



Western Riverside Council of Governments Administration & Finance Committee

AGENDA

**Wednesday, December 14, 2022
12:00 PM**

**Western Riverside Council of Governments
3390 University Avenue, Suite 200
Riverside, CA 92501**

[Join Zoom Meeting](#)

Meeting ID: 890 1425 1277

Password: 664505

Dial in: (669) 900 9128 U.S.

SPECIAL NOTICE – COVID-19 RELATED PROCEDURES IN EFFECT

Due to the State or local recommendations for social distancing resulting from the threat of Novel Coronavirus (COVID-19), this meeting is being held via Zoom under Assembly Bill (AB) 361 (Government Code Section 54953). Pursuant to AB 361, WRCOG does not need to make a physical location available for members of the public to observe a public meeting and offer public comment. AB 361 allows WRCOG to hold Committee meetings via teleconferencing or other electronic means and allows for members of the public to observe and address the committee telephonically or electronically.

In addition to commenting at the Committee meeting, members of the public may also submit written comments before or during the meeting, prior to the close of public comment to jleonard@wrcog.us.

Any member of the public requiring a reasonable accommodation to participate in this meeting in light of this announcement shall contact Janis Leonard 72 hours prior to the meeting at (951) 405-6702 or jleonard@wrcog.us. Later requests accommodated to the extent feasible.

The Committee may take any action on any item listed on the agenda, regardless of the Requested Action.

- 1. CALL TO ORDER (Crystal Ruiz, Chair)**
- 2. PLEDGE OF ALLEGIANCE**
- 3. ROLL CALL**

4. PUBLIC COMMENTS

At this time members of the public can address the Committee regarding any items within the subject matter jurisdiction of the Committee that are not separately listed on this agenda. Members of the public will have an opportunity to speak on agenda items at the time the item is called for discussion. No action may be taken on items not listed on the agenda unless authorized by law. Whenever possible, lengthy testimony should be presented to the Committee in writing and only pertinent points presented orally.

5. CONSENT CALENDAR

All items listed under the Consent Calendar are considered to be routine and may be enacted by one motion. Prior to the motion to consider any action by the Committee, any public comments on any of the Consent Items will be heard. There will be no separate action unless members of the Committee request specific items be removed from the Consent Calendar.

A. Summary Minutes from the November 9, 2022, Administration & Finance Committee Meeting

Requested Action(s): 1. Approve the Summary Minutes from the November 9, 2022, Administration & Finance Committee meeting.

B. Finance Department Activities Update

Requested Action(s): 1. Receive and file.

C. Approval of Administration & Finance Committee Meeting Schedule for 2023

Requested Action(s): 1. Approve the schedule of Administration & Finance Committee meetings for 2023.

D. Commercial PACE Activities Update - Limited Appointment of Program Administrative Responsibilities to Nuveen Green Capital

Requested Action(s): 1. Recommend that the Executive Committee adopt Resolution Number 26-22; A Resolution of the Executive Committee of the Western Riverside Council of Governments authorizing and appointing Greenworks Lending, LLC, as Program Administrator in connection with the Temecula Senior Living Center, LLC, Commercial PACE Assessment Lien and documents related thereto and approving other actions in connection thereto.

6. REPORTS / DISCUSSION

Members of the public will have an opportunity to speak on agenda items at the time the item is called for discussion.

A. 2023 General Assembly Speaker

Requested Action(s): 1. Receive and file.

B. 2022 Fee Comparison Analysis Update

Requested Action(s): 1. Receive and file.

7. REPORT FROM THE EXECUTIVE COMMITTEE CHAIR

Crystal Ruiz, City of San Jacinto

8. REPORT FROM THE EXECUTIVE DIRECTOR

Dr. Kurt Wilson

9. ITEMS FOR FUTURE AGENDAS

Members are invited to suggest additional items to be brought forward for discussion at future Committee meetings.

10. GENERAL ANNOUNCEMENTS

Members are invited to announce items / activities which may be of general interest to the Committee.

11. NEXT MEETING

The next Administration & Finance Committee meeting is scheduled for Wednesday, February 8, 2023, at 12:00 p.m., on the Zoom platform with the option for Committee members to attend in-person.

12. ADJOURNMENT

Administration & Finance Committee

Minutes

1. CALL TO ORDER

The meeting of the WRCOG Administration & Finance Committee was called to order by Chair Crystal Ruiz at 12:00 p.m., on November 9, 2022, in WRCOG's office and on the Zoom platform.

2. PLEDGE OF ALLEGIANCE

Committee member Chris Barajas led members and guests in the Pledge of Allegiance.

3. ROLL CALL

- City of Jurupa Valley - Chris Barajas
- City of Lake Elsinore - Brian Tisdale
- City of Perris - Rita Rogers
- City of San Jacinto - Crystal Ruiz (Chair)
- City of Wildomar - Ben Benoit
- County of Riverside, District 2 - Karen Spiegel
- County of Riverside, District 3 - Chuck Washington
- Western Municipal Water District - Brenda Dennstedt*

*Arrived after Roll Call

4. PUBLIC COMMENTS

There were no public comments.

5. CONSENT CALENDAR – (Jurupa Valley / Wildomar) 7 yes; 0 no; 0 abstention. Items 5.A through 5.D were approved.

A. Summary Minutes from the October 12, 2022, Administration & Finance Committee Meeting

Action:

1. Approved the Summary Minutes from the October 12, 2022, Administration & Finance Committee meeting.

B. I-REN Program Status and Quarterly Update

Action:

1. Received and filed.

C. Finance Department Activities Update

Action:

1. Received and filed.

D. Approval of a Professional Services Agreement with Riverside County Flood Control and Water Conservation District for the Pollution Prevention Initiative

Action:

1. Authorized the Executive Director to execute a Professional Services Agreement, substantially as to form, with the Riverside County Flood Control and Water Conservation District.

6. REPORTS / DISCUSSION

A. Western Riverside County Clean Cities Coalition Activities

Taylor York, WRCOG Program Manager, reported that the National Clean Cities Coalition Network consists of more than 85 coalitions, and is a grassroots forum for local stakeholders to connect and collaborate on new transportation technologies and infrastructure development.

WRCOG Coalition staff recently hosted the annual SoCal AltCar conference in-person on October 27, 2022, at the Moreno Valley Conference and Recreation Center. The event was well attended and included information on the \$384M National Electric Vehicle Infrastructure Funding Plan for California, as well as updates from various regional agencies.

WRCOG recently conducted a Community Transportation Needs Assessment in focused areas of the subregion, e.g., disadvantaged and disproportionately burdened census tracts. The goal was to understand mobility challenges and identify strategies to address them with clean fuel vehicles. Completion of this assessment leads to eligibility for up to \$1M in funding to deploy solutions.

WRCOG Coalition staff recently participated in the Clean Cities Energy and Environmental Justice (EEJ) training, expanding staff's knowledge and resources for engaging communities that are disadvantaged and disproportionately burdened by poor air quality. Participation in this funding ensures that the Coalition is eligible to apply for significant future EEJ-related funding.

The \$5B National Electric Vehicle Infrastructure Funding Program is a federal funding program that provides money to states for deployment of electric vehicle charging infrastructure. California's share is \$384M, and the money goes directly to installers and network providers over a 2-year funding period. Funding is focused on highway corridors; there are four within Western Riverside County. Funding solicitations are expected in the first quarter of 2023, and Coalition staff are working to identify opportunities to partner with members to bring funding to the subregion.

On September 28, 2022, WRCOG's Coalition participated in its periodic redesignation process with the DOE. Redesignation allows the Coalition to demonstrate that it is active, viable, and committed to the Clean Cities mission. The Coalition was encouraged to build logistics and heavy duty partnerships, and was redesignated for another four years.

Actions:

1. Received and filed.

B. Western Riverside County Energy Resilience Plan

Daniel Soltero, WRCOG Program Manager, reported that the Western Riverside County Energy Resilience Plan was developed as a framework for WRCOG and its members to rank and prioritize their local government agencies for energy resilience upgrades. Microgrid case studies and conceptual designs were completed for two Jurupa Valley Fire Stations, a Banning Wastewater Treatment Plant, a Menifee Senior Center, and a Western Municipal Water District pump station.

The planning process involved identifying hazards and literature review, defining goals and objectives, determining asset prioritization, preparing a strategy assessment, and developing a draft framework and plan. Prioritizing factors included a facility overview, social vulnerability, hazard sensitivity, critical energy needs, availability requirements, and existing infrastructure.

The case studies found that a microgrid is feasible at the fire stations, senior center, and wastewater treatment plant by utilizing a combination of solar photovoltaics, a generator, and battery energy storage to maintain power during a power outage. The resilience study at the WMWD pump station found that the existing water pumps driven by natural gas electric have enough capacity to run only gas pumps during an electric outage, or run only electric pumps during a gas supply interruption, and a backup generator to ensure reliability.

Staff have been tracking grants that could fund potential next steps such as additional design work to further design and develop the feasibility studies to “shovel ready” projects, and/or to fund additional microgrid feasibility studies and conceptual designs for the remaining facilities in the prioritization matrix.

Actions:

1. Recommended that the Executive Committee approve the final version of the Western Riverside County Energy Resilience Plan.
2. Recommend that the Executive Committee direct staff to pursue funding opportunities to advance the identified projects further along in the design process.

(District 3 / Wildomar) 8 yes; 0 no; 0 abstention. Item 6.B was approved.

C. Grant Writing Assistance Program Activities Update

Christopher Tzeng, WRCOG Program Manager, reported that WRCOG commenced its Grant Writing Assistance Program in 2017 to strengthen the subregion’s overall competitiveness for grant funding and to provide needed supplemental support to member agencies which have been unable to seek grant funds due to limited staffing capacity and/or resources. The Program provides advisory services to WRCOG member agencies, technical assistance with grant application development on eligible grant programs, advisory services, bi-weekly grant opportunities tables, and grant program fact sheets.

The Program has provided assistance on grant application development on over 45 applications for the subregion with over 20 applications being awarded, totaling over \$70M in grant funding. This calendar year, WRCOG has provided assistance on Active Transportation Program grant application development for the Cities of Riverside and Temecula, and is currently assisting the City of San Jacinto with the development of an active transportation Highway Safety Improvement Plan grant application.

Upcoming categories of grant funding opportunities include broadband, electric vehicle charging stations, climate adaptation / resilience, and more funding for active transportation.

Action:

1. Received and filed.

D. 2022 / 2023 General Assembly Activities Updates and Determinations

Dr. Kurt Wilson, WRCOG Executive Director, reported that the 2022 event had approximately 650 attendees and generated \$310,000 in revenue against \$298,000 in costs. The 2023 event is tentatively scheduled for June 29, 2023, at the Pechanga Resort and Casino.

Committee members reviewed and discussed the list of available speakers.

Actions:

1. Directed the Executive Director to take the necessary actions for the 2023 General Assembly & Leadership Address to take place on June 29, 2023, at Pechanga Resort Casino, including entering into an agreement, substantially as to form.
2. Directed the Executive Director to find a speaker from the business / leadership sector, and cap the speaker contract at \$150,000.

(District 3 / District 2) 7 yes; 0 no; 0 abstention. Item 6.D was approved.

7. REPORT FROM THE COMMITTEE CHAIR

Chair Ruiz had no report.

8. REPORT FROM THE EXECUTIVE DIRECTOR

Dr. Kurt Wilson, WRCOG Executive Director, had no report.

9. ITEMS FOR FUTURE AGENDAS

Committee member Brenda Dennstedt asked for a presentation on the onboarding plan of new Executive Committee members, to possibly include mentoring.

10. GENERAL ANNOUNCEMENTS

Chair Ruiz wished everyone a Happy Thanksgiving.

Committee member Chuck Washington wished the Veteran's a Happy Veteran's Day.

11. NEXT MEETING

The next Administration & Finance Committee meeting is scheduled for Wednesday, December 14, 2022, at 12:00 p.m., on the Zoom platform with the option for Committee members to attend in person.

12. ADJOURNMENT

The meeting of the Administration & Finance Committee adjourned at 1:21 p.m.



Western Riverside Council of Governments Administration & Finance Committee

Staff Report

Subject: Finance Department Activities Update
Contact: Andrew Ruiz, Chief Financial Officer, aruiz@wrcog.us, (951) 405-6740
Date: December 14, 2022

Requested Action(s):

1. Receive and file.

Purpose:

The purpose of this item is to provide an update on the Agency financials through September 2022.

WRCOG 2022-2027 Strategic Plan Goal:

Goal #3 - Ensure fiscal solvency and stability of the Western Riverside Council of Governments.

Background:

On January 12, 2022, the Executive Committee adopted a new Strategic Plan with specific fiscal-related goals:

1. Maintain sound, responsible fiscal policies.
2. Develop a process to vet fiscal impact(s) and potential risk(s) for all new programs and projects.
3. Provide detailed financial statements for public review online.

