

4-15-13
3:45 pm



Please return this application by email to Deborah Turner, deborahturner@berkeley.net, or in person to the Superintendent's office at 2020 Bonar Street, Suite 321 **by 4:00pm on April 15, 2013**. Late submissions will not be accepted.

APPLICANT INFORMATION

Zoidis _____ Mark _____ J. _____
(Last Name) (First Name) (Middle Initial)

Home Address: _____ CA 94703

Home Phone: _____ Cell Phone: _____

Email: _____ How long have you lived in Berkeley? 6 years

Please attach a document with your answers to the 9 questions below, along with your current resume or curriculum vitae. Do not submit any additional items. Please note that all materials submitted, with the exception of your personal contact information, will be available to the public.

Please answer the following questions (200 word limit each):

1. Why do you want to be a School Board Director?
2. What strengths would you bring to the School Board?
3. What are your three top priorities for Berkeley public schools?
4. How would you work with your fellow Board members and Superintendent to address these priorities?
5. How does your experience and knowledge lend itself to promoting the District goals of addressing the opportunity gap and the 2020 Vision?
6. What are the greatest assets and strengths of BUSD?
7. What do you see as your primary role and responsibilities as a School Board Director?
8. How does an effective School Board ensure opportunities for families and community members to express a diverse range of views to inform Board deliberations on important policy issues?
9. What has been your involvement with public schools and/or in the community?

Application for Mark Zoidis, BUSD board seat.

1. **Why do you want to be a School Board Director?** Last summer I parsed and studied a decision relating to reorganizing Washington elementary school campus that I felt was wrong. I organized a group of parents to reverse the decision at the district level. Eventually we did reverse the decision. Along the way I met the head of the union, BUSD board members and previous and current Superintendents. So this gave me the relationships to start to e-mail in ideas on other issues such as gardening and real estate. Broadly, the process made me start thinking about applying my analytic skills that I use every day in the financial markets on educational issues. As a parent in the system with these strong quantitative skills I think I can add to the board's decision making capacity.
2. **What strengths would you bring to the School Board?**
 - 1) An understanding of inclusive decision making that takes into account the stakeholders in a situation.
 - 2) Quantitative Abilities: numeric ability to parse decisions and norm them against other similar numbers. I believe that nearly any decision can be modeled numerically.
 - 3) Common sense.
3. **What are your three top priorities for Berkeley public schools?**
 - 1) Revising costs for real estate projects at BUSD so that the large amount of bond money is spent wisely. Over \$600 per square foot, plus 30% soft costs for new construction is just too much.
 - 2) Dealing with the Union in a win/win way where teachers are getting their needs met without costing so much that the situation is unsustainable.
 - 3) Adjusting the attitude from "There is no money to do anything" to "Anything is possible."
4. **How would you work with your fellow Board members and Superintendent to address these priorities?** Numeric modeling and best practices is the short answer. Emailing and document collaboration constantly is a big part. I really want to look at numbers versus similar districts in each of these 3 areas. For all of these issues we must look to other districts to see what is working and how these issues are being addressed. For example for real estate, it may be competitive bid that brings costs in. Labor is the hardest issues but same idea, how do we stack up in pay, benefits, hours worked, etc.
5. **How does your experience and knowledge lend itself to promoting the District goals of addressing the opportunity gap and the 2020 Vision? I have a background in corporate social**

responsibility brings this perspective of cultivating human capital is the most important priority of any enterprise.

As a parent of young kids I have seen it play out from a very young age. The independent data confirms that outcomes are largely baked in by second grade along the lines of socio-economic status unless there are interventions. More "High 5" type programs for at risk youth as young as possible 4 and 5 years old can only help. Real progress will take reaching families before they are in the BUSD system and reinforcing the importance of reading with their children.

This 2020 vision area is the most ripe for Cal Berkeley and BHS involvement. It is also an area where money can be raised independently from corporate and philanthropic sources.

