

**OFFICE OF THE BOARD OF EDUCATION**

1000 Broadway, Suite 300  
Oakland, CA 94607-4033

[ousd.org/boe](http://ousd.org/boe) | [boe@ousd.org](mailto:boe@ousd.org)

510.879.8199 w | 510.879.2299 f | 510.879.2300 TTY/TDD



**OAKLAND UNIFIED  
SCHOOL DISTRICT**

Community Schools, Thriving Students

**BOARD OF EDUCATION 2020**

**Jody London**, President, District 1

[jody.london@ousd.org](mailto:jody.london@ousd.org)

**Shanthi Gonzales**, Vice President, District 6

[shanthi.gonzales@ousd.org](mailto:shanthi.gonzales@ousd.org)

**Aimee Eng**, District 2

[aimee.eng@ousd.org](mailto:aimee.eng@ousd.org)

**Jumoke Hinton Hodge**, District 3

[jumoke.hintonhodge@ousd.org](mailto:jumoke.hintonhodge@ousd.org)

**Gary Yee**, District 4

[gary.yee@ousd.org](mailto:gary.yee@ousd.org)

**Roseann Torres**, District 5

[roseann.torres@ousd.org](mailto:roseann.torres@ousd.org)

**James Harris**, District 7

[james.harris@ousd.org](mailto:james.harris@ousd.org)

January 22, 2020

Legislative File Id No.: 20-0156  
Introduction Date: 1-22-2020  
Enactment No.: 20-0151  
Enactment Date: 1-22-2020 er

To: Board of Education

From: Jody London

Subj: Appointment – William Masterson – Measure G Parcel Tax Independent Citizens Oversight Committee

**ACTION REQUESTED**

Ratification by the Board of Education of President of Board’s appointment of William Masterson to the Measure G Parcel Tax Independent Citizens Oversight Committee, effective February 1, 2020, for term ending January 31, 2022.

**BACKGROUND/DISCUSSION**

The duties of the Measure G Committee, as defined by Board Bylaw 9131, is to inform the public concerning the expenditure of parcel tax revenues and to review and report on the proper expenditure of taxpayers’ money generated by the 2009 Measure G parcel tax.

The Measure G Committee is composed of seven members, with staggered terms, appointed pursuant to membership criteria established by Board Bylaw 9131, with an individual's terms of appointment limited to a maximum of three two-year consecutive terms or the fulfillment of unexpired terms thereof.

There currently exists one vacancy and there will be two additional vacancies on the Measure G Committee as of February 1, 2020.

I, pursuant to Board Bylaw 9131, hereby nominate William Masterson, as a member of Measure G Committee, and recommend ratification of his appointment.

JL:ER:lf

Application: William Masterson (Redacted In Part)

**Profile**

William

First Name

Masterson

Last Name

wgmast01@gmail.com

Email Address

**Which Boards would you like to apply for?**

Measure G Parcel Tax Independent Citizens Oversight Committee: Submitted

Charter School Governing Board: Submitted

Street Address

Suite or Apt

Oakland

City

CA

State

94609

Postal Code

**Which Board of Education election district (1, 2, 3, 4, 5, 6, or 7) do you live in? \***

District 1

Home:

Primary Phone

Home:

Alternate Phone

AllTrails

Employer

Head of Finance

Job Title

Finance

Occupation

**Employer's Street Address**

530 Bush Street

**Employer's City**

San Francisco

**Employer's State**

ca

**Employer's Zip**

94108

**Work Phone**

**Work Email**

**Interests & Experiences**

**Please explain briefly your interest in serving on this Committee, Commission or Board:**

My wife and I moved to Oakland two years ago, and we have two young daughters who will likely join the public school system soon. I would love to get more involved and help improve our public school systems, and this seems like an appropriate fit given my background.

**Please indicate your other community involvement (work with public agencies, volunteering, other Committees, Commissions, Boards, groups, etc.):**

I have not done a lot of community service since college, where I mentored at boarding schools for disadvantaged youth.

  
  
Upload a Resume

Question applies to Measure G Parcel Tax Independent Citizens Oversight Committee, Measure N - College & Career Readiness Commission

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**Please select all that apply:**

- Community member who does not currently have a child enrolled in the District
- Demonstrated financial expertise
- A property owner within the District

Question applies to Measure G Parcel Tax Independent Citizens Oversight Committee

**Please state the details of your selections above. For example, your child's name and school, skills and training, property address, etc.**

- 10+ Years Working in Various Finance Roles - Own Property at 692 62nd Street, Oakland - 2 young daughters who will likely join Oakland public schools in a few years

Question applies to multiple boards

**Do you have any reason, such as a potential or actual conflict of interest (real estate, business, litigation, etc.), which may or will adversely affect your ability to serve on this Commission, Committee or Board.**

- Yes  No

Question applies to multiple boards

**If Yes, please explain.**

Question applies to multiple boards

**Educational Background – e.g. college and/or university, degree/major, vocational and/or training, certificates, technical training, etc.**

MBA Harvard Business School BS Economics University of Kentucky

Question applies to Measure G1 - Districtwide Teacher Retention and Middle School Improvement Act Oversight Commission, Measure G Parcel Tax Independent Citizens Oversight Committee, Measure N - College & Career Readiness Commission

**Are you now, or have you ever been an employee or official of the Oakland Unified School District?**

Yes  No

Question applies to Measure G1 - Districtwide Teacher Retention and Middle School Improvement Act Oversight Commission, Measure G Parcel Tax Independent Citizens Oversight Committee, Measure N - College & Career Readiness Commission

**If Yes, please explain.**

Question applies to Measure G1 - Districtwide Teacher Retention and Middle School Improvement Act Oversight Commission, Measure G Parcel Tax Independent Citizens Oversight Committee, Measure N - College & Career Readiness Commission

**Are you now, or have you ever been a vendor, contractor, or consultant for the Oakland Unified School District?**

Yes  No

Question applies to Measure G1 - Districtwide Teacher Retention and Middle School Improvement Act Oversight Commission, Measure G Parcel Tax Independent Citizens Oversight Committee, Measure N - College & Career Readiness Commission

**If Yes, please explain.**

Question applies to Charter School Governing Board

**Question applies to the Charter School Governing Board**

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Building Board presentations for several years now, and sit on Board Meetings for my current employer AllTrails

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10+ Years working in various finance roles. Have always had a strong interest in education, and would like to get more involved.