Regarding goal #1, staff have planned out a process to go through and revise all of its fiscal-related policies and plan to have them vetted and revised by the end of the fiscal year. Staff will begin by updating its investment policy with the assistance of its financial advisor, Public Financial Management (PFM), and will seek input from the Finance Directors Committee at its next meeting.

Regarding goal #3, staff have updated the public financial statements with significantly more detail, including breaking out each line item by fund, department, and program. These detailed financial statements provide more transparency into each of the Agency's funds and programs.

As staff continue to work through these goals, input through WRCOG's Committee structure will be important to ensure the goals are being met.

Financial Report Summary Through September 2022

The Agency's Financial Report summary through September 2022, a detailed overview of WRCOG's financial statements in the form of combined Agency revenues and costs, plus a detailed breakout, is

provided as an attachment to this Staff Report.

Fiscal Year (FY) 2021/2022 Year End and Agency Audit

FY 2021/2022 has now ended and the Agency's books have now been closed. WRCOG will be utilizing the services of the audit firm Van Lant and Fankhanel (VLF) to conduct its financial audit. During FY 2021/2022, an RFP was released for financial auditing services as a Government Finance Officers Association (GFOA) best practice, as WRCOG has utilized auditing firm Rogers, Anderson, Malody and Scott for the past five years. WRCOG ended up selecting a new audit firm (VLF) to conduct its audits based on the results of the RFP.

In July 2022, VLF conducted the first phase of the audit, known as the interim audit, which involves preliminary audit work that is conducted prior to the books being fully closed. The interim audit tasks are conducted in order to gain an understanding of the Agency's processes during the year and to compress the period needed to complete the final audit after the books have been closed. The interim audit has now been completed and the full audit has started in October 2022 with expected completion by the end of November.

Prior Action(s):

November 17, 2022: The Finance Directors Committee received and filed.

Fiscal Impact:

Finance Department activities are included in the Agency's adopted Fiscal Year 2022/2023 Budget under the Administration Department under Fund 110.

Attachment(s):

[Attachment 1 - September 2022 Agency Financials](#)

Attachment

FY 2022/2023 1st Quarter
Agency Financials



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Description	Actual	FY 23 Budget	Variance
Revenues			
Member Dues	\$ 294,410	\$ 294,410	\$ -
Fellowship	-	100,000	(100,000)
Operating Transfer Out	443,120	2,476,847	2,033,727
Solid Waste - SB1383	117,593	117,593	-
PACE Revenue	6,375	-	(6,375)
Hero Admin Fees	183,300	2,725,000	2,541,700
WRCOG HERO CAFTA Revenue	-	150,000	150,000
PACE Commercial Sponsor Revenue	-	50,000	50,000
Regional Streetlights Revenue	43,276	135,542	92,266
Solid Waste	124,206	173,157	48,951
Used Oil Grants	198,398	198,398	-
Air Quality - Other Reimburse	126,000	270,167	144,167
IREN - Public Sector	173,185	10,038,349	9,865,164
REAP Revenue	151,479	1,050,000	898,521
LTF Revenue	70,000	70,000	-
Operations and Maintenance	-	-	-
LTF Revenue	1,002,500	930,000	(72,500)
Other Misc Revenue-RIVTAM	7,000	25,000	18,000
Commerical/Service	324,767	1,560,000	1,235,233
Retail	464,807	4,160,000	3,695,193
Industrial	6,369,701	8,320,000	1,950,299
Residential/Multi/Single	12,463,156	36,400,000	23,936,844
Multi-Family	3,854,841	4,680,000	825,159
Beaumont TUMF Settlement Revenue	1,500,000	900,000	(600,000)
Interest Revenue - Other	16,946	5,000	(11,946)
Citizens Trust Investment Interest	-	275,000	275,000
Total Revenues	\$ 27,935,061	\$ 75,104,463	\$ 46,969,402
Expenses			
Salaries & Wages - Fulltime	\$ 556,169	\$ 3,064,926	\$ 2,508,756
Fringe Benefits	654,865	1,399,419	744,555
Overhead Allocation	443,120	2,174,586	1,731,466
General Legal Services	500,051	1,551,600	639,717
Audit Svcs - Professional Fees	-	30,000	30,000
Bank Fees	-	67,008	67,008
Commissioners Per Diem	17,100	72,000	54,900
Parking Cost	7,241	28,000	20,759
Office Lease	87,702	340,000	252,298
WRCOG Auto Fuels Expenses	41	1,000	959
WRCOG Auto Maintenance Expense	-	500	500
Parking Validations	711	14,100	13,390
Staff Recognition	1,660	3,100	1,440
Coffee and Supplies	97	2,500	2,403
Event Support	46,010	165,000	118,990
Program/Office Supplies	5,429	22,800	17,371
Computer Equipment/Supplies	-	7,000	7,000
Computer Software	20,907	104,500	83,593
Rent/Lease Equipment	2,534	15,000	12,466
Membership Dues	9,561	59,250	49,689
Subscription/Publications	8,780	8,950	170
Meeting Support Services	96	3,350	3,254



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Description	Actual	FY 23 Budget	Variance
Postage	773	8,250	7,477
Other Household Exp	784	2,600	1,816
Storage	1,299	5,500	4,201
Printing Services	1,324	4,650	3,326
Computer Hardware	60	9,000	8,940
Misc. Office Equipment	58	1,000	942
Communications - Regular Phone	5,535	17,500	11,965
Communications - Cellular Phones	2,046	16,900	14,854
Communications - Computer Services	5,372	40,000	34,628
Communications - Web Site	-	8,000	8,000
Equipment Maintenance - Comp/Software	-	7,500	7,500
Maintenance - Building and Improvement	5,353	12,000	6,647
Insurance - Errors & Omissions	-	50,000	50,000
Insurance - Gen/Busi Liab/Auto	7,001	54,266	47,265
WRCOG Auto Insurance	-	6,000	6,000
Data Processing Support	1,776	8,000	6,224
Recording Fee-PACE	1,331	14,000	12,669
Seminars/Conferences	158	24,850	24,692
Travel - Mileage Reimbursement	100	20,030	19,930
Travel - Ground Transportation	124	10,300	10,176
Travel - Airfare	-	36,750	36,750
Lodging	2,983	80,600	77,617
Meals	390	10,730	10,340
Other Incidentals	-	1,500	1,500
Training	120	33,250	33,130
OPEB Repayment	-	110,526	110,526
Supplies/Materials	-	8,900	8,900
Advertising Media - Newspaper Ad	29,000	29,048	48
Staff Education Reimbursement	-	7,500	7,500
Compliance Settlements	40,280	200,000	159,720
Direct Costs	-	1,660,177	1,660,177
Consulting Labor	391,226	8,018,122	7,626,896
TUMF Project Reimbursement	-	25,000,000	25,000,000
COG REN Reimbursement	-	1,474,000	1,474,000
Total Expenses	\$ 2,859,167	\$ 46,126,038	\$ 42,855,038



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
Administration								
Revenues								
110	12	40001	0	0	Member Dues	\$ 294,410	\$ 294,410	\$ -
110	12	49001	0	0	Interest Revenue - Other	16,946	5,000	(11,946)
110	12	97001	0	0	Operating Transfer Out	443,120	2,476,847	2,033,727
Total Revenues						\$ 754,476	\$ 2,776,257	\$ 2,021,780
Expenses								
110	12	60001	0	0	Salaries & Wages - Fulltime	\$ 185,707	\$ 944,788	\$ 759,081
110	12	61000	0	0	Fringe Benefits	324,496	449,211	124,715
110	12	65101	0	0	General Legal Services	19,313	115,000	95,687
110	12	65401	0	0	Audit Svcs - Professional Fees	-	30,000	30,000
110	12	65505	0	0	Bank Fees	-	2,000	2,000
110	12	65507	0	0	Commissioners Per Diem	17,100	70,000	52,900
110	12	71615	0	0	Parking Cost	7,241	28,000	20,759
110	12	73001	0	0	Office Lease	87,702	340,000	252,298
110	12	73003	0	0	WRCOG Auto Fuels Expenses	41	1,000	959
110	12	73004	0	0	WRCOG Auto Maintenance Expense	-	500	500
110	12	73102	0	0	Parking Validations	711	10,000	9,290
110	12	73104	0	0	Staff Recognition	1,160	3,100	1,940
110	12	73106	0	0	Coffee and Supplies	97	2,500	2,403
110	12	73107	0	0	Event Support	7,590	45,000	37,410
110	12	73108	0	0	Program/Office Supplies	5,429	20,000	14,571
110	12	73109	0	0	Computer Equipment/Supplies	-	5,500	5,500
110	12	73110	0	0	Computer Software	11,957	35,000	23,043
110	12	73111	0	0	Rent/Lease Equipment	2,534	15,000	12,466
110	12	73113	0	0	Membership Dues	8,061	30,000	21,939
110	12	73114	0	0	Subscription/Publications	8,764	6,000	(2,764)
110	12	73115	0	0	Meeting Support Services	80	500	420
110	12	73116	0	0	Postage	603	5,000	4,397
110	12	73117	0	0	Other Household Exp	784	1,500	716
110	12	73119	0	0	Storage	-	1,500	1,500
110	12	73120	0	0	Printing Services	1,324	1,000	(324)



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
110	12	73122	0	0	Computer Hardware	60	8,000	7,940
110	12	73201	0	0	Communications - Regular Phone	5,535	17,500	11,965
110	12	73204	0	0	Communications - Cellular Phones	802	7,500	6,698
110	12	73206	0	0	Communications - Computer Services	5,372	40,000	34,628
110	12	73209	0	0	Communications - Web Site	-	8,000	8,000
110	12	73302	0	0	Equipment Maintenance - Comp/Software	-	5,000	5,000
110	12	73303	0	0	Maintenance - Building and Improvement	5,353	12,000	6,647
110	12	73401	0	0	Insurance - Errors & Omissions	-	50,000	50,000
110	12	73405	0	0	Insurance - Gen/Busi Liab/Auto	7,001	50,266	43,265
110	12	73407	0	0	WRCOG Auto Insurance	-	6,000	6,000
110	12	73601	0	0	Seminars/Conferences	-	3,500	3,500
110	12	73611	0	0	Travel - Mileage Reimbursement	2	3,500	3,498
110	12	73612	0	0	Travel - Ground Transportation	-	1,500	1,500
110	12	73613	0	0	Travel - Airfare	-	3,000	3,000
110	12	73620	0	0	Lodging	-	1,500	1,500
110	12	73630	0	0	Meals	260	3,500	3,240
110	12	73650	0	0	Training	-	30,000	30,000
110	12	73660	0	0	OPEB Repayment	-	110,526	110,526
110	12	73801	0	0	Staff Education Reimbursement	-	7,500	7,500
110	12	85100	0	0	Direct Costs	-	160,177	160,177
110	12	85101	0	0	Consulting Labor	56,715	250,000	193,285
Total Expenses						\$ 863,943	\$ 2,941,068	\$ 2,077,125



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
Fellowship								
Revenues								
110	12	40009	4700	0	Fellowship	\$ -	\$ 100,000	\$ (100,000)
Total Revenues						\$ -	\$ 100,000	\$ (100,000)
Expenses								
110	12	60001	4700	0	Salaries & Wages - Fulltime	\$ 18,840	\$ 174,412	\$ 155,572
110	12	61000	4700	0	Fringe Benefits	1,723	15,660	13,937
110	12	65101	4700	0	General Legal Services	-	100	100
110	12	73102	4700	0	Parking Validations	-	1,000	1,000
110	12	73107	4700	0	Event Support	-	1,000	1,000
110	12	73108	4700	0	Program/Office Supplies	-	500	500
110	12	73115	4700	0	Meeting Support Services	-	250	250
110	12	73116	4700	0	Postage	-	100	100
110	12	73601	4700	0	Seminars/Conferences	-	150	150
110	12	73611	4700	0	Travel - Mileage Reimbursement	-	1,000	1,000
110	12	73612	4700	0	Travel - Ground Transportation	-	150	150
110	12	73630	4700	0	Meals	-	350	350
110	12	73650	4700	0	Training	-	250	250
110	12	85101	4700	0	Consulting Labor	-	500	500
Total Expenses						\$ 20,563	\$ 195,422	\$ 174,859