6. What are the greatest assets and strengths of BUSD?

- 1) Smart and committed parents, fantastically talented teacher and staff because the labor pool is so great.
- 2) Proximity to Cal Berkeley, one of the great higher learning centers of the world.
- 3) An unstoppable momentum in terms of the fabric of society improving in the east bay. This includes education, civil society, commercial activity, crime, real estate prices. For example, 94703 was the number one appreciating zip code for real estate in 2011.

7. What do you see as your primary role and responsibilities as a School Board Director? To help make smart and well thought out decisions to be made by running the numbers and comparing to comparable situations.

8. How does an effective School Board ensure opportunities for families and community members to express a diverse range of views to inform Board deliberations on important policy issues? One thing that Leah Wilson did was to hold office hours so that people can come and talk about whatever issue they may have. I think all board members should do that. Another is to answer e-mail something that Leah and Josh Daniels both do well.

There is no better way to get opinions than going to events and talking with community members. I would try to do this as much as possible.

9. What has been your involvement with public schools and/or in the community?

Parent activist at Washington Elementary summer 2012 where I developed a spatial density analysis, coordinated a petition (36 signatures), and sought union pressure to reverse site decision on putting largest class sizes in the smallest classrooms (see question 1 for more on this).

Discussing with BUSD staff the idea of saving the Gardening teacher program by replacing all elementary school after school programs with cooking and gardening teachers. This way the programs can be saved in a cost neutral way.

Recently I have been involved with the relocation of BHS Portables to Washington Campus, BAM and other locations. This has put me in communication with board members, and Superintendants about prop 65 issues related to this relocation program and the associated costs.

MARK J. ZOIDIS

4703

EXPERIENCE

Independent Financial Advisor

2006-present

Managing client portfolios of stocks, funds, money managers, ETF's, often involving concentrated positions. Private Equity due diligence.

Financial Software:

2006-2010

Designed and maintained software for quarterly and mid quarter performance monitoring. Produced quarterly client presentations for mid-sized wealth management firm. The software tracks multiple accounts over multiple time frames with graphs, and charts, intensive calculations.

Wealth Management

1997- 2005

Progressive Asset Management

Oakland, CA

Marketed and maintained institutional financial consulting relationships involving social screening criteria for investors seeking market rate returns utilizing Modern Portfolio Theory approach. Work included quarterly market commentary, performance monitoring, manager searches, asset allocation analysis, investment policy development, and implementation of investment policy.

Product Development

1992-1996

Vice President, Progressive Portfolio Services (Financial Consulting Division of Progressive Asset Management). Co-founded and developed managed money division, designed to offer institutional investors multi-asset class investment management using independent managers and social screens. Developed asset allocation methodology, style balancing, manager searches, re-balancing policies, wrote questionnaires, marketing pieces, proposals, and developed performance monitoring software. Managed department of five, oversaw rapid growth in assets from zero to over \$350 Million in 4 years. Since 1995, responsibilities focused on institutional and retail sales.

Institutional Bond Sales/Research

June 1991 - January 1992

Expansion Capital Management

San Francisco

Sold high yield bonds to institutional portfolio managers and provided research on bond issues, many of which were in reorganization.

Project Manager

January 1989 - October 1990

Delta Development Group

Philadelphia, PA

Wrote business plans, provided strategic planning for small businesses seeking early stage capital. Marketed services to potential clients, primarily worked with emerging technology companies and real estate projects.

Merchant Banking Analyst/Associate

December 1986 - January 1989

Butcher & Singer, Inc.

Philadelphia, PA

Assistant to the President of Merchant Banking Subsidiary. Screened incoming projects, quantitative analysis, and placement of financings with banks, institutions, corporations and high net worth individuals.

PROFESSIONAL DESIGNATIONS: Series 7: 15 years, Series 63: 15 years, Series 65: 7 years

EDUCATION

Haverford College, Haverford, PA

B.A. Economics, December 1986

Resident Advisor, NCAA Lacrosse 3 years Varsity Team

Germantown Academy, Fort Washington, PA, High School. Captain 2 sports, awards, Athletic Hall of Fame.

OTHER

I remain sporadically active in Social Investment Forum, Business for Social Responsibility, Investor's Circle, and Social Venture Network. Interests include Outdoors, Music, and Gourmet Cooking.