Question applies to Charter School Governing Board

**Question applies to the Charter School Governing Board**

Worked for years in investor relations at Visa, which involves meeting with investors from around the world to drive further investment.

**Question applies to the Charter School Governing Board**

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At AllTrails, since we do not have a Legal expert in-house, the legal administration falls to me, which means I oversee our hired legal counsel.

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**Demographics**

Choosing not to answer any of the questions in this section will not disqualify you from consideration or serving.

**Ethnicity**

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Caucasian/Non-Hispanic

**Gender**

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Male

**Socio-Economic Group**

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██████████

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**Verification**

Please indicate your agreement with the following statement

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I have reviewed and understand the duties of the Commission or Committee for which I am submitting this application. I agree to perform said duties. I certify under penalty of perjury under the laws of the State of California that the foregoing is true and correct.

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I Agree

Your application must be **completed and submitted on-line via this web form**. For assistance, if needed, or response to questions, please contact Edgar Rakestraw, Jr., Executive Assistant, Board of Education, Oakland Unified School District, 1000 Broadway, Suite 300, Oakland, CA 94607-4033 or 510/879-8658 or via email at [Edgar.Rakestraw@ousd.org](mailto:Edgar.Rakestraw@ousd.org). Your application must be **submitted** by the applicable deadline, if any.

**Note: This application and your responses are a Public record and subject to disclosure.**

**William Masterson**

Oakland, CA 94609  
wgmast01@gmail.com

**experience**

- 2019 - Present **ALLTRAILS, INC** **SAN FRANCISCO, CA**  
**Head of Finance**
- As first finance hire, built the Finance function at \$100M, subscription based, tech company.
  - Led acquisition and integration of 3 companies, raised \$15M in debt, and oversaw legal entity restructuring.
  - Built cohort-based financial model to drive revenue projections within 2%.
  - Oversaw the company's first audit, managed payroll, close processes, payables and HR processes.
- 2013-2018 **VISA INC** **SAN FRANCISCO, CA**  
**Senior Director, Investor Relations**
- Drove investor communications with Visa's sell-side analysts and investors.
  - Worked closely with CEO and CFO and staff to prepare Earnings communications and filings.
- Senior Director, Corporate Finance**  
Drove collaboration across Global Finance to provide insight into Visa's financials, revenue drivers, and outlook.
- Managed the company's short and long term global P&L forecast of \$13B in revenue and \$6B in net income.
  - Drove global budget and forecast process worldwide, collaborating with regional finance teams across world.
  - Worked closely with CFO and Investor Relations to prepare presentations for Earnings and Board meetings.
  - Advised Controller, Treasurer, and CFO's on optimal org structure of over 800 Finance employees.
  - Managed team of 5 Analysts and Directors to generate Visa's financial analytics for Executive Committee.
- 2011-2012 **GREENHILL & CO** **SAN FRANCISCO, CA**  
**Associate, Mergers & Acquisitions**  
Provided M&A advisory services to clients primarily in the technology industry.
- Performed various valuation analyses for \$2B semiconductor buy-side M&A process including public market comparables, precedent transaction, discounted cash flow, sum of the parts and accretion/dilution.
  - Advised leading semiconductor company on its unsolicited offer to acquire target.
  - Led \$3B sell-side process for information services client and generated materials for over 10 potential buyers.
  - Managed multiple analysts to develop acquisition ideas, financial analysis and presentation materials.
- 2007-2009 **DELOITTE CONSULTING, CFO SERVICES** **SAN FRANCISCO, CA**  
**Strategy and Operations, Consultant**  
Collaborated with multi-national teams of consultants and clients in developing recommendations to executives.
- Advised clients on various projects including benchmarking analysis to drive cost reductions during downturn, design of financial reporting structure and metrics, and finance operations process improvements.
  - Led process design for receivables department, gathering data from global teams and applying six sigma analysis to develop single global process.
- 2005-2007 **GENERAL ELECTRIC COMPANY, INDUSTRIAL SEGMENT** **LOUISVILLE, KY**  
**Financial Management Program (FMP), Analyst**  
Completed four rotational assignments at four businesses within GE Finance with honors. Obtained Six Sigma Greenbelt Certification and led Education and Social Committees.
- Controllership, *Consumer & Industrial*: Led Sarbanes Oxley initiative for \$14B segment.
  - Global Supply Chain, *GE Security*: Forecasting and reporting for three newly acquired businesses.
  - Financial Planning & Analysis, *GE Lighting*: Developed quarterly financial statement review process.
  - Cost Accounting, *GE Industrial*: Conducted LIFO, overhead, and surplus/deficit calculations.

**education**

- 2009-2011 **HARVARD BUSINESS SCHOOL** **BOSTON, MA**  
Master in Business Administration, June 2011.
- 2002-2005 **UNIVERSITY OF KENTUCKY** **LEXINGTON, KY**  
Bachelor of Science degree, *magna cum laude*, in Economics. Speaker at Business School Graduation.
- 2001-2002 **UNIVERSITY OF LOUISVILLE** **LOUISVILLE, KY**