Western Riverside Council of Governments

Budget-to-Actuals

As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
TUMF Administration								
Revenues								
110	65	43001	1148	0	Commerical/Service	\$ 12,991	\$ 62,400	\$ 49,409
110	65	43002	1148	0	Retail	18,592	166,400	147,808
110	65	43003	1148	0	Industrial	254,788	332,800	78,012
110	65	43004	1148	0	Residential/Multi/Single	498,526	1,456,000	957,474
110	65	43005	1148	0	Multi-Family	154,194	187,200	33,006
110	65	43027	1148	0	Beaumont TUMF Settlement Revenue	-	36,000	36,000
Total Revenues						\$ 939,091	\$ 2,240,800	\$ 1,301,709
Expenses								
110	65	60001	1148	0	Salaries & Wages Fulltime	\$ 77,061	\$ 389,173	\$ 312,112
110	65	61000	1148	0	Fringe Benefits	24,707	177,218	152,511
110	65	63000	1148	0	Overhead Allocation	200,000	800,000	600,000
110	65	65101	1148	0	General Legal Services	12,669	75,000	62,331
110	65	65505	1148	0	Bank Fees	-	15,000	15,000
110	65	73102	1148	0	Parking Validations	-	500	500
110	65	73108	1148	0	General Supplies	-	500	500
110	65	73109	1148	0	Computer Supplies	-	500	500
110	65	73110	1148	0	Computer Software	8,950	65,000	56,050
110	65	73113	1148	0	Membership Dues	-	1,500	1,500
110	65	73114	1148	0	Subscriptions/Publications	16	100	84
110	65	73116	1148	0	POSTAGE	-	100	100
110	65	73117	1148	0	Other Household Expenses	-	100	100
110	65	73120	1148	0	Printing Services	-	150	150
110	65	73204	1148	0	Cellular Phone	507	3,000	2,493
110	65	73302	1148	0	Equipment Maintenance	-	2,500	2,500
110	65	73405	1148	0	Insurance - Gen/Busi Liab/Auto	-	3,000	3,000
110	65	73601	1148	0	Seminar/Conferences	-	1,500	1,500
110	65	73611	1148	0	Travel - Mileage Reimbursement	-	1,500	1,500
110	65	73612	1148	0	Travel - Ground Transportation	-	250	250



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
110	65	73613	1148	0	Travel-AirFare	-	750	750
110	65	73620	1148	0	Lodging	-	800	800
110	65	73630	1148	0	Meals	-	1,000	1,000
110	65	73640	1148	0	Other Incidentals	-	500	500
110	65	85101	1148	0	Outside Consultants	99,503	450,000	350,497
Total Expenses						\$ 423,413	\$ 1,989,641	\$ 1,566,228

TUMF

Revenues

220	65	43001	1148	0	Commercial/Svcs	\$311,776	\$1,497,600	\$1,185,824
220	65	43002	1148	0	Retail	\$446,215	\$3,993,600	\$3,547,385
220	65	43003	1148	0	Industrial	\$6,114,913	\$7,987,200	\$1,872,287
220	65	43004	1148	0	Residential/Multi/Single	\$11,964,630	\$34,944,000	\$22,979,370
220	65	43005	1148	0	Multi Family	\$3,700,647	\$4,492,800	\$792,153
220	65	43027	1148	0	Beaumont TUMF Settlement Revenue	\$1,500,000	\$864,000	(\$636,000)
220	65	49104	1148	0	Citizens Trust Investment Interest	\$0	\$275,000	\$275,000
Total Revenues						\$24,038,181	\$54,054,200	\$30,016,019

Expenses

220	65	65101	1148	3307	Beaumon Legal Svcs-URBAN LOGIC	\$ 287	\$ 287	\$ -
220	65	65101	1148	3310	General Legal Services	258,684	392,653	133,969
220	65	65101	1148	3311	General Legal Services	7,060	7,060	-
220	65	85160	1148	0	TUMF Project Reimbursement	-	25,000,000	25,000,000
Total Expenses						\$ 266,031	\$ 25,400,000	\$ 25,133,969



Western Riverside Council of Governments

Budget-to-Actuals

As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
Grant Writing								
Expenses								
110	65	85101	1300	0	Consulting Labor	\$ -	\$ 20,000	\$ 20,000
Total Expenses						\$ -	\$ 20,000	\$ 20,000
Local Transportation Fund								
Revenues								
210	65	41701	1400	0	LTF Revenue	\$ 1,002,500	\$ 930,000	\$ (72,500)
Total Revenues						\$ 1,002,500	\$ 930,000	\$ (72,500)
Expenses								
210	65	60001	1400	0	Salaries & Wages - Fulltime	\$ 45,012	\$ 346,880	\$ 301,868
210	65	61000	1400	0	Fringe Benefits	14,703	153,100	138,397
210	65	63000	1400	0	Overhead Allocation	45,000	180,000	135,000
210	65	65101	1400	0	General Legal Services	-	2,500	2,500
210	65	73102	1400	0	Parking Validations	-	500	500
210	65	73107	1400	0	Event Support	-	500	500
210	65	73108	1400	0	Program/Office Supplies	-	500	500
210	65	73110	1400	0	Computer Software	-	2,500	2,500
210	65	73113	1400	0	Membership Dues	1,500	750	(750)
210	65	73116	1400	0	Postage	-	500	500
210	65	73204	1400	0	Communications - Cellular Phones	-	100	100
210	65	73601	1400	0	Seminars/Conferences	-	3,500	3,500
210	65	73611	1400	0	Travel - Mileage Reimbursement	-	1,000	1,000
210	65	73612	1400	0	Travel - Ground Transportation	-	1,500	1,500
210	65	73613	1400	0	Travel - Airfare	-	750	750
210	65	73620	1400	0	Lodging	-	2,500	2,500
210	65	73630	1400	0	Meals	85	750	665
210	65	73703	1400	0	Supplies/Materials	-	1,000	1,000
210	65	85101	1400	0	Consulting Labor	40,581	250,000	209,419
Total Expenses						\$ 146,881	\$ 948,829	\$ 801,949



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
RIVTAM								
Revenues								
110	65	42001	2039	0	Other Misc Revenue-RIVTAM	\$ 7,000	\$ 25,000	\$ 18,000
Total Revenues						\$ 5,000	\$ 25,000	\$ (20,000)
Expenses								
110	65	60001	2039	0	Salaries & Wages - Fulltime	\$ 1,094	\$ 6,353	\$ 5,260
110	65	61000	2039	0	Fringe Benefits	331	3,504	3,173
110	65	85101	2039	0	Consulting Labor	-	15,000	15,000
Total Expenses						\$ 1,425	\$ 24,858	\$ 23,433
Regional Early Action Planning (REAP)								
Revenues								
110	65	41606	2235	0	REAP Revenue	\$ 151,479	\$ 1,050,000	\$ 898,521
Total Revenues						\$ 151,479	\$ 1,050,000	\$ 898,521
Expenses								
110	65	60001	2235	0	Salaries & Wages - Fulltime	\$ 16,767	\$ 79,264	\$ 62,496
110	65	61000	2235	0	Fringe Benefits	5,277	35,872	30,595
110	65	63000	2235	0	Overhead Allocation	17,673	125,383	107,710
110	65	65101	2235	6001	General Legal Services	1,251	-	(1,251)
110	65	85101	2235	0	Consulting Labor	110,511	809,101	698,590
Total Expenses						\$ 151,479	\$ 1,049,620	\$ 898,141



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
Clean Cities								
Revenues								
120	80	41402	1010	0	Air Quality - Other Reimburse	\$ 126,000	\$ 270,167	\$ 144,167
120	80	41701	1010	0	LTF Revenue	70,000	70,000	-
Total Revenues						\$ 196,000	\$ 340,167	\$ 144,167
Expenses								
120	80	60001	1010	0	Salaries & Wages - Fulltime	\$ 21,893	\$ 170,523	\$ 148,630
120	80	61000	1010	0	Fringe Benefits	6,803	86,260	79,457
120	80	63000	1010	0	Overhead Allocation	9,000	36,000	27,000
120	80	73107	1010	0	Event Support	-	10,000	10,000
120	80	73115	1010	0	Meeting Support Services	-	500	500
120	80	73116	1010	0	Postage	-	400	400
120	80	73116	1010	0	Communications - Cellular Phones	51	-	(51)
120	80	73611	1010	0	Travel - Mileage Reimbursement	26	500	474
120	80	73612	1010	0	Travel - Ground Transportation	52	250	198
120	80	73613	1010	100	Travel - Airfare	-	3,500	3,500
120	80	73620	1010	100	Lodging	842	3,500	2,658
120	80	73630	1010	0	Meals	-	500	500
120	80	73640	1010	0	Other Incidentals	-	500	500
120	80	73703	1010	0	Supplies/Materials	-	1,500	1,500
120	80	85101	1010	0	Consulting Labor	14,668	25,850	11,182
Total Expenses						\$ 53,334	\$ 339,783	\$ 286,449



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
Love Your Neighborhood								
Revenues								
110	80	41201	1035	0	Solid Waste	\$ -	\$ 50,000	\$ 50,000
Total Revenues						\$ -	\$ 50,000	\$ 50,000
Expenses								
110	80	73107	1035	0	Event Support	\$ -	\$ 10,000	\$ 10,000
110	80	85101	1035	0	Consulting Labor	-	40,000	40,000
Total Expenses						\$ -	\$ 50,000	\$ 50,000
Solid Waste								
Revenues								
110	80	40301	1038	0	Solid Waste - SB1383	\$ 117,593	\$ 117,593	\$ -
110	80	41201	1038	0	Solid Waste	124,206	123,157	(1,049)
Total Revenues						\$ 241,800	\$ 240,750	\$ (1,049)
Expenses								
110	80	60001	1038	0	Salaries	\$ 12,995	\$ 61,429	\$ 48,434
110	80	61000	1038	0	Fringe Benefits	3,933	31,224	27,291
110	80	63000	1038	0	Overhead Allocation	3,000	12,000	9,000
110	80	65101	1038	0	Legal	270	1,000	730
110	80	73102	1038	0	Parking Validations	-	500	500
110	80	73107	1038	0	Event Support	-	2,000	2,000
110	80	73114	1038	0	Subscriptions/Publications	-	250	250
110	80	73204	1038	0	Cell Phone Expense	175	500	325
110	80	73601	1038	0	Seminars/Conferences	-	500	500
110	80	73611	1038	0	Mileage Reimbursement	-	250	250
110	80	73612	1038	0	Ground Transportation	-	150	150
110	80	73613	1038	0	Airfare	-	250	250
110	80	73630	1038	0	Meals	-	500	500
110	80	73650	1038	0	Training	-	500	500
110	80	85101	1038	0	Consulting Labor	55,136	129,556	74,420
Total Expenses						\$ 75,509	\$ 240,609	\$ 165,100



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
Streetlights								
Revenues								
110	67	40615	2026	0	Regional Streetlights Revenue	\$ 43,276	\$ 135,542	\$ 92,266
Total Revenues						\$ 43,276	\$ 135,542	\$ 92,266
Expenses								
110	67	60001	2026	0	Salaries	\$ 12,768	\$ 63,779	\$ 51,011
110	67	61000	2026	0	Fringe Benefits	4,248	31,032	26,784
110	67	63000	2026	0	Overhead Allocation	3,000	12,000	9,000
110	67	65101	2026	0	Legal	237	750	513
110	67	65505	2026	0	Streetlights Bank Fees	-	508	508
110	67	73102	2026	0	Parking Validations	-	150	150
110	67	73104	2026	0	Staff Recognition	500	-	(500)
110	67	73107	2026	0	Event Support	-	1,000	1,000
110	67	73108	2026	0	Program/Office Supplies	-	500	500
110	67	73114	2026	0	Subscriptions/Publications	-	1,600	1,600
110	67	73115	2026	0	Meeting&Support	-	600	600
110	67	73116	2026	0	Postage	33	150	117
110	67	73204	2026	0	Communications - Cellular Phones	102	500	399
110	67	73601	2026	0	Seminars/Conferences	-	1,200	1,200
110	67	73611	2026	0	Travel - Mileage Reimbursement	72	250	178
110	67	73612	2026	0	Travel-Ground Transportation	72	500	428
110	67	73613	2026	0	Travel - Airfare	-	1,000	1,000
110	67	73620	2026	0	Lodging	364	800	436
110	67	73630	2026	0	Meals	32	250	218
110	67	73650	2026	0	Training	-	500	500
110	67	73703	2026	0	Supplies/Materials	-	2,900	2,900
110	67	85101	2026	0	Consulting Labor	-	15,433	15,433
Total Expenses						\$ 21,427	\$ 135,402	\$ 113,975



