

**STAFF REPORT FOR CALENDAR ITEM NO.: 9**  
**FOR THE MEETING OF: November 10, 2022**

**TRANSBAY JOINT POWERS AUTHORITY**

**BRIEF DESCRIPTION**

On February 15, 2007, the TJPA Board of Directors approved the appointment of the fifteen inaugural members to the TJPA Citizens Advisory Committee (TJPA CAC). The inaugural CAC meeting was held in April 2007, and the newly appointed members drew lots to determine which would serve initial one-year terms and which would serve full two-year terms. The expiration of subsequent terms has been staggered accordingly.

The TJPA CAC bylaws specify that members be selected to represent the following constituent categories:

1. Daily Caltrain Rider into San Francisco
2. Daily AC Transit Transbay Rider into San Francisco
3. Daily MUNI Rider on a line that terminates at or passes through the Transbay Terminal
4. Local Resident from District 6 (zip code 94105 or 94107)
5. Local Business from District 6 (zip code 94105 or 94107)
6. Environmentalist
7. Member of a Planning or Good-Government Non-Profit Organization
8. Representative from Labor
9. Bicycle Advocate
10. Disabled Advocate
11. San Francisco Based Public Transit Advocate
12. Regional Transit Advocate
13. Regional Transit Advocate
14. Member of the Citywide (San Francisco) Business Community
15. Member with Expertise in Real Estate Development or Real Estate Finance

The criteria for membership were established to ensure a qualified committee of regional stakeholders with a diverse array of knowledge and interest/advocacy aligned with the principal components that define the Transbay Program. Membership requires affiliation with at least one category, and the bylaws further specify that this mix of representation be preserved when replacement members are appointed to the CAC.

Within the last couple of months, three seats became vacant: full-term Member with expertise in real estate development or real estate finance, full-term Daily AC Transit Transbay Rider into San Francisco and mid-term Local Resident from District 6 (zip code 94105 or 94107). Since the first two seats will be up for full-term recruitment in January 2023, we are only recommending filling the mid-term Local Resident from District 6 (zip code 94105 or 94107) seat.

In reviewing the applications received from our recent 2022 recruitment efforts, we found three applicants who had checked the Local Resident from District 6 (zip code 94105 or 94107) category. After reviewing those applications, staff is recommending that the Board of Directors

appoint Natasha Paterson as a new member to fill the Local Resident from District 6 (zip code 94105 or 94107) seat.

### **APPLICATION SOLICITATION OUTREACH**

Prior to forming the CAC, TJPA staff developed, and the TJPA Board of Directors approved, an application for membership that asks for qualifications for membership, a statement of the applicant's objectives and goals, and affiliation(s) and references. This same application has been used in soliciting new members.

In September 2022, the Local Resident from District 6 (zip code 94105 or 94107) seat became vacant. We reviewed the applications received from our recent 2022 recruitment and found three applicants who had checked the Local Resident from District 6 (zip code 94105 or 94107) category and selected the applicant who was most qualified.

### **APPLICATIONS RECEIVED**

The TJPA received three applications from one woman, and two undeclared, who are all San Francisco residents. The applicants' ethnicity included one Caucasian, and two undeclared individuals.

### **RECOMMENDATIONS FOR APPOINTMENT TO THE TJPA CAC**

Staff recommends approval of Natasha Paterson for appointment in the indicated category, pursuant to Article 2, Section 4 of the Bylaws of the Transbay Joint Powers Authority Citizens Advisory Committee. The recommended member is a San Francisco Resident of District 6.

### **NEXT STEPS**

The attached resolution appoints the recommended applicant for membership to the TJPA CAC. Upon approval, the appointed member will be invited to the next meeting of the TJPA CAC in December 2022. Meetings are held at the TJPA office at 425 Mission Street, Suite 250, San Francisco, CA 94105.

### **TIMELINE**

November 10, 2022 TJPA Board of Directors Considers Recommended CAC Membership  
December 2022 Next TJPA CAC Meeting

### **RECOMMENDATION**

Adopt the resolution approving the appointment of one member to the TJPA CAC as recommended.

