrete strategies to pursue individual, corporate, foundation, and government funding sources
- Leadership responsibility in **developing** inclusive relationships with the community, business and government agencies
- Directed financial planning, financial systems, and budget decisions, along with preparation and presentation of Board reports

FIRST NATIONAL BANK OF SANTA FE, Santa Fe, NM

02/2008 to 08/2009

**Commercial Banking Officer / Relationship Manager**

- **Responsible** for generating, analyzing and managing commercial real estate assets, business loans and deposits for local bank
- Provided executive-level financial, banking and investment **consultation** to individual, corporate and institutional customers
- Knowledgeable in financial statement **analysis**, cash flow, loan structuring and general lending concepts, loan policy and regulatory compliance

MORGAN STANLEY SMITH BARNEY/CITIGROUP, Santa Fe, NM

1998 to 2007

**Investment Consultant / Portfolio Manger**

- Provided executive-level financial, investment, and wealth management consultation, and insurance needs assessments to individual, corporate and institutional investors, with an \$80 million client base in NM, AZ, CA, NV and TX
- **Respond** to due diligence inquires and present month/quarter/year end performance analyses
- Perform **competitive** analysis and various research projects on client need basis. Run investment performance analytical software
- Analyze and select individual equity securities for inclusion in managed portfolios; create and maintain earnings models on individual companies **leveraging** skills in accounting, finance and economics
- Interpret developments that may impact performance on a longer-term basis such as macro-economic and company-specific news

JP MORGAN CHASE & CO / IMPERIAL BANK, Phoenix, AZ

1992 to 1997

**Vice President / Business Development Officer**

- Responsible for originating, analyzing, marketing, and managing multi-million dollar commercial real estate and large business loans to commercial customers in the Phoenix-metro area

**Commercial Lending Officer**

- Responsible for generating new commercial project loans for largest bank lender in Arizona
- Understanding client needs and identify potential cross-sell opportunities for other financial products and services
- Communicated product knowledge and marketing plans to sales associates and junior level development officers

**Credit Analyst**

- Responsible for complex financial and sensitivity analysis and feasibility research on medium to large corporate customers
- Research specific markets to assess market demand, potential growth, competitiveness of comparable properties, and risks presented
- Participate in property tours and site visits to develop a understanding of complex real estate transactions
- Assemble complex financial models that identify the potential financial performance of an asset, underwriting risks associated with demand, rate, expenses, and supply
- Analyze deal structures and provide pricing guidance for complex multi-million dollar transactions

**Information Analyst**

- Performed budget analysis, variance analysis, and sensitivity analysis for business and corporate entities
- Assisted in the negotiation and suitability of commercial banking assets

## EDUCATION

**B.S., Finance and Accounting**

ARIZONA STATE UNIVERSITY, Tempe, AZ

May 1991

Major: Finance and Accounting **Emphasis:** Computer Science and Urban Planning

Extensive IBMpc and Macintosh computer experience; Mastery knowledge of most current software applications

## OTHER

- Create, direct and implement feasibility studies, efficiency assessments, investment and finance evaluations
- Series 7, General Securities Investment Advisor license, NM-Registered Investment Advisor (former)
- Past Treasurer, Atalaya and Wood Gormley Elementary PTAs
- Basketball coach, SF Youth Leagues

REFERENCES AVAILABLE

**Cheryl Pick Sommer**  
P.O. Box 2835 Santa Fe, NM 87504  
505-988-3977

**EDUCATION**

- J.D. 1991     Juris Doctorate - DePaul University, Chicago, Illinois  
Graduate, With Honors  
Member, DePaul University Law Review  
Member, Order of the Coif
- B.S. 1987     Bachelor of Science, Finance - Arizona State University,  
Tempe, Arizona

**PROFESSIONAL EXPERIENCE**

- Present       PRESIDENT, Kaune’s Neighborhood Market, Inc.  
  
                  OF COUNSEL, Sommer, Udall, Sutin, Hardwick & Hyatt, P.A.  
  
                  MEMBER MANAGER,  
                  PBS Limited Liability Company  
                  DCC, Ltd. Co.
- 1995 -  
Oct. 2003     DIRECTOR/SHAREHOLDER/PARTNER/DIRECTOR OF PERSONNEL  
Sommer Udall, Hardwick, Ahern & Hyatt, LLP  
formerly Sommer, Fox, Udall, Othmer & Hardwick, P.A.
- 1991 -  
1995         ASSOCIATE ATTORNEY  
Sommer, Fox, Udall, Othmer & Hardwick, P.A.