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
Inland Regional Energy Network								
Revenues						Actual	FY 23 Budget	Variance
180	67	41480	2080	71XX	IREN - Public Sector	\$ 92,806	\$ 6,239,958	\$ 6,147,152
180	67	41480	2080	72XX	IREN - Workforce Education and Training	41,069	2,323,361	2,282,292
180	67	41480	2080	73XX	IREN - Codes and Standards	39,310	1,475,030	1,435,720
Total Revenues						\$ 173,185	\$ 10,038,349	\$ 9,865,164
Expenses						Actual	FY 23 Budget	Variance
180	67	60001	2080	7101	Salaries & Wages - Fulltime	\$ 31,881	\$ 221,281	\$ 189,400
180	67	60001	2080	7201	Salaries & Wages - Fulltime	10,242	71,088	60,846
180	67	60001	2080	7301	Salaries & Wages - Fulltime	9,572	66,439	56,867
180	67	61000	2080	7101	Fringe Benefits	10,718	100,535	89,817
180	67	61000	2080	7201	Fringe Benefits	3,443	31,124	27,681
180	67	61000	2080	7301	Fringe Benefits	3,218	28,691	25,473
180	67	63000	2080	7101	Overhead Allocation	33,603	350,457	316,854
180	67	63000	2080	7201	Overhead Allocation	10,795	111,309	100,514
180	67	63000	2080	7301	Overhead Allocation	10,089	103,597	93,508
180	67	65101	2080	7101	General Legal Services	1,600	13,400	11,800
180	67	65101	2080	7111	General Legal Services	1,600	1,600	-
180	67	65101	2080	7201	General Legal Services	1,600	13,400	11,800
180	67	65101	2080	7211	General Legal Services	1,600	1,600	-
180	67	65101	2080	7301	General Legal Services	1,600	13,400	11,800
180	67	65101	2080	7311	General Legal Services	1,600	1,600	-
180	67	65505	2080	7101	Bank Fees	-	1,500	1,500
180	67	73102	2080	7101	Parking Validations	-	1,000	1,000
180	67	73107	2080	7103	Event Support	4,167	20,833	16,667
180	67	73107	2080	7113	Event Support	4,167	4,167	-
180	67	73107	2080	7203	Event Support	4,167	20,833	16,667
180	67	73107	2080	7213	Event Support	4,167	4,167	-
180	67	73107	2080	7303	Event Support	4,167	20,833	16,667
180	67	73107	2080	7313	Event Support	4,167	4,167	-
180	67	73113	2080	7101	Membership Dues	-	25,000	25,000
180	67	73117	2080	7101	Other Household Exp	-	1,000	1,000
180	67	73120	2080	7101	Printing Services	-	2,500	2,500



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
180	67	73122	2080	7101	Computer Hardware	-	1,000	1,000
180	67	73125	2080	7101	Misc. Office Equipment	58	1,000	942
180	67	73204	2080	7101	Communications - Cellular Phones	116	3,600	3,484
180	67	73601	2080	7203	Seminars/Conferences	79	9,921	9,842
180	67	73601	2080	7213	Seminars/Conferences	79	79	-
180	67	73611	2080	7101	Travel - Mileage Reimbursement	-	10,530	10,530
180	67	73612	2080	7101	Travel - Ground Transportation	-	5,000	5,000
180	67	73613	2080	7101	Travel - Airfare	-	25,000	25,000
180	67	73620	2080	7101	Lodging	148	69,259	69,111
180	67	73620	2080	7111	Lodging	148	148	-
180	67	73620	2080	7201	Lodging	148	148	-
180	67	73620	2080	7211	Lodging	148	148	-
180	67	73620	2080	7301	Lodging	148	148	-
180	67	73620	2080	7311	Lodging	148	148	-
180	67	73630	2080	7101	Meals	-	2,880	2,880
180	67	73703	2080	7101	Supplies/Materials	-	1,000	1,000
180	67	85100	2080	7101	Direct Costs	-	1,500,000	1,500,000
180	67	85101	2080	7101	Consulting Labor	2,056	2,937,874	2,935,819
180	67	85101	2080	7103	Consulting Labor	245	245	-
180	67	85101	2080	7111	Consulting Labor	2,056	2,056	-
180	67	85101	2080	7113	Consulting Labor	245	245	-
180	67	85101	2080	7201	Consulting Labor	2,056	1,726,119	1,724,064
180	67	85101	2080	7203	Consulting Labor	245	245	-
180	67	85101	2080	7211	Consulting Labor	2,056	2,056	-
180	67	85101	2080	7213	Consulting Labor	245	245	-
180	67	85101	2080	7301	Consulting Labor	2,056	1,017,167	1,015,112
180	67	85101	2080	7303	Consulting Labor	245	245	-
180	67	85101	2080	7311	Consulting Labor	2,056	2,056	-
180	67	85101	2080	7313	Consulting Labor	245	245	-
180	67	85182	2080	7101	COG REN Reimbursement	-	916,256	916,256
180	67	85182	2080	7201	COG REN Reimbursement	-	341,155	341,155
180	67	85182	2080	7301	COG REN Reimbursement	-	216,589	216,589
Total Expenses						\$ 173,185	\$ 10,028,330	\$ 9,855,145



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
PACE Funding								
Revenues								
110	67	40601	2104	0	PACE Revenue	\$ 6,375	\$ -	\$ (6,375)
Total Revenues						\$ 6,375	\$ -	\$ 6,375
Expenses								
110	67	73506	2104	0	Recording Fee-PACE	\$ 34	\$ -	\$ (34)
Total Expenses						\$ 34	\$ -	\$ (34)
Greenworks								
Revenues								
110	67	40604	2105	0	WRCOG HERO CAFTA Revenue	\$ -	\$ 150,000	\$ 150,000
Total Revenues						\$ -	\$ 150,000	\$ 150,000
Expenses								
110	67	60001	2105	0	Salaries & Wages -Greenworks Lending	\$ 12,039	\$ 58,176	\$ 46,137
110	67	61000	2105	0	Fringe Benefits	4,013	30,934	\$ 26,921
110	67	63000	2105	0	Overhead Allocation	6,000	24,000	\$ 18,000
110	67	73506	2105	0	Recording Fee	-	2,000	\$ 2,000
110	67	85101	2105	0	Consulting Labor	-	34,757	\$ 34,757
Total Expenses						\$ 22,052	\$ 149,866	\$ 127,814
Twain								
Revenues								
110	67	40607	2115	0	PACE Commercial Sponsor Revenue	\$ -	\$ 50,000	\$ 50,000
Total Revenues						\$ -	\$ 50,000	\$ 50,000
Expenses								
110	67	65101	2115	0	General Legal Services	\$ -	\$ 6,000	\$ 6,000
110	67	73506	2115	0	Recording Fee	-	2,000	2,000
110	67	85101	2115	0	Consulting Labor	-	10,000	10,000
Total Expenses						\$ -	\$ 18,000	\$ 18,000



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
Clean Fund								
Expenses								
110	67	65101	2120	0	General Legal Services	\$ -	\$ 5,000	\$ 5,000
Total Expenses						<u>\$ -</u>	<u>\$ 5,000</u>	<u>\$ 5,000</u>
California Resiliency Challenge								
Expenses								
110	67	60001	2225	0	Salaries & Wages - Fulltime	\$ 2,423	\$ 8,035	\$ 5,612
110	67	61000	2225	0	Fringe Benefits	806	3,635	2,829
110	67	65101	2225	0	General Legal Services	101	250	149
110	67	85101	2225	0	Consulting Labor	-	119,127	119,127
Total Expenses						<u>\$ 3,331</u>	<u>\$ 131,047</u>	<u>\$ 127,716</u>



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
HERO								
Revenues								
110	67	40603	5000	0	Hero Admin Fees	\$ 183,300	\$ 2,725,000	\$ 2,541,700
Total Revenues						\$ 183,300	\$ 2,725,000	\$ 2,541,700
Expenses								
110	67	60001	5000	0	Stwide AB811 Salaries & Wages	\$ 80,191	\$ 326,906	\$ 246,716
110	67	61000	5000	0	Fringe Benefit	25,750	182,932	157,182
110	67	63000	5000	0	Overhead Allocation	100,000	400,000	300,000
110	67	65101	5000	0	GENERAL LEGAL SERVICES	190,580	900,000	709,420
110	67	65505	5000	0	Bank Fee	-	48,000	48,000
110	67	65507	5000	0	Commissioners Per Diem	-	2,000	2,000
110	67	73102	5000	0	Parking Validations	-	200	200
110	67	73107	5000	0	Statewide - Event Support	-	500	500
110	67	73108	5000	0	General Supplies	-	300	300
110	67	73109	5000	0	Computer Supplies	-	1,000	1,000
110	67	73110	5000	0	Computer Software	-	2,000	2,000
110	67	73113	5000	0	NWCC- Membership Dues	-	1,500	1,500
110	67	73114	5000	0	Subscriptions/Publications	-	1,000	1,000
110	67	73115	5000	0	Meeting Support Services	16	500	484
110	67	73116	5000	0	Postage	86	2,000	1,914
110	67	73204	5000	0	Cellular Phone	268	1,500	1,232
110	67	73504	5000	0	Data Processing Support	1,776	8,000	6,224
110	67	73506	5000	0	Recording Fee	1,297	10,000	8,703
110	67	73601	5000	0	Seminar/Conferences	-	2,500	2,500
110	67	73611	5000	0	Travel - Mileage Reimbursement	-	500	500
110	67	73612	5000	0	Travel - Ground Transportatoin	-	500	500



Western Riverside Council of Governments
Budget-to-Actuals
As of September 30, 2022

Fund	Department	Account	Project	Location	Description	Actual	FY 23 Budget	Variance
110	67	73613	5000	0	Travel - Airfare	-	2,500	2,500
110	67	73620	5000	0	Lodging	889	1,500	611
110	67	73630	5000	0	Meals	13	500	487
110	67	73640	5000	0	Statewide Other Incidentals	-	500	500
110	67	73650	5000	0	Training	120	2,000	1,880
110	67	73703	5000	0	Supplies/Materials	-	1,500	1,500
110	67	81010	5000	0	Compliance Settlements	40,280	200,000	159,720
110	67	85101	5000	0	CA HERO Direct Exp	309	160,000	159,691
Total Expenses						\$ 441,574	\$ 2,260,338	\$ 1,818,764



Western Riverside Council of Governments Administration & Finance Committee

Staff Report

Subject: Approval of Administration & Finance Committee Meeting Schedule for 2023
Contact: Chris Gray, Deputy Executive Director, cgray@wrcog.us, (951) 405-6710
Date: December 14, 2022

Requested Action(s):

1. Approve the schedule of Administration & Finance Committee meetings for 2023.
-

Purpose:

The purpose of this item is to provide and obtain approval of a meeting schedule for 2023.

WRCOG 2022-2027 Strategic Plan Goal:

Goal #4 - Communicate proactively about the role and activities of the Council of Governments.

Background:

Attached are the proposed 2023 meeting dates for the Administration & Finance Committee. All meeting dates are proposed for the 2nd Wednesday of the month at 12:00 p.m.

Prior Action(s):

None.

Fiscal Impact:

This item is for informational purposes only; therefore, there is no fiscal impact.

Attachment(s):

[Attachment 1 - Admin & Finance Committee meeting schedule 2023](#)



WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS SCHEDULE OF MEETINGS FOR 2023

WRCOG Standing Committee	Day	Time	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
Administration & Finance Committee	2nd Wed.	12:00 p.m.	DARK	8	8	12	10	14	DARK	9	13	11	8	13



Western Riverside Council of Governments Administration & Finance Committee

Staff Report

Subject: Commercial PACE Activities Update - Limited Appointment of Program Administrative Responsibilities to Nuveen Green Capital

Contact: Casey Dailey, Director of Energy & Environmental Programs, cdailey@wrcog.us, (951) 405-6720

Date: December 14, 2022

Requested Action(s):

1. Recommend that the Executive Committee adopt Resolution Number 26-22; A Resolution of the Executive Committee of the Western Riverside Council of Governments authorizing and appointing Greenworks Lending, LLC, as Program Administrator in connection with the Temecula Senior Living Center, LLC, Commercial PACE Assessment Lien and documents related thereto and approving other actions in connection thereto.

Purpose:

The purpose of this item is to provide an update on the voluntary ceasing of operations of one of WRCOG C-PACE providers, CleanFund, and the appointment of its Temecula Senior Living Center C-PACE Assessment to Nuveen Green Capital.

WRCOG 2022-2027 Strategic Plan Goal:

Goal #5 - Develop projects and programs that improve infrastructure and sustainable development in our subregion.

Background:

WRCOG's PACE Programs provide financing to property owners to implement energy saving, renewable energy, water conservation, and seismic strengthening improvements. Improvements installed utilizing PACE financing are secured by placing a lien on the underlying property and are paid back through a line-item charge on the secured property tax bill. The Program was initiated in December 2011 and was expanded in 2014 to allow jurisdictions throughout the state to join, and allow property owners in these jurisdictions to participate.

Beginning in 2018, WRCOG began to receive significantly more interest in the Commercial, or C-PACE, side of the Program. Since then, WRCOG has partnered with Nuveen Green Capital (formerly Greenworks Lending) and Twain Financial Partners Holding to expand its C-PACE offerings throughout California. The growth in C-PACE is being seen across the United States with approximately 37 states now offering C-PACE financing, compared to only three states that offer residential PACE. Additionally, C-PACE projects more closely align with local government economic development efforts by offering competitive financing to businesses seeking to develop or expand new commercial facilities within its

jurisdictions.

