



THE CITY OF SAN DIEGO

City of San Diego – Audit Committee

Candidate for Public Audit Committee Member Appointment

Candidate Summary Application Form

Applicant's Name: Karley Schreiner Business Affiliation: None

PLEASE BRIEFLY PROVIDE THE INFORMATION REQUESTED BELOW:

Educational Background:

Bachelor of Science with an emphasis in Accounting from San Diego State University in 1989

Audit Related Experience:

Twenty years experience as a Senior Audit Manager with KPMG LLP. I have audited public and private companies in numerous industries under GAAP and IFRS.

Professional Credentials: (CPA, CIA, or other financial or legal)

California licensed CPA (active license #63371) since 1993

Professional Audit or Financial Organization Memberships:

American Institute of Certified Public Accountants (AICPA)

Experience or Special Knowledge Pertaining to Audit-Related Matters:

Experience with SEC and PCAOB standards, internal control review assessments under Sarbanes-Oxley 404, bank and insurance regulatory reviews/compliance.

Civic or Community Experience (Committees, Boards, Commissions, etc.)

California PTA since 2006 (member 0007348)
CONNECT Executive Springboard Committee (2008 - 2010).

Karley Schreiner Chubb
Applicant Signature

3/23/2012
Date

PLEASE FEEL FREE TO PROVIDE ADDITIONAL INFORMATION OR LETTERS OF ENDORSEMENT.
THANK YOU FOR YOUR INTEREST IN SERVING OUR CITY GOVERNMENT.

To submit your application, please complete and transmit 1) this Summary Application form, 2) the expanded Application form beginning on the next page and 3) a copy of your resume to:

The Office of the Independent Budget Analyst, Attn: Jeff Kowar
202 C Street, MS-3A San Diego, CA 92101

If submitted by e-mail: e-mail to sdiba@sandiego.gov

If submitted by fax: fax to (619) 236-6556

D. Employer Type of Business

Title / Position Duties

Address

()
Phone From Date To Date

11. Educational History:

High School / College / University / Other City / State Degree Major
(include full name)

San Diego State University San Diego, CA BS Accounting

12. Please list professional licenses and certificates that you have received and the dates that they were issued.

A). California CPA (#63371), 1993 B). _____
 C). _____ D). _____

13. Please list honors and awards that you have received.

A). KPMG National Instructor of the Year '99 B). _____
 C). KPMG Exceptional Mentor Award 2010 D). _____

14. Please list all organizations and societies that you have been a member of during the last 10 years.

<u>Entity</u>	<u>Position</u>	<u>From / To</u>
California PTA	member	2006 - present
CONNECT Executive Springboard	member	2008-2010

15. Please list all volunteer work that you have performed over the last 10 years that is relevant to this position :

none

Organization	City	/ State	Type	of Work
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Organization	City	/ State	Type	of Work
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Organization	City	/ State	Type	of Work
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16. Many positions require the appointment of people with special background, experience, or expertise. Please mark the categories for which you qualify.

- | | | |
|---|--|--|
| <input type="checkbox"/> Information Technology | <input type="checkbox"/> Agriculture | <input type="checkbox"/> Attorney |
| <input type="checkbox"/> Architecture | <input type="checkbox"/> Construction Industry | <input type="checkbox"/> Arts |
| <input type="checkbox"/> Engineering (_____) | <input type="checkbox"/> Environment Services | <input type="checkbox"/> Financial Institution |
| <input type="checkbox"/> Health Care (_____) | <input type="checkbox"/> Higher Education | <input type="checkbox"/> Insurance |
| <input type="checkbox"/> International Affairs | <input type="checkbox"/> Labor | <input type="checkbox"/> Law Enforcement |
| <input type="checkbox"/> Small Business | <input type="checkbox"/> Tourism | <input type="checkbox"/> Military Service |
| <input type="checkbox"/> Land Developer | <input checked="" type="checkbox"/> Other Accounting | |

17. If you served in the military, were you honorably discharged? (Please give date.) Yes ___ No ___

If no, please explain: _____

18. YES NO Do you currently or have you ever served in any elected or appointed office or on any local, state, or federal government board, commission, or committee?