### **ENCLOSURES**

1. Application of recommended TJPA CAC Member
2. Resolution

**TRANSBAY JOINT POWERS AUTHORITY  
BOARD OF DIRECTORS**

**Resolution No. \_\_\_\_\_**

WHEREAS, On October 27, 2006, the Transbay Joint Powers Authority (TJPA) Board approved the creation of the TJPA Citizens Advisory Committee (TJPA CAC) and Bylaws; and

WHEREAS, The approved TJPA CAC Bylaws call for a CAC comprised of fifteen members; and

WHEREAS, The TJPA CAC first met on April 10, 2007; and

WHEREAS, The Local Resident from District 6 (zip code 94105 or 94107) seat on the CAC became vacant in September 2022; and

WHEREAS, The TJPA had solicited applications for membership from the public in 2022 and received three applications that checked the Local Resident from District 6 (zip code 94105 or 94107) category; and

WHEREAS, Natasha Paterson is recommended for appointment to the Local Resident from District 6 (zip code 94105 or 94107) vacancy on the TJPA CAC; and

WHEREAS, The recommended applicant is a San Francisco resident with a diverse range of interest, expertise and background and represents the regional nature of the Transbay Program; now, therefore, be it

RESOLVED, That the TJPA Board of Directors appoints the recommended applicant to serve as a member of the TJPA CAC.

I hereby certify that the foregoing resolution was adopted by the Transbay Joint Powers Authority Board of Directors at its meeting of November 10, 2022.

\_\_\_\_\_  
Secretary, Transbay Joint Powers Authority



TRANSBAY JOINT POWERS AUTHORITY  
Adam Van de Water • Executive Director

### APPLICATION FOR MEMBERSHIP ON THE TJPA CITIZENS ADVISORY COMMITTEE

**Natasha Paterson**

Name: \_\_\_\_\_  
(Please type or write legibly)

Home Address: \_\_\_\_\_

City: San Francisco County: San Francisco Zip Code: 94105

Email: \_\_\_\_\_ Home Phone: \_\_\_\_\_

Contact Phone: \_\_\_\_\_ Occupation: Strategy Consultant

Employer: EY- Parthenon Position: Director

Ethnicity: \_\_\_\_\_ Gender: \_\_\_\_\_  
(Voluntary Information) (Voluntary Information)

**Affiliation(s)** Please check at least one.  
**Membership requires that you fit within one of the categories below.**

- Daily Caltrain rider into San Francisco
- Daily AC Transit Transbay Rider into San Francisco
- Daily MUNI Rider on a line that serves the Transit Center
- Local Resident from District 6 (zip code 94105 or 94107)
- Local Business from District 6 (zip code 94105 or 94107)
- Environmentalist
- Member of a planning or good-government non-profit organization
- Representative from labor
- Bicycle advocate
- Disabled advocate
- San Francisco based public transit advocate
- Regional Transit advocate
- Member of the citywide (San Francisco) business community
- Member with expertise in real estate development or real estate finance

**Please explain your qualifications with respect to the affiliation(s) you checked above.**

I am legally blind, live adjacent to the Transbay Terminal and commute to work (in the district) by walking through either the Salesforce Park or the third level of the Transit Center. I have been a strong advocate for myself with TJPA as a disabled person and look forward to expanding that advocacy to help others. I also bring a strong understanding of business and corporate governance.

**Applicants who currently sit on another regional CAC that advises on matters relevant to the Transit Center will have priority for membership on the TJPA CAC.**

Check here if you are a member of another regional Citizens Advisory Committee.

List CAC \_\_\_\_\_ Member since \_\_\_\_\_  
#2 \_\_\_\_\_ Member since \_\_\_\_\_  
#3 \_\_\_\_\_ Member since \_\_\_\_\_

**Summary of Applicant's Qualifications for Membership** (You may attach a resume. Please limit your attachment to no more than three pages):

See attached resume.

---

---

---

**Statement of Applicant's Objectives/Goals** if accepted for membership on the TJPA Citizens Advisory Committee:

Be an advocate for people of all levels of ability so they can enjoy the amenities of the Transit Center and Rooftop Park, and can easily access public transit.

---

**References**

	Name	E-mail	Phone
1.	Lauren Tanny	[REDACTED]	[REDACTED]
2.	Bryan Hair-Palmer	[REDACTED]	[REDACTED]

Applications are considered active for one year from the date of signature. Completed applications should be submitted to the Transbay Joint Powers Authority via email [cac@tjpa.org](mailto:cac@tjpa.org) or by mail to 425 Mission Street, Suite 250, San Francisco, CA 94105 by February 25, 2022.

Please note that the information you provide in this application, and resumes and other material provided in connection with it, may be made available to the public. If you do not want your home address, telephone number, email address, or fax number disclosed, please indicate that fact in the space below the signature line. The information will be redacted from publicly available copies. Where residence is relevant, a portion of the address (such as street name and zip code) may be disclosed.