CleanFund Commercial PACE Capital - Ceased Operations June 30, 2022

WRCOG's C-PACE Program has included participation from three providers: Nuveen Green Capital (formerly Greenworks), Twain Financial Partners, and CleanFund Commercial PACE Capital. CleanFund initially joined the WRCOG C-PACE Program as a provider on December 3, 2018. Unlike Twain and Nuveen, however, CleanFund only operated its program in the WRCOG subregion, meaning it was not authorized to utilize WRCOG's statewide PACE service area (388 jurisdictions).

As part of each provider's Administrative Agreements, the scope of program administration services to be provided by WRCOG's C-PACE providers include:

1. Program Design - Develop processes to review eligibility and approve applications.
2. Origination - Process applications and capital for approved projects, obtain consent of the first mortgage holder (if any), process funding requests, and generate contractual assessment documentation.
3. Marketing of Program - Develop outreach strategies and identify project opportunities.
4. Documentation - Develop standard set of documents suitable for all parties within the program.
5. Assessment tax roll management - ensure the proper contractually assessment installments are placed on the appropriate property owners' tax bills.
6. Regular reporting of complaints, claims, or legal action.

In May 2022, CleanFund closed its first and only project as part of WRCOG's C-PACE Program. The project was a \$12.4M new construction senior living project in Temecula that included energy efficient HVAC, lighting / electrical, building envelope and insulation, and water conserving plumbing. In June 2022, WRCOG staff was notified, by CleanFund, that CleanFund would be ceasing operations on June 30, 2022. Ceasing operations meant that the post-closing program administration services provided to WRCOG would be missing. Since that time, staff has been working with WRCOG Bond Counsel to identify ways to receive ongoing and routine program administration services such as providing reporting and tax roll management of the closed CleanFund project. After initial conversations, Nuveen Green Capital has indicated its willingness and interest in fulfilling any program administration services for this project.

To legally effectuate the transfer of administrative services, the Executive Committee would need to adopt a resolution (Attachment 1) to approve Nuveen, through limited appointment as program administrator of the specific CleanFund project. If adopted, this resolution would go into effect retroactively to September 26, 2022. Without program administrator support, WRCOG would have to rely on its third-party PACE consultants, which could come at an additional time & materials cost.

Prior Action(s):

None.

Fiscal Impact:

PACE Program Activities are included in the Agency's adopted FY 2022/2023 Budget under the Energy & Environmental Department. It is not anticipated that the appointment of Program Administrator responsibilities for this project will come at additional costs on the budget.

Attachment(s):

Attachment 1 - Resolution Number 26-22 Authorizing the Greenworks successor program administrator for the CleanFund Commercial PACE Program

Attachment

Resolution Number 26-22;
A Resolution of the Executive
Committee of the Western Riverside
Council of Governments authorizing
and appointing Greenworks Lending,
LLC, as program administrator in
connection with the Temecula Senior
Living Center, LLC, commercial
PACE assessment lien and
documents related thereto and
approving other actions in connection
thereto

RESOLUTION NUMBER 26-22

A RESOLUTION OF THE EXECUTIVE COMMITTEE OF THE WESTERN RIVERSIDE COUNCIL OF GOVERNMENTS AUTHORIZING AND APPOINTING GREENWORKS LENDING, LLC, AS PROGRAM ADMINISTRATOR IN CONNECTION WITH THE TEMECULA SENIOR LIVING CENTER, LLC, COMMERCIAL PACE ASSESSMENT LIEN AND DOCUMENTS RELATED THERETO AND APPROVING OTHER ACTIONS IN CONNECTION THERETO

WHEREAS, the Executive Committee of the Western Riverside Council of Governments (“WRCOG”) has established of the Energy Efficiency and Water Conservation Program for Western Riverside County (commonly referred to as the “WRCOG PACE Program”) for the purpose financing the installation of authorized improvements (“Authorized Improvements”) on commercial properties (“Commercial Properties”) located within the program area of the WRCOG PACE Program (the “Program Area”) as authorized under and defined by the WRCOG PACE Program; and

WHEREAS, at its December 3, 2018, meeting, WRCOG adopted Resolution Number 46-18 authorizing CleanFund Commercial PACE Capital, Inc., (“CleanFund”) to administer and finance authorized improvements to be installed on Commercial Properties within the Program Area and to administer and finance the installation of Authorized Improvements on Commercial Properties for the WRCOG PACE Program, entering into an Administration Agreement (as amended, the Amended and Restated Administration Agreement dated as of September 1, 2020, the “Administration Agreement”); and

WHEREAS, WRCOG adopted forms of a Master Indenture, a Supplemental Indenture and a Depositary and Account Control Agreement providing for the issuance and administration of limited obligation improvement bonds to be designated as the “Western Riverside Council of Governments Limited Obligation Improvement Bonds (CleanFund Commercial PACE Program) (First Commercial Property Tranche)” (the “Limited Obligation Improvement Bonds”) in one or more series (each such series of such bonds referred to as a “Series”) pursuant to Chapter 29 of Part 3 of Division 7 of the California Streets and Highways Code (“Chapter 29”), the Improvement Bond Act of 1915, being Division 10 of the Streets and Highways Code (the “1915 Act”) and the use of the proceeds of such bonds to finance the construction and installation of Authorized Improvements on commercial parcels that are participating in the CleanFund Commercial Program; and

WHEREAS, WRCOG has conducted the proceedings required by Chapter 29 with respect to the territory within the boundaries of the City of Temecula, California, (the “City”) to finance the Authorized Improvements on property owned by Temecula Senior Living Center, LLC, the record owner(s) (the “Property Owner”) of the fee title to certain real property (the “Participating Property”) and submitted application materials including a description of the Authorized Improvements dated May 18, 2022, (the “Assessment Contract”) with WRCOG whereby an assessment will be levied on the Participating Property to finance Authorized Improvements (the “Assessment”); and

WHEREAS, on May 18, 2022, CleanFund asked WRCOG to issue bonds (the “Bonds”) to finance the installation of the Authorized Improvements on the Participating Property in accordance with the Agreement to Pay Assessment and Finance Improvements, dated May 18, 2022, entered into by and between Property Owner and WRCOG and acknowledged by CleanFund, the Bond Indenture by and between WRCOG and Wilmington Trust, National Association, as Trustee thereunder (in such capacity, the “Trustee”) dated as of May 18, 2022, and the related notice of assessment and payment of contractual assessment required, the recordation of which creates a lien against the Participating Property (collectively, along with the ancillary documents executed by Property Owner in connection with the same, the “Financing Documents”); and

WHEREAS, on May 18, 2022, Silver Hill Funding, LLC, (dba Bayview PACE, “Bayview”) and CleanFund entered into an the Initial Program Administration, Assignment Under Program Fund Disbursement Agreement, and Indemnification Agreement (the “Initial Assignment Agreement”) to establish the terms under which: (i) CleanFund was to act as the Program Administrator under the Financing Documents in connection with the financing of the Authorized Improvements on the Participating Property on behalf of Bayview; and (ii) Bayview or its assignees and/or servicers, whether jointly or by assignment, was to serve as “Disbursement Assignee” with respect to the financing described in the Financing Documents and providing for the disbursement of funds for the Authorized Improvements, and all aspects associated therewith under the Program Fund Disbursement Agreement, dated on or about May 18, 2022, entered into between Property Owner, CleanFund, and Bayview (“Program Fund Disbursement Agreement”); and

WHEREAS, on June 30, 2022, CleanFund ceased its operations; and

WHEREAS, at its meeting on January 8, 2018, WRCOG adopted Resolution Number 02-18, authorizing Greenworks Lending, LLC, (“Greenworks”) to administer and finance its Commercial PACE Program within the Program Areas; and

WHEREAS, Greenworks acquired the assets of Bayview and as a result is successor-in-interest to Bayview pursuant to the Initial Assignment Agreement and is now desirous of taking over the Administration Agreement for the defunct CleanFund; and

WHEREAS, WRCOG now desires to appoint Greenworks as Program Administrator under the Administration Agreement for the Assessment and Greenworks is willing to accept such appointment through the Limited Appointment of Greenworks as Program Administrator Under the Amended and Restated Program Administration Agreement Assignment CleanFund Commercial PACE Capital, Inc., entered into and effective September 26, 2022 (the “Limited Appointment Agreement”).

NOW, THEREFORE, BE IT RESOLVED, by the Executive Committee of the Western Riverside Council of Governments as follows:

Section 1. Approval of Limited Appointment of Greenworks as Program Administrator. The Executive Committee hereby (i) approves Greenworks as successor Program Administrator to administer the CleanFund Commercial PACE Program of the WRCOG PACE Program with respect to the Property Owner; and (ii) approves the Limited Appointment of Greenworks as Program Administrator under the Limited Appointment Agreement. The Executive Committee hereby authorizes the delivery of and performance by WRCOG of the Limited Appointment Agreement.

Section 2. Effective Date. This Resolution shall take effect upon the date of its adoption.

PASSED AND ADOPTED at a meeting of the Executive Committee of the Western Riverside Council of Governments held on December 5, 2022.

Crystal Ruiz, Chair
WRCOG Executive Committee

Dr. Kurt Wilson, Secretary
WRCOG Executive Committee

Approved as to form:

Best Best & Krieger, LLP
Bond Counsel

AYES: _____

NAYS: _____

ABSENT: _____

ABSTAIN: _____



Western Riverside Council of Governments Administration & Finance Committee

Staff Report

Subject: 2023 General Assembly Speaker
Contact: Dr. Kurt Wilson, Executive Director, kwilson@wrcog.us, (951) 405-6701
Date: December 14, 2022

Requested Action(s):

1. Receive and file.

Purpose:

The purpose of this item is to provide an update on the 32nd WRCOG General Assemblies & Leadership Address.

WRCOG 2022-2027 Strategic Plan Goal:

Goal #4 - Communicate proactively about the role and activities of the Council of Governments and its members.

Background:

WRCOG's Annual General Assembly & Leadership Address provides an opportunity for WRCOG's member agencies to gather and share information regarding regional accomplishments and recognize members of the community who have made significant contributions to the region. The event also includes the approval of WRCOG's Annual Budget and selection of leadership positions for the forthcoming year. Each General Assembly & Leadership Address also features noteworthy speakers who can speak on issues of regional, statewide, national, and international importance.

Along with the business meeting, the event typically includes a presentation from a keynote speaker. Past speakers have included prominent figures from politics, government, and entertainment. At the November meeting of the Administration and Finance Committee, the discussion about a General Assembly speaker resulted in the adoption of selection criteria. Specifically, the committee capped the speaker fee at \$150,000 including travel and related expenses. Additionally, it was determined that the speaker must be particularly engaging in a way that would captivate the audience. The discussion also weighed the value of a big name speaker and whether or not that would impact ticket sales.

The recent transition of having the event funded from the WRCOG Supporting Foundation (Foundation) has provided a more transparent process for funding the event. During the transition period, however, the Foundation lacks the seed money for the event. As a result, a portion of last year's funds were seeded by WRCOG until enough sponsorship revenues were received to cover all costs. The current year will have a similar issue unless sponsorships are received early enough to address early pre-event costs such as deposits for the venue and speaker. In order to avoid the issue of seed money, the

Foundation would need to accumulate an adequate fund balance. The most likely scenario for the accumulation of funds would either be to have an extraordinary fundraising year or to reduce event-related expenses. The keynote speaker represents a substantial portion of the event cost and could be a consideration. If, for example, the speaker cost varied between lower and higher numbers from year to year, that may provide a path for the accumulation of funds to seed future events.

The previous speaker list was presented by the Washington Speakers' Bureau (WSB) and included speakers from a variety of industries and backgrounds. Following the November conversation, the WSB revised the list in order to exclude those whose costs exceed the \$150,000 cap and added additional names. During the November meeting, Committee member Dennstedt provided a recommendation for a speaker named Jocko. Subsequently, Committee member Washington also provided a recommendation for a speaker named Steve Pemberton. They have been included in the revised list attached.

In order to build on the previous discussions and in order to increase the chances of resolving the issue, one possible discussion path for the meeting would include:

1. Defining the scope of speakers - additions or deletions to existing list
2. Confirming or establishing criteria (i.e. \$150,000 all-inclusive cap, level of engagement, consideration of seed money, etc.)
3. Discussion and Ranking of speakers
4. Authorization to engage top choice(s) along with alternates and parameters.

Prior Action(s):

November 9, 2022: The Administration & Finance Committee directed the Executive Director to 1) take the necessary actions for the 2023 General Assembly & Leadership Address to take place on June 29, 2023, at Pechanga Resort Casino, including entering into an agreement for the event; and 2) find a speaker from the business / leadership sector, and cap the speaker contract at \$150,000.

Fiscal Impact:

There is no fiscal impact to the General Fund. Funds for General Assembly and its activities are raised through sponsorship.

Attachment(s):

[Attachment 1 - GA speaker compilation](#)

Additional Notes from WSB:

Mark King is a turnaround specialist who led TaylorMade and Addidas North America prior to Taco Bell.