Entity	Position	Dates
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Entity	Position	Dates
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Entity	Position	Dates
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Entity	Position	Dates
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19. YES NO
 To the best of your knowledge, do you have a spouse, registered domestic partner, or other relative who is currently an employee or appointee of the City of San Diego? If yes, please explain.
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-
20. YES NO
 To the best of your knowledge, have you ever been affiliated (*as a director, officer, partner, trustee, employee, owner, advisor, or consultant*) with any institution, organization, or business entity that might present a potential conflict of interest or the appearance of a conflict of interest with your requested appointment? If yes, please explain.
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-
21. YES NO
 To the best of your knowledge, do you have financial holdings in or receive income from any source or own real property or personal property that might present a potential conflict of interest or the appearance of a conflict of interest with your requested appointment? If yes, please explain.
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-
22. YES NO
municipal Have you ever been convicted of a violation of any federal, state, county, or law, regulation, or ordinance (*including driving under the influence of alcohol or drugs, reckless driving, or hit and run accidents*)? If yes, please explain.
-
-
23. YES NO
 To the best of your knowledge, are you currently under federal, state, or local investigation for possible violation of a criminal law or an ordinance? If yes, please explain.
-
-
24. YES NO
 Has a tax lien or other collection procedure ever been instituted against you by federal, state, or local authorities? If yes, please explain.
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25. YES NO
 Have you ever been disciplined or cited for a breach of ethics or unprofessional conduct or been the subject of a complaint to any court, administrative agency, professional association, disciplinary committee, or other professional group? If yes, please explain.

26. YES NO
 In the last 10 years, have you been a party to any civil litigation or administrative proceeding as either a plaintiff, defendant, petitioner, respondent? If yes, please explain.

27. YES NO
 Have you ever authored and published any books or articles? If yes, please explain.

28. YES NO
 Is there anything in your background that, if made known to the general public through your appointment, would cause embarrassment to you and/or to the City? If yes, please explain.

29. YES NO
 Are you able, with reasonable accommodation if needed, to perform the essential functions of the position for which you are applying?

ADDITIONAL INFORMATION

All my responses and attachments to this application are full, true, and correct to the best of my knowledge. The City may thoroughly investigate my background, including my educational record, employment history, personal references, and any military or criminal records and may make any other inquiries that are necessary in considering my application.

I understand that the City will retain the confidentiality of the information provided in connection with my application. In addition, absent my consent, this information will not be available under a public records act request. I may elect to withdraw from the appointment process at any time. Upon notification of my withdrawal, the City shall seal the record of my application but shall retain the information as confidential, not subject to a public records act request, for a period of at least 2 years.

I understand that if I knowingly make false statements on this application or omit material information, I might be disqualified from consideration.

I authorize any business, institution, or organization to release any records sought by the City in connection with my application. I release the City, its officers, agents, and employees and all individuals, organizations, educational institutions, and employers from all liability in responding to or providing writings connected with my application.

Karley Scherer Chess

Applicant Signature

3/23/2012

Date

Thank you for your interest in serving the City of San Diego.

(3-1-06)

Karley Schreiner

Home: [REDACTED]

PROFESSIONAL EXPERIENCE

RPR Partners, LLP
Chief Operations Officer

San Diego, CA
January – October 2011

- Developed and implemented Firm policies for Tax, Accounting and Administrative departments
- Oversaw the development of the Firm's annual budget and three-year strategic plan
- Supervised the preparation and interpretation of the Firm's bi-monthly financial data and reports
- Directed and supervised an Accounting Department of 5 professionals, including all billing and collection efforts
- Created client assignment schedule and workloads for 20 Tax Department professionals (40,000 hours)
- Monitored bi-monthly utilization and workflow for approximately 2,500 annual tax returns
- Directed and supervised an Administrative Department of 7 personnel for assignment of routine and non-routine work, overtime management and busy season coverage
- Managed the Peer Review process performed by the California Board of Accountancy
- Prepared a three-year information technology budget and cost-benefit analysis for moving the Firm to the Citrix cloud computing environment
- Analyzed the Firm's medical and dental insurance policies for cost-saving opportunities and reasonable benefit coverage for personnel and their families resulting in a 30% cost savings for the Firm
- Obtained multiple bids for new professional liability insurance policy and proposed recommendation of preferred service provider
- Directed and supervised human resource and personnel matters including hiring 9 individuals, the semi-annual evaluation process for 32 personnel, and the discipline and discharge of 2 personnel
- Primary point of contact for a Human Resource investigation and lawsuit
- Responsible for Firm 401K annual reporting on Form 5500
- Analyzed the professional qualifications and internal controls of the Firm's new third-party payroll servicer and implemented proper user control considerations