Natasha Paterson  
SIGNATURE

4/19/22  
DATE

**How did you hear about us?**

- TJPA Website/Search Engine (Google, Yahoo, etc.)
- Email
- Newspaper
- Word of Mouth
- Social Media
- Other Invited to apply by TJPA executive

# NATASHA PATERSON

San Francisco, California

|Natasha.paterson|

Experienced investment analyst, researcher and economic consultant with broad industry focus, including technology, healthcare, energy and natural resources, utilities, financial services, and consumer retail. Passionate about leading, mentoring, and empowering teams to deliver insights to clients and managers. Reputation for building diverse networks and managing relationships with internal and external stakeholders and partners.

## EXPERIENCE

### **EY-PARTHENON**

*Director, Strategy and Transactions*

San Francisco, California

*2022 – present*

Managing teams to conduct commercial due diligence of technology companies for private equity clients.

### **CORNERSTONE RESEARCH**

*Associate*

San Francisco, California

*2016-2020*

Consulting firm supporting testifying experts with economic and financial analysis for all phases of commercial litigation and regulatory proceedings

- Managed teams and provided thought leadership in more than 15 engagements across practice areas including Antitrust, Consumer Fraud and Product Liability, Corporate Governance, Financial Institutions, Intellectual Property, International Arbitration, and Securities
- Collaborated with a leading global energy expert as part of an international arbitration involving a global energy company and a Middle Eastern utility to determine the competitive price of natural gas for an \$18b project
- Provided detailed analyses to the United States Department of Justice Antitrust Division on merger synergies for a proposed \$48b healthcare merger between two of the United States' largest healthcare insurers
- Supported a Harvard Business School professor in a matter involving \$165m in potential damages attributed to the alleged failure to disclose material information to the market by the management of a \$5b biotech company
- Led survey design to assess consumers' behavior and expectations related to data privacy for a \$1b litigation involving alleged consumer data privacy law violations

### **FIDELITY INTERNATIONAL**

*Equity Research Summer Analyst*

Sydney, Australia

*2015*

Global investment manager with over \$700 billion in assets under management, providing comprehensive investment solutions to institutions and individuals

- Presented a deep-dive industry review of the Australian consumer brands sector to Fidelity's global investment team, including comprehensive analysis of industry specific metrics and trends
- Launched coverage of six stocks after conducting primary research, including interviewing top management and industry experts, surveying end consumers and performing extensive modelling;

- recommended BUY ratings on three stocks to portfolio managers
- Created a framework for investing in consumer brands companies using industry-wide analysis of stock performance, incremental margins, returns, and correlation

**THE VICTORIAN FUNDS MANAGEMENT CORPORATION**  
*Equities Analyst*

Melbourne, Australia  
 2011 – 2013

Institutional investment manager with over \$45 billion in assets under management, providing comprehensive investment management services to state pension funds, insurance entities and endowments.

- Produced and presented investment recommendations and supporting analysis, covering gold mining, basic materials, utilities, and oil and gas sectors for the state of Victoria's investment management corporation with \$43b in AUM
- Developed and maintained strong relationships with company executives and industry analysts; represented VFMC at conferences, investor tours, and management presentations
- Built flexible and detailed valuation model for the gold mining sector, used across numerous peer group companies, improving direct investment decisions (\$50m investment)
- As lead analyst for energy and utilities, became subject matter expert on the utilities' regulatory framework, electricity generation and distribution, and gas and electricity energy markets (\$40m investment)

**EDUCATION**

**THE UNIVERSITY OF CHICAGO BOOTH SCHOOL OF BUSINESS**  
*Master of Business Administration,*  
*Concentrations in Analytic Finance, Economics, and Entrepreneurship*

Chicago, IL  
 2014 – 2016

- Selected as Portfolio Manager of Student Managed Investment Fund (\$1.75m AUM)
- Co-chair of Investment Management Group; active member of CREDIT, Hedge Fund, and Epicurean Groups
- Elected by peers to represent cohort in alumni-judged Leadership Challenge case competition

**YALE UNIVERSITY**  
*Bachelor of Arts in Economics (GPA: 3.40; Distinction in Economics)*

New Haven, CT  
 2006 – 2010

- Among eight prize finalists, of 169 seniors, for senior thesis on the impact of temperature change on GDP
- Board Member and Treasurer of the Yale Club of Australia (Jan – Jul 2014)

**ADDITIONAL**

- United States Permanent Resident
- Selected as part of 20-student Chicago Booth delegation to meet Warren Buffet in person in Omaha (Feb 2015)
- Enjoy traveling and adventure sports, including volcano sledding in Nicaragua and zip lining in Antigua