Garrett Reisman and Mike Massaminno are included on here as both NASA Astronauts and run a podcast called “2 Funny Astronauts.” They just did their podcast program in person for a live client event and the client and audience love it. They interview each other on relevant topics while also doing audience Q&A.

Historian pairings: Doris and Jon Meacham are great friends and enjoy doing programs together. That could be a lot of fun and they could potentially moderate each other!

John Harwood: He’s a longtime journalist and White House Correspondent. He could speak and also potentially moderate another speaker and is a great storyteller.



JOCKO WILLINK

JOCKO WILLINK is a decorated retired Navy SEAL officer, author of the book Extreme Ownership: How U.S. Navy SEALs Lead and Win, and co-founder of Echelon Front, where he is a leadership instructor, speaker, and executive coach. Jocko spent 20 years in the U.S. Navy SEAL Teams, starting as an enlisted SEAL and rising through the ranks to become a SEAL officer. As commander of SEAL Team Three’s Task Unit Bruiser during the battle of Ramadi, he orchestrated SEAL operations that helped the “Ready First” Brigade of the US Army’s First Armored Division bring stability to the violent, war-torn city. Task Unit Bruiser became the most highly decorated Special Operations Unit of the Iraq War. Jocko returned from Iraq to serve as Officer-in-Charge of training for all West Coast SEAL Teams. There, he spearheaded the development of leadership training and personally instructed and mentored the next generation of SEAL leaders who have continued to perform with great success on the battlefield.

During his career, Jocko was awarded the Silver Star, the Bronze Star, and numerous other personal and unit awards. In 2010, Jocko retired from the Navy and launched Echelon Front with Leif Babin where he teaches the leadership principles he learned on the battlefield to help others lead and win. Clients include individuals, teams, companies, and organizations across a wide-range of industries and fields.

Topics: Extreme Ownership: Leadership is the Most Important Thing on the Battlefield, Mission Planning: How the Military Planning Model Applies to Business, Discipline Equals Freedom: The Dichotomy of Leadership, The Laws of Combat: Dominate Your Battlefield, Lead & Win, Combat Leadership: Build High Performance, Winning Teams, Safety & Risk Mitigation: Default Aggressive

Speaker Fee: approx. \$150-200k



STEVE PEMBERTON

Best Selling Author, Philanthropist, Acclaimed Speaker, and Senior Level Executive for the Likes of Monster.com, Walgreens Boots Alliance, and Workhuman.

Steve Pemberton's story is about defying seemingly insurmountable odds to become a trail-blazing corporate executive, enlightened diversity leader, visionary youth advocate, and acclaimed speaker. His best-selling memoir, *A Chance in the World*, recounts his triumphant life journey and drive to become a man of resilience, determination and vision. Now an upcoming major motion picture, *A Chance in the World* further amplifies Steve's highly motivational messages: Believe in your dreams, rise above obstacles, create opportunities for others, and most of all, persevere

Speaking Topics: Discovering new strengths in existing talent to maximize performance, From labels to experiences, Life experience marketing, A chance to lead: Strategies from everyday heroes to bring out the best in every employee

Speaker Fee: Approx. \$30-50k

The Washington Speakers Bureau Proposal



DORIS KEARNS GOODWIN

Presidential Historian and Pulitzer Prize-winning Author

Pulitzer Prize-winning author and presidential historian Doris Kearns Goodwin brings history alive with an uncanny sense for detail and a master storyteller's grasp of drama and depth as she examines the leadership triumphs, trials and tribulations of the men and women who have shaped this nation, culled from her lifetime examination of the U.S. presidency.

Doris Kearns Goodwin is a world-renowned presidential historian, public speaker and Pulitzer Prize-winning, *New York Times* #1 best-selling author. Since 2020 she has served as executive producer for the History Channel's miniseries events *Washington*, *Abraham Lincoln*, and *Theodore Roosevelt*, with more to come!

Goodwin is the author of seven critically acclaimed and *New York Times* best-selling books, including *Leadership in Turbulent Times*, which incorporates her five decades of scholarship studying Presidents Abraham Lincoln, Theodore Roosevelt, Franklin Roosevelt and Lyndon Baines

Johnson. Goodwin was awarded the Pulitzer Prize in history for *No Ordinary Time: Franklin and Eleanor Roosevelt: The Home Front in World War II*.

Well known for her appearances and commentary on television, Goodwin is seen frequently in documentaries and on television news and cable networks and late night talk shows.

Goodwin's interest in presidential leadership was inspired by her experience as a 24-year-old White House Fellow, working directly for President Johnson in his last year in the White House, and later assisting him in the preparation of his memoirs.

Goodwin graduated magna cum laude from Colby College. She earned a Doctor of Philosophy degree in Government from Harvard University, where she taught Government, including a course on the American Presidency. Goodwin lives in Boston. She was the first woman to enter the Boston Red Sox locker room in 1979, and is a devoted fan of the World Series-winning team.

FEE AND EXPENSES:

\$71,000.00 plus fully refundable, unrestricted first-class airfare for one and fully refundable premium economy for one (from LA, DC or Boston) plus professional commercially-insured ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for two.

VIEW CLIP(S):

[Doris Kearns Goodwin - What can we learn from pandemics throughout history?](#)

[Doris Kearns Goodwin How Important is a President's Tone During Times of Crisis?](#)

[Doris Kearns Goodwin on "Leadership: In Turbulent Times"](#)

[Doris Kearns Goodwin: On Bitterness Toward Obama](#)

[Loyola Marymount University Commencement 2013](#)

[Salon@615-Doris Kearns Goodwin in Conversation with Jon Meacham](#)

[Speech Clip - In the Presence of the Greatness of the Past](#)

[Speech Clip - Lincoln's Story and Legacy](#)

[Speech Clip - Presidents Overcoming Adversity](#)

[Speech Clip - Roosevelt's Leadership by Example](#)

[Speech Clip - Team of Rivals](#)

[Speech Clip - TED: Lessons from Past Presidents](#)

WEBSITE:

www.wsb.com/speakers/doris-kearns-goodwin/

JOHN HARWOOD

Award-winning political journalist; White House Correspondent

A Pulitzer Prize-winning journalist, John Harwood is a widely respected non-partisan expert in presidential politics and an admired voice in American homes renowned for his compelling explorations into headline-



grabbing events in Washington, as well as his must-see interviews with some of the most influential leaders shaping the future of our nation.

For more than three decades, John Harwood has covered the White House, Congress, national politics and the economy for America's most prestigious news organizations. He has interviewed every president from George H.W. Bush to Joe Biden, and received an Emmy nomination for his hour-long live CNBC town hall with President Barack Obama.

Steeped in public affairs since childhood, when his father was among the nation's top journalists of the last half of the 20th century, he graduated from Duke University with degrees in history and economics. He spent a year as a Nieman Fellow at Harvard.

For the Wall Street Journal, Harwood covered the first Bush White House, President Bill Clinton's agenda in Congress and four presidential campaigns. He was part of the Journal's team covering the 9/11 attacks on New York and Washington, which won the Pulitzer Prize. For the New York Times and CNBC, he chronicled the financial crisis and Great Recession, including the first 2009 television interview of Obama as he prepared to enter the presidency that January. He moderated Republican presidential debates during the 2012 and 2016 campaigns.

For CNN, Harwood covered the tumultuous final year of Donald Trump's presidency, and his 2020 election battle with Biden. He subsequently tracked the new chief executive's attempt to fashion and navigate a post-Trump era. No one is better equipped to interpret and explain the ups and downs of American elections and the intersection of politics and the economy. At this turbulent moment, a lifetime's experience gives him unique perspective on the challenges facing journalism and its role in our democracy.

FEE AND EXPENSES:

\$26,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

VIEW CLIP(S):

[John Harwood: Donald Trump Needs Help On Electoral Map | Squawk Box | CNBC](#)

[John Harwood Interviews President Obama on Financial Reform](#)

WEBSITE:

www.wsb.com/speakers/john-harwood/

JON MEACHAM

Presidential Historian and Author

Presidential historian and Pulitzer Prize-winning author Jon Meacham is one of America's most prominent public intellectuals. With a depth of knowledge about politics, history, religion, and current affairs, Meacham



has the unique ability to bring historical context to the issues and events impacting our daily lives.

*The author of several #1 New York Times bestsellers, Meacham has written acclaimed books about Thomas Jefferson, Andrew Jackson, Franklin D. Roosevelt, Winston Churchill, George H.W. Bush, and civil-rights icon John Lewis. A member of the Council on Foreign Relations and a fellow of the Society of American Historians, Meacham is a distinguished visiting professor at Vanderbilt University, where he holds the Rogers Chair in the American Presidency. His latest book, *And There Was Light: Abraham Lincoln and the American Experiment*, will be published in the fall of 2022.*

A skilled orator with a depth of knowledge about politics, religion, and current affairs, Meacham has the unique ability to bring historical context to the issues and events impacting our daily lives to audiences of all backgrounds.

New York Times bestseller, *Songs of America*, is a celebration of the music that helped shape a nation. Co-written by musician Tim McGraw, *Songs of America* was praised as “a glorious celebration of our diversity” by Quincy Jones and an “unusually well-written and moving story” by Ken Burns.

Meacham's #1 New York Times bestseller, *The Soul of America: The Battle for Our Better Angels*, examines the present moment in American politics and life by looking back at critical times in U.S. history when hope overcame division and fear. He is a co-author of *Impeachment: An American History*, which reveals the complicated motives behind the three impeachments in U.S. history.

FEE AND EXPENSES:

\$84,000.00 plus professional commercially-insured round trip ground transportation (event city), and hotel accommodations.

VIEW CLIP(S):

[Jon Meacham at The Commonwealth Club: Partisanship in Washington is Not New](#)

[Speech Clip - Jon Meacham on God, Politics, and Lincoln](#)

[Speech Clip - Meacham at Google on "Thomas Jefferson: The Art of Power"](#)

DOUGLAS BRINKLEY

American Historian and Best-Selling Author; Presidential Historian, CNN; Katherine Tsanoff Brown Chair in Humanities and Professor of History at Rice University

Monumental in his contribution to American culture, Douglas Brinkley takes the historical lessons of the past and applies them to the present and our future.



Called “America’s new past master” and “the best of the new generation of American historians,” Dr. Douglas Brinkley is a distinguished professor of history at Rice University and a fellow at the James A. Baker III Institute for Public Policy. His writing covers a broad range of topics, including presidents, military campaigns, American leaders, Catholicism and Hurricane Katrina. He thrills audiences with his insights on history’s biggest people and events and how they relate to current events.

He is the Presidential Historian for CNN and a contributing editor for *Vanity Fair*. *The New York Times* selected five of Brinkley’s award-winning books as Notable Books of the Year, and *The Reagan Diaries* was a *New York Times* best seller. *The Quiet World: Saving Alaska’s Wilderness Kingdom, 1879-1960* offers a riveting, expansive look at the past and present battle to preserve Alaska’s wilderness. His second Reagan book, *The Notes: Ronald Reagan’s Private Collection of Stories and Wisdom* (2011), showcases the president’s well-read, thoughtful side as well as the humor that helped him woo his allies and opponents alike. Brinkley edited the book into nine chapters ranging from war to religion.

He is the official biographer of Rosa Parks. Brinkley’s 2005 biography, *Rosa Parks: A Life*, is a revelatory portrait of an American heroine and her tumultuous times. In his *New York Times* best seller, *Cronkite* (2012), Brinkley brings this American icon into focus as never before drawing on his unprecedented access to Cronkite’s private papers as well as interviews with his family and friends.

His book, *The Nixon Tapes* (2014), also a *New York Times* best seller, offers a selection of fascinating scenes including the year Nixon opened relations with China, negotiated the SALT I Arms Agreement with the Soviet Union, and won a landslide reelection victory—providing a never-before-seen glimpse into a flawed president’s hubris, paranoia, and political genius. In 2017, he wrote *JFK: A Vision for America* (2017), which tells the story—in words and pictures—of President John F. Kennedy’s life and presidency, and depicts his compelling vision for America. His most recent book *American Moonshot: John F. Kennedy and the Great Space Race* was a *New York Times* best seller.

FEE AND EXPENSES:

\$21,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one. *A fixed flat fee is available to cover travel expenses.*

VIEW CLIP(S):

[Doug Brinkley - Presidential Lecture Series](#)
[Douglas Brinkley on President Kennedy’s Commitment to Space Exploration](#)
[Douglas Brinkley: 2016 National Book Festival](#)
[History with David M. Rubenstein: A Conversation with Douglas Brinkley](#)
[The Wilderness Warrior: Theodore Roosevelt and the Crusade for America](#)
www.wsb.com/speakers/douglas-brinkley/

WEBSITE:



MICHAEL BESCHLOSS

Presidential Historian, NBC News and PBS NewsHour, New York Times Columnist and #1 Best-Selling Author

Telling original and unforgettable stories that illuminate the behind-the-scenes lives of American presidents and other titans, Michael Beschloss describes the leadership skills essential to almost every kind of success.