KPMG LLP
Senior Manager, Assurance

San Diego, CA
September 1990 – July 2010

Accounting and Auditing Skills

- Extensive background with SEC and PCAOB reporting issues gained through lead audit manager responsibilities on multiple public company audit clients in Southern California in the financial services and consumer markets industries
- International Financial Reporting Experience in both multi-location and stand alone audits, including IFRS conversion from GAAP and reporting under International Auditing Standards
- Evaluation of Sarbanes-Oxley Section 404 internal controls over financial reporting
- Due diligence projects for mergers and acquisitions
- Carve-out audits and purchase accounting
- Initial and secondary public debt and equity offerings, including Comfort Letters
- Agreed-upon procedures attestation engagements, including debt compliance
- No comments received from the PCAOB upon completion of a client engagement review
- Experience with Statutory Accounting Principles of the insurance industry established by the National Association of Insurance Commissioners ("stat" reporting)
- Analysis of bank regulatory compliance matters

Management Skills

- Resource Manager for the San Diego office's audit practice (2004-2008) – oversaw the assignment of all audit staff on client engagements (up to 65 professionals and 140,000 hours), provided monthly reporting of staff utilization to area leadership, projected headcount needs, ensured adequate staffing of out-of-town projects, monitored CPA status and training assignments and assisted with the local office's budgeting process
- Primary point of contact with client senior management including CEOs, CFOs, CIOs and Controllers
- Responsible for presenting audit findings to the Audit Committees of Boards of Directors
- Negotiation of annual audit fees and incremental billings for additional professional services provided
- Managed multiple audit engagements simultaneously, directing and supervising engagement teams ranging in size from 5 to 25 professionals across multiple professional disciplines
- Consistent exceptional upward feedback scores from audit and administrative staff under supervision

Leadership Skills & Awards

- Primary Campus Recruiter for the San Diego audit practice for five years, responsible for the hiring of over 60 audit staff positions and managing the annual college internship program
- Experienced Hire Recruiter responsible for assessing candidates' technical skill set for manager and senior auditor positions
- Western Area People Management Leader providing coaching and feedback to assigned professionals
- Exceptional Mentor Award, January 2010 San Diego office
- Selected as Team Member for the Firm's national Quality Peer Review Program
- National Instructor for Firm methodology and technical topic training programs (1994-2004)
- 1999 National Instructor of the Year Award
- Business Measurement Process Champion, leading the Firm's line of business strategy initiative (1995-1997)

Representative Industry Experience

- Consumer markets clients in the food and beverage industry, both private and public - Jenny Craig, Inc., Rubio's Restaurants, Inc. and Fili Enterprises (aka Daphne's Greek Café)
- Investment company clients - Forward Ventures, Castle Creek Capital, Dunham & Associates, Danielson Trust Company and North American Trust
- Insurance company clients - Insurance Company of the West, Explorer Insurance Company, Independence Casualty & Surety Company, Stewart Title of California, Union Benefit Life Insurance and the captive insurance companies of Security Pacific Bank
- Finance company clients - PeopleFirst.com, Goal Financial (aka Student Loan Consolidation Company) and AmRes (mortgage REIT)
- Financial Institution clients - PacWest Bancorp, Bank of Orange County, First National Bank, Valle de Oro Bank, Wells Fargo (mortgage servicing center), Security Pacific Bank and Glendale Federal Bank

EDUCATION, PROFESSIONAL CERTIFICATIONS AND OTHER ACTIVITIES

San Diego State University
Bachelor of Science, Business Administration with an emphasis in Accounting

San Diego, CA
 December 1989

Certified Public Accountant, active status (California license #63371)

Member of the American Institute of Certified Public Accountants

CONNECT Springboard Executive Committee

CONNECT FrameWorks workshop presenter for start-up companies