**PROFESSIONAL AFFILIATIONS**

- National Grocers Association
  - Member, Board of Directors 2011-present
  - Member, Executive Committee 2012-present
  - Past Member, Government Affairs Committee, Audit Committee
- Food Industry Self Insurance Fund
  - Member, Board of Directors 2004-present (Current Secretary)
- New Mexico Grocers Association
  - Member, Board of Directors 2004-present
- El Castillo Retirement Residences
  - Member, Board of Directors 2010-present (Current Secretary)
- U.S. Bank
  - Member, Community Advisory Committee 2011-present
- State Bar Association of New Mexico, Member 1991-present

## CIVIL ACTIVITIES

Louisiana Lasallian Education Corporation, New Orleans, Louisiana  
Member, Board of Trustees 2011-present  
St. Michael's College, Santa Fe, New Mexico  
Member, Finance Committee - 2008-2012  
Member, Past President, Board of Directors - 1992-2008  
De La Salle High School, New Orleans, Louisiana  
Member, Board of Trustees - 2011-2012  
Christus-St. Vincent Regional Medical Center  
Member, Governance, Community and Governmental Affairs Committee 2012  
St. Vincent's Hospital Institutional Review Board, Santa Fe, New Mexico  
Alternate Member - 2009-2011  
First Community Bank Community Advisory Board, Santa Fe, New Mexico  
Member - 2006-2011  
New Mexico Alliance for Legal Reform, Member Board of Directors 2006-2008  
Teen Court, Participant Judge, 1995-1996  
Santa Fe High School Mock Trial Team, Attorney Coach, 1995

## HONORS

2011 New Mexico Top Performing CEO - Small Business Category  
2011 City of Santa Fe Small Business of the Year  
Awarded to Kaune's Neighborhood Market  
2011 CNBC Special - "Supermarkets, Inc."  
Kaune's Neighborhood Market featured independent grocer  
2011 New Orleans - Santa Fe District Mission Assembly Participant  
2010 NGA Creative Choice Award for Advertising  
Best Print Ad Awarded to Kaune's Neighborhood Market  
2005 Graduate, NGA/Cornell Executive Leadership Program  
Affiliate Member (2001), De La Salle Christian Brothers, New Orleans/Santa Fe District  
2000 Huether Leadership Conference Participant  
1999 De La Salle Christian Brothers, District Chapter XI - Regional Legislative Meeting

## Education and Training:

### **New School For Social Research** (New York, New York)

Graduated 2004

BA – Major: Cultural Studies Minor: Education

2002-03 *University Service Award*

2004 *Alma Mater Award*

03-04 *Dean's List*

GPA – 3.6

### **Santa Fe Community College Teacher Academy** (Santa Fe, New Mexico)

Alternative Licensure Program: Secondary & Special Education

Intern Licensure: Secondary Social Studies (expired)

### **University of New Mexico** (Albuquerque, NM)

Community and Regional Planning Program

Masters Candidate– Community Development

*Phi Theta Kappa Honor Society*

GPA – 4.1

### *Other Training:*

**Project Lead the Way Instructor Academy** – Introduction to Engineering Design (2010)

**Youth Cultural Competency** – Youth Development Research Fund (2007)

### *Awards:*

**Education Hero Award - Education Advocate** – United Way of Santa Fe County (2012)

## Work Experience:

Data management for NEOGOV on-line recruitment

Development of outreach and recruitment projects including: website, media strategy, community outreach

Development of an internship program for both college graduates and veterans

Development of Career Services Bureau policies, procedures and memorandum

6/06 – 1/13 – ¡YouthWorks! (Santa Fe, New Mexico)

- **Deputy Director (06/09 – Present)** Full-time, salaried position
  - YouthBuild Program Director**
    - *Project Development and Coordination* – Design, implementation and supervision of \$934,000 US DOL YouthBuild grant administration
    - *Program Design and Curriculum Development* – Development of a ten-month, highly structured education and training program for at-risk youth that includes Literacy/Numeracy Instruction, GED Prep, Construction Certification, Community Service, and Post-Secondary Readiness and Career Planning & Advisement
    - *Program Administration* – Oversight of fiscal and administrative management, all grant reporting requirements, personnel and partner management (including hiring, professional development, and daily supervision), development and implementation of internal policies, standard operating procedures, and quality assurance measures
  - Other Duties**
    - *Strategic Planning and Organizational Development* – Work with Executive Director, Board of Directors and outside agencies/partners in the growth and expansion of