Michael Beschloss provides gripping tales and brilliant inside analysis, revealing the leadership secrets of great Presidents and other towering figures in history. Trained at the Harvard Business School in leadership studies, Beschloss unravels the mysteries of powerful and effective leadership in areas from business to politics to sports. He is a contributing columnist for *The New York Times*, writing a monthly column on business history (Sundays) and a weekly column on sports history (Saturdays). Winner of an Emmy award, Beschloss also serves as NBC News Presidential Historian and contributes to the *PBS NewsHour*. He is the author of nine best-selling books, including *Presidential Courage: Brave Leaders and How They Changed America, 1789-1989*, *Jacqueline Kennedy: Historic Conversations on Life with John F. Kennedy* (co-authored with Caroline Kennedy) and two volumes on President Lyndon Johnson's secret White House tapes. With more than 110,000 followers, Beschloss also has the largest Twitter following of any historian on earth; his popular site appears on *TIME* magazine's list of the world's top Twitter feeds. \$46,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

FEE AND EXPENSES:

VIEW CLIP(S):

[Michael Beschloss "Sizzle Reel"](#)

[Speech Clip - On Presidential Sites](#)

WEBSITE:

www.wsb.com/speakers/michael-beschloss/

GARRETT REISMAN

NASA Astronaut, SpaceX Director of Space Operations, Professor at USC

A NASA Astronaut who flew on all three Space Shuttles and went on to become an executive at Elon Musk's SpaceX, Dr. Garrett Reisman will describe what it was like to fly on the Space Shuttle and what the future holds for human spaceflight in an unforgettably funny and entertaining way.



Garrett Reisman is a former NASA Astronaut, Currently he is a Professor of Astronautical Engineering at USC and a Senior Advisor at SpaceX. Thus, he is a major player in both the American space program's past and future. With funny and personal stories, he will tell you what was it like to launch on the space shuttle, do a spacewalk, see the Earth from space, re-enter the atmosphere, be interviewed by Stephen Colbert and work for Elon Musk. He can provide an insider perspective on innovation at both NASA and SpaceX and share other lessons learned about how to inspire yourself and your team, how to muster the determination required to achieve great things, and how to be a truly visionary leader. Dr. Reisman will give you a behind the scenes look at what is coming up next in human spaceflight, a golden new age of exploration that is right around the corner!

FEE AND EXPENSES:

\$54,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

VIEW CLIP(S):

[Astronaut Garrett Reisman, Keynote Speaker](#)
[Garrett Reisman - Limmud FSU 2010 - New York](#)
[Inspiration & Determination](#)
[Limmud FSU West Coast 2017 - Astronaut Garrett Reisman speech](#)
[What's It Like To Launch In The Space Shuttle?](#)
www.wsb.com/speakers/garrett-reisman/

WEBSITE:



MIKE MASSIMINO, PH.D.

Former NASA Astronaut, NY Times Bestselling Author; Media & TV Personality; Columbia University Professor

The first person to tweet from space and a four-time spacewalker on two missions to the Hubble Space Telescope, including the final Hubble servicing mission, which has been called the most dangerous and complex mission in space shuttle history, Mike Massimino uses humor and his unique storytelling ability to inspire audiences to identify the passion in their work, to use teamwork and innovation to solve problems, to provide leadership in the face of adversity, and to never give up when pursuing a goal.

Mike Massimino is a former NASA Astronaut, a New York Times bestselling author, a Columbia University engineering professor, and an advisor at The Intrepid Sea, Air and Space Museum. A veteran of two space shuttle missions and four spacewalks, Mike was the first person to tweet from space, holds the team record for the most spacewalking time on a single space shuttle mission, and successfully completed the most complicated spacewalk ever attempted to repair the Hubble Space Telescope. Mike persisted through three rejections over 7 years on his

FEE AND EXPENSES:

VIEW CLIP(S):

WEBSITE:

way to becoming an astronaut, including overcoming a medical disqualification by training his eyes and brain to see better. He has had a recurring role as himself on the CBS comedy “The Big Bang Theory,” is the host for the Science Channel Series “The Planets and Beyond,” was featured in National Geographic Television’s “One Strange Rock,” is a frequent expert guest on news programs and late night television (including Good Morning America, The Today Show, CNN, Fox News Channel, MSNBC, CNBC, and The Late Show with David Letterman), and has been called the real-life astronaut who inspired George Clooney’s role in the movie “Gravity.” He lives in New York City.

\$31,000.00 plus fully refundable, unrestricted business class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

[Introducing Mike Massimino](#)

[Mike Massimino - Media Highlights](#)

[Mike Massimino on An Astronaut's View of Space](#)

[Mike Massimino on Following Dreams and Setting Goals](#)

[Mike Massimino on Paying Tribute to His Experience](#)

[Mike Massimino on Recognizing the Purpose in Your Work](#)

[Mike Massimino on Teamwork and Never Giving Up](#)

[Mike Massimino on Water Survival](#)

www.wsb.com/speakers/mike-massimino-ph-d/



PLATON

World-Renowned, Award-Winning Photographer; Founder, The People's Portfolio

A master photographer with a penchant for getting the world’s most powerful people to showcase their humanity, Platon proves that an image is just the beginning of the story.

Platon is a gifted storyteller and master photographer, having photographed more world leaders than anyone else in history, including six American presidents. His evocative portraits showcase the stories of both the privileged and the deprived – to break down personal barriers and capture people’s truth.

To him, taking one’s portrait it is an intimate collaboration and a visual interview, both in front of and behind the camera. “My job is to tell the truth and to capture someone’s spirit on a certain day,” he says. “And it’s never the whole truth; it’s the truth I experience in a very intense and intimate fashion.”

The British-born Platon has produced stunning portraits of some of the world’s most prominent figures – from Barack Obama and Mark

Zuckerberg to Muhammad Ali and Hugo Chavez. His photographic works have graced the pages of an array of influential international publications, including *The New York Times*, *Rolling Stone*, *Esquire*, *Vogue*, and *Vanity Fair*.

Over his storied career, Platon developed a special relationship with *TIME*, producing over 30 cover photos for the magazine. In 2007, he photographed Vladimir Putin for *TIME*'s Person of the Year cover. The image, featuring the inscrutable visage of the Russian leader, won him first prize at the World Press Photo Contest.

In 2008, Platon became the staff photographer for *The New Yorker*, where he has produced a series of large-scale photo essays, including President Obama's inauguration, the U.S. military, portraits of world leaders, and the civil rights movement. Additionally, he covered the emergence of civil society in Russia, which earned him a Peabody Award.

Platon also creates haunting images of everyday people – including grieving parents who've lost their children to war, human rights defenders around the world, and survivors of sexual violence in the Congo. It's this work that powers his nonprofit foundation, The People's Portfolio, where he aspires to create a visual language that breaks barriers, expands dignity, fights discrimination, and enlists the public to support human rights around the world.

"I'm turning the lens away from power to the people who have been robbed of power, to try and create a new set of cultural heroes that will not make us feel guilty, but will inspire us to be better," Platon says.

His belief in the power of storytelling is rooted in a background in the arts. His enduring gift is his ability to communicate with everyone he encounters – seeing through the mask of leadership, celebrity, and even pain, to find the common thread that connects us all: our humanity.

Platon has published two monographs. The first, *Power*, is an unprecedented anthology of 120 intimate portraits of world leaders from across the political spectrum to create a profound portrait of global power. Shot over a three-year period at the United Nations, and captured with unique candor and insight, these photographs offer an intimate glimpse at the personalities behind the public faces of the world's most powerful decision-makers.

The other, *Service*, highlights the valor, emotions, and physical and psychological wounds of men and women in the U.S. military. His work has been exhibited at some of the world's most prestigious galleries and museums, including the Scotland National Portrait Gallery in Edinburgh.

In his presentations, Platon also shares the stories from his photo essays

on the civil rights movement, his work with Human Rights Watch featuring the leaders of the Egyptian revolution, his photoshoot for *TIME* of Aung San Suu Kyi, and, most recently, his experience photographing Edward Snowden in Moscow for his exclusive interview with Wired magazine.

With audiences, Platon is energetic, impassioned, and soul-stirring, as he explores the highs and lows of humanity through his portraits. Using his platform as a speaker, he explores what it means to be a great leader, using his famous and everyday subjects as examples. Tying in his message of empathy, open dialogue, and unity, Platon encourages listeners to connect deeply and challenge perspectives — in order to find common ground and propel forward.

FEE AND EXPENSES:

\$46,000.00 plus fully refundable, unrestricted first-class airfare for one and round-trip, unrestricted coach airfare for one (from NYC or DC) plus professional commercially-insured ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for two.

VIEW CLIP(S):

[Platon - Overview](#)

[Platon - Putin](#)

[Platon - The Invisible Conflict](#)

[Platon - The Most Powerful Photo of the 2008 Election](#)

[Platon at WEF on Art as Bridge Building](#)

[Platon at WEF on The Secret Ingredient to Being a Great Leader](#)

[Speech Clip - Platon on Photographing HW Bush](#)

WEBSITE:

www.wsb.com/speakers/platon/



ERIK WAHL

Groundbreaking Artist, Author and Expert on Creativity and Innovation

Erik Wahl is an internationally recognized artist, TED speaker, and No. 1 bestselling author. His breakthrough experience as an artist and entrepreneur has translated into making him into one of the most sought-after corporate speakers on the circuit today.

On stage, Erik's keynote experience creates a dynamic multidimensional metaphor for how to systematically embrace innovation and risk. His message: disruption is the new normal and businesses must embrace creativity in a wholesale fashion, or risk being left behind. Erik's presentation inspires organizations to be increasingly agile and outlines how to use disruption as a competitive advantage. Some companies will be disrupted others will choose to be the disruptor. Choose wisely.

His new book, *The Spark and the Grind*, activates the essential components of translating ideas into action. His breakthrough thinking has earned praise from the likes of top influencers in both art and

business. Erik's previous book, a bestseller called *Unthink* was hailed by Forbes Magazine as The blueprint to actionable creativity, and by Fast Company Magazine as "provocative with a purpose."

The Warhol of Wall Street, the Renoir of ROI, The Picasso of Productivity, the Jobs of ... Well, Jobs. Erik discovered an alarming truth early in his career as a partner in a corporate firm: organizations that encouraged the mental discipline of creativity did better than those that did not put innovation as a priority mission. So, he set out to challenge companies to change their way of thinking.

In the meantime, inspired by street art, he became an acclaimed graffiti artist—though he has since stopped selling his works for personal gain, and instead uses his art to raise money for charities. His keynote is where his passion for business growth and art converge into a fascinating performance.

Erik's list of clients includes AT&T, Disney, London School of Business, Microsoft, FedEx, Exxon Mobil, Ernst & Young, and XPrize.

Interested in learning more or watching Erik in action? Take a look at theartofvision.com

FEE AND EXPENSES:

\$41,000.00 plus accommodations: Two (2) rooms for two nights at a hotel at or near the venue.

VIEW CLIP(S):

[Erik Wahl on The Future of Virtual](#)

[Erik Wahl on Adapting To The New Normal - Virtual Keynote Experience](#)

[Erik Wahl - Speaking Reel](#)

[Sizzle Reel](#)

[Speech Clip - The Discipline of Creativity](#)

[Speech Clip - The Spark and the Grind](#)

WEBSITE:

www.wsb.com/speakers/erik-wahl/

BRANDON STEINER

CEO/Founder, Steiner Sports; CEO/founder, CollectibleXchange, Athlete Direct, & Stadium Authentics; Notable Author of "You Gotta Have Balls," "The Business Playbook," and "Living with Purpose"

How many people can say they've made millions from selling dirt? With a one-of-a-kind entrepreneurial spirit and passionate pursuit of "what's next," Brandon Steiner is a sales and business inspiration to all.



Brandon Steiner is the founder and CEO of The Steiner Agency and CollectibleXchange, a revolutionary platform that allows individuals to buy, sell and appraise collectibles like never before. Steiner is also the founder and former CEO of Steiner Sports.

On stage, Brandon shares his 35+ years of experience in sports marketing and sales. Weaving together the critical lessons learned - in life and business - along with the proven strategies he has implemented in all of his ventures, Brandon's audiences learn how to think outside the box, identify the customer's needs, and stand out from the competition.

As a poor kid in Brooklyn, Brandon learned to hustle from the start. When he was ten years old, he faced his first significant business obstacle while working the paper route. Frustrated with his lack of sales, his mother sat him down and gave him one of the most valuable lessons he remains true to. She told him 1) He must differentiate himself, and 2) he had to stop selling and instead start serving and solving his customer's problems. That conversation forever changed Steiner's perspective of sales and business.

After conquering the paper route, he turned his love for sports into his business. With just \$4,000, he created Steiner Sports to represent athletes for speaking engagements and corporate appearances and evolved it into a \$50 million company. While many would be satisfied with this success, Brandon was not. Believing that your first idea is never your best, Brandon expanded Steiner Sports' focus to include marketing collectible items since the athletes Brandon represented were already signing memorabilia pieces.