- programs and organizational activities; Represented YVW to various boards, panels, advisory groups
- *Personnel Management and Administration* – Development of staff job descriptions, directed recruitment, selection, orientation, training and evaluation of new staff
- *Development, coordination, and implementation of multiple alternative education and workforce development programs for high-risk youth* – including: School of Success GED & College Readiness; nationally-recognized Green Jobs Apprenticeship and Workforce Innovation; Energy Efficiency & Weatherization; Santa Fe River Restoration; Youth Conservation Corps; and multiple other job training and career development projects
- *Fundraising and Development* – Over \$2.5 million in successful grants written and contracts awarded; Oversaw organizational growth from \$300,000 to \$1.3 million annual budget
- *Management of multiple grants and contracts* – Including budget management, invoicing/billing, data management and reporting (Federal, State, Local and Private sources), oversight of contract compliance and quality assurance
- *Community Outreach & Public Relations* – Coordination of annual fundraisers, media and public relations activities, supervision of social media and website
- *Logistics* – Management of day-to-day operations including planning, scheduling, crisis management
- *Case Management, Student Support and Advisement* – Provide direct student services related to case management, crisis intervention, personal development planning, college enrollment and advisement
- **Education Director (7/07 – 06/09) Full-time, salaried position**
  - Lead GED Prep and Developmental Education Teacher
  - Planning, development and implementation of Alternative Education Program, In-School Prevention Training, Afterschool Programs, and Workforce Development Activities
  - Coordination of curriculum development & instruction for all programs
  - Maintenance of student records and related Grant/Contract reporting & evaluation
  - Teacher and facilitator training
- **GED Instructor & Lifeskills Facilitator (6/06 – 7/07) Part-Time, contract position**
  - Design and delivery of Basic Literacy/Numeracy Skills, GED Preparation and Lifeskills curriculum

8/08 – 5/11 (Santa Fe, New Mexico)

**Adjunct Faculty** – Santa Fe Community College (Business and Technologies)

- Courses Taught: *ENGR 111: Introduction to Engineering*, and *STEM 111: Introduction to Science, Technology, Engineering and Mathematics*.

10/05 – 7/07 (Santa Fe, New Mexico)

**Youth Resiliency Coach** - Santa Fe Targeted Community Action Program (SF Regional Juvenile Justice Board)

- Development and implementation of strengths-based intervention program for highest-risk juveniles in the Juvenile Probation and Parole system
- Provide start-up support, strategic planning, and program design through planning and pilot year
- Participant in weekly client staffing and bi-weekly performance management and systems reviews meetings
- Development of training materials, succession planning, and transition support for replacement staff

2/05 – 5/06 (Santa Fe, New Mexico)

**Youth Care Worker** – La Otra Puerta Youth Crisis Shelter

- Daily direct care and supervision for youth in crisis
- Provide orientation and training to all new hires
- Insure that all company and CYFD rules, regulations and policies are complied with
- Advise Board of Directors on recruitment and retention of qualified personnel and assistance developing policy recommendations regarding employee relations

01/04 – 01/05 (Santa Fe, New Mexico)

**Teacher** – Santa Fe Public Schools

- Substitute Teacher (Middle and High School)
- Special Education Teacher for Emotionally Disturbed Middle School students

## **Other Experience:**

### **City of Santa Fe River Commission (3/07 – 3/10)**

Mayoral appointee to City of Santa Fe advisory Commission on River Restoration and Water Resource Management Policy (8 hours per month)

### **Juvenile Community Corrections Local Selection Panel (9/05 – 10/06)**

Selection and evaluation of youth for alternative to incarceration community corrections program (4 hours per month)

### **Santa Fe Living Wage Network Coordinating Committee (08/04 – 02/07)**

Personal responsibilities included: grant writing and fundraising; public relations and media outreach; personnel management (establish employment procedures and policies, job descriptions and directed outreach, recruitment, selection, training and supervision of two staff members) (80 hours per month)

/ Tobe Bott-Lyons / 4354-C San Benito / Santa Fe, NM 87507/  
/ [tbottlyons@gmail.com](mailto:tbottlyons@gmail.com) / (505) 795-9147/