In 2004, he created an unprecedented partnership with the New York Yankees, offering fans authentic Yankees memorabilia and one-of-a-kind fantasy experiences at Yankee Stadium.

Again, Brandon had reached the high peaks of success, but he was still thinking about "what's next." In 2008, he discovered it. Brandon created another unique market by purchasing exclusive rights to major portions of the soon-to-be disassembled "Old" Yankee Stadium. At first, he sold Yankee Stadium dirt which turned into sales of over \$60 million. Inspired, he began selling old Yankee Stadium chairs, bases — everything and anything he could get his hands on.

Brandon added author to his resume in 2003 with his first book, *The Business Playbook: Leadership Lessons from the World of Sports*. His second book, *You Gotta Have Balls: How a Kid from Brooklyn Started from Scratch, Bought Yankee Stadium, and Created a Sports Empire*, chronicles his long career and the life and business lessons he learned therein.

Brandon is a regular guest on 98.7 FM/ESPN-NY Radio and co-host of the

YES Network's "Yankees-Steiner: Memories of the Game" series. He frequently comments on sports and marketing on networks including CNBC, CNN, MSNBC, and ESPN, and newspapers including *The New York Times* and *The Wall Street Journal*.

FEE AND EXPENSES: \$36,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

VIEW CLIP(S): [Brandon Steiner - Don't Let Success Hold You Back From Finding What's Next](#)
[Brandon Steiner - Stop Selling and Start Creating Value](#)
[Brandon Steiner on Dreaming Big](#)
[Brandon Steiner on Selling vs. Serving](#)
[Brandon Steiner Speaking Reel 2022](#)

WEBSITE: www.wsb.com/speakers/brandon-steiner/



DAVID GERGEN

Senior Political Analyst, CNN

A trusted advisor to four presidents and to both political parties, David Gergen offers a bipartisan analysis of recent political history and what today's headlines mean for the future of America.

A true public servant, David Gergen put his country above his personal politics, serving as an advisor to Presidents Nixon, Ford, Reagan and then Clinton. Today he helps audiences break through ideological barriers to recognize simple and lasting political truths and to reflect on the practice of leadership. Gergen's unique vantage point—serving as an Oval Office insider to presidents from different political parties—provides him with insights that few others can match. For more than 30 years, Gergen has been an active participant in American political life. Since leaving government, he has served as editor-at-large of *U.S. News & World Report* and as the founding director of the Center for Public Leadership at Harvard's John F. Kennedy School of Government. Now, he is a Professor of Public Service at the Kennedy School and a Senior Political Analyst for CNN.

Gergen's New York Times best-seller *Eyewitness to Power: The Essence of Leadership, Nixon to Clinton*, offers an inside glimpse into the corridors of power and the leadership challenges presidents face, bringing clarity to

the most complex international and domestic issues. His newest book, *Hearts Touched with Fire: How Great Leaders are Made*, calls to younger generations to pursue lives of service and public leadership — along with a practical playbook on how they can succeed, and was released in May 2022.

FEE AND EXPENSES:

\$45,500.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one. *A fixed flat fee is available to cover travel expenses.*

VIEW CLIP(S):

[CNN's David Gergen: Where is America Headed?](#)
[David Gergen at Davos WEF 2019 – How Will the Next President Heal the U.S.?](#)
[David Gergen at Harvard Forum: My Nightmare Scenario](#)
[David Gergen Introduces Panel Speakers](#)
[Speech Clip - How a Destabilized Europe Impacts the U.S.](#)
[Speech Clip - Rising International Powers](#)
www.wsb.com/speakers/david-gergen/

WEBSITE:



JACK NICKLAUS

Legendary Professional Golfer

Golden lessons for success and living up to your full potential in work, life, and sport.

Jack Nicklaus knows what it takes to be a champion—in golf and in life. From the moment he stepped foot on a course at age 10 with his father, Nicklaus showed an early mastery of the sport of golf. He had the raw talent to compete, but it was his skills, mindset, and strength of character that allowed him to make a career for himself out of the game.

As Nicklaus rose through the ranks of golf's most formidable players — from his first U.S. Amateur championship at age 19 to making history with his sixth Masters title at age 46 — his story is one that is centered on persistence, preparation, mental toughness, and commitment to true sportsmanship. His unique ability to promote camaraderie among rivals, in what is a fiercely competitive sport, served as a catapult for his monumental success.

After completing a celebrated five decades on the professional scene—in which he won a record 18 professional major championships over a 25-year span— Nicklaus applies the same champion's mentality to his efforts

as a family man, businessman, and ambassador of good will. Giving back is truly at his core.

For his commitment to philanthropy and outstanding achievement in sports, Nicklaus has garnered numerous accolades, including *Sports Illustrated's* Individual Male Athlete of the 20th Century, as well as the magazine's Muhammad Ali Legacy award. He's also one of only four individuals in history – and first athlete or sportsperson – to be presented with the Presidential Medal of Freedom, Congressional Gold Medal, and the Lincoln Medal.

When Nicklaus shares his storied journey, he speaks off the cuff and from the heart. His enthralling tales about life and family on – and off – the links offer a rare and unforgettable glimpse at real life with one of the most legendary figures in golf and sports.

FEE AND EXPENSES:

\$126,000.00 plus plus private plane, West of Dallas events (Citation X or larger); East of Dallas events (Hawker 800 or larger), professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and meals and incidentals for two.

VIEW CLIP(S):

[Jack Nicklaus talks golf, life and politics with Bret Baier](#)

[Jack Nicklaus: "Golfers are selfish"](#)

WEBSITE:

www.wsb.com/speakers/jack-nicklaus/



BOB IGER

Former CEO & Chairman, The Walt Disney Company

Widely recognized as one of the most innovative and successful CEOs in history, Bob Iger led The Walt Disney Company through years of growth and transformation, as well as periods of difficulty and crises. Under his leadership, Disney became one of the largest and most admired media and entertainment companies in the world.

At a time when competition was more intense and technology was changing faster than ever, Iger's visionary leadership and commitment to excellence were reflected in Disney's strong position in the industry and beyond. Practical concepts such as optimism, courage, decisiveness, and fairness are the bedrock of his proven leadership style. Now he shares his unique insights with audiences in a presentation that informs, inspires, and captivates.

Over his 15+ years leading Disney, Iger's strategic vision focused on three fundamental pillars: generating the best creative content possible; fostering innovation and utilizing the latest technology; and expanding into new markets around the world. He is the author of the #1 *New York Times* Best Seller *The Ride of a Lifetime: Lessons Learned from 15 Years as CEO of The Walt Disney Company*, published in 2019.

FEE AND EXPENSES:	\$151,000.00 plus professional commercially-insured round trip ground transportation.
VIEW CLIP(S):	Bob Iger on Being Bold Bob Iger on Creating a Lasting Impact Bob Iger on Embracing Life Enthusiastically Bob Iger on Failure Before Success Bob Iger Speaking Reel 2022
WEBSITE:	www.wsb.com/speakers/bob-iger/



JOSÉ ANDRÉS

Chef, Restaurateur, Humanitarian

A creative culinary innovator and exemplary business leader, José Andrés inspires people across the globe with his dynamic vision and diverse projects aimed at making the world a better place through the power of food.

One of *TIME* magazine's most influential people in the world and one of the most popular chefs in America, José Andrés has infused his pure energy, brilliance, and fun into many of the world's most trendsetting restaurants. Over the course of his trailblazing career, he has built a wildly successful multi-concept brand that reaches beyond borders.

A champion for the role of chefs in the debate on food policy, Andrés is called upon regularly to speak on a variety of issues revolving around hunger, food security, childhood nutrition education, clean cookstoves, international development, and agriculture. In 2014, he was awarded Refugees International's McCall-Pierpaoli Humanitarian Award for his work in combating hunger worldwide. President Obama awarded Andrés a National Humanities Medal in 2015, the same year that the EY Entrepreneur of the Year Greater Washington named him a "Master Entrepreneur." Profiled on *60 Minutes*, Andrés regularly appears on *Today* and *Top Chef*, as well as NPR's *The Splendid Table* and *All Things Considered*. His innovative minibar by José Andrés earned two Michelin stars in 2016.

He is the only chef globally that has both a two-star Michelin restaurant and four Bib Gourmands. Andrés also teaches “Science and Cooking” at Harvard University as well as “The Sustainable Plate” at George Washington University, and has written widely read editorials for *The Washington Post*, *National Geographic*, and *Eater* on issues surrounding immigration, food policy, and international development.

FEE AND EXPENSES:

\$116,000.00 plus first class expenses for three, to include cash equivalent of fully refundable, unrestricted first class airfare for three, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations (two standard king rooms, and a one bedroom suite), and reasonable meals and incidentals for three.

VIEW CLIP(S):

[Jimmy and Chef José Andrés Talk Puerto Rico's Food and Recovery](#)
[José Andrés at SXSW 2018 - When charity seems to be redemption of the giver](#)
[José Andrés at TED - A movement that everyone can get behind](#)
[José Andrés on Thinking Outside the Box within the Food Industry](#)
[José Andrés with Martha Stewart at TIME 100](#)
[TEDxMidAtlantic: Creativity in Cooking Can Solve Our Biggest Challenges](#)
[TEDxMidAtlantic: How a Team of Chefs Fed Puerto Rico After Hurricane Maria](#)

WEBSITE:

www.wsb.com/speakers/jose-andres/



WALTER ISAACSON

Best-Selling Author; Acclaimed Historian and Journalist; Professor of History, Tulane University

Best-selling author and highly acclaimed journalist, Isaacson gives voice to the historical figures and business icons who have shaped and transformed our nation and the world.

Walter Isaacson is a Professor of History at Tulane and an advisory partner at Perella Weinberg, a financial services firm based in New York City. He is the past CEO of the Aspen Institute, where he is now a Distinguished Fellow, and has been the chairman of CNN and the editor of *TIME* magazine.

Isaacson’s most recent biography, *The Code Breaker: Jennifer Doudna, Gene Editing, and the Future of the Human Race* (2021) offers a gripping account of how Nobel Prize winner Jennifer Doudna and her colleagues launched a revolution that will allow us to cure diseases, fend off viruses, and have healthier babies. He is also the author of *Leonardo da Vinci* (2017), *The Innovators: How a Group of Hackers, Geniuses, and Geeks Created the Digital Revolution* (2014), *Steve Jobs* (2011), *Einstein: His Life and Universe* (2007), *Benjamin Franklin: An American Life* (2003), and

Kissinger: A Biography (1992), and coauthor of *The Wise Men: Six Friends and the World They Made* (1986). He is a host of the show "Amanpour and Company" on PBS and CNN, a contributor to CNBC, and host of the podcast "Trailblazers, from Dell Technologies."

Isaacson was born on May 20, 1952, in New Orleans. He is a graduate of Harvard College and of Pembroke College of Oxford University, where he was a Rhodes Scholar. He began his career at *The Sunday Times of London* and then the *New Orleans Times-Picayune*. He joined *TIME* in 1978 and served as a political correspondent, national editor, and editor of digital media before becoming the magazine's 14th editor in 1996. He became chairman and CEO of CNN in 2001, and then president and CEO of the Aspen Institute in 2003.

He is chair emeritus of Teach for America. From 2005-2007 he was the vice-chair of the Louisiana Recovery Authority, which oversaw the rebuilding after Hurricane Katrina. He was appointed by President Barack Obama and confirmed by the Senate to serve as the chairman of the Broadcasting Board of Governors, which runs Voice of America, Radio Free Europe, and other international broadcasts of the United States, a position he held from 2009 to 2012. He is a member of the American Academy of Arts and Sciences, the Royal Society of the Arts, and the American Philosophical Society.

He serves on the board of United Airlines, the New Orleans City Planning Commission, the New Orleans Tricentennial Commission, Bloomberg Philanthropies, the Rockefeller Foundation, the Society of American Historians, the U.S. Defense Department Innovation Board, the Carnegie Institution for Science, and My Brother's Keeper Alliance.

FEE AND EXPENSES:

\$136,000.00 plus expenses for one to include hotel, meals and incidentals (airfare and ground transportation is included in fee).

VIEW CLIP(S):

[Walter Isaacson on The Code Breaker: Jennifer Doudna and Gene Editing Is Curiosity a Mark of True Genius?](#)

[Meet Walter Isaacson](#)

[Speech Clip - Don't Be Afraid, You Can Do It](#)

[Speech Clip - Passion for Curiosity](#)

[Speech Clip - Simplicity and User Interface](#)

[Speech Clip - The Parts Unseen](#)

[Walter Isaacson in conversation with Doris Kearns Goodwin - The Code Breaker](#)

[Walter Isaacson on the "Accessible Genius" of Leonardo da Vinci](#)

[Walter Isaacson: The Making of a Genius](#)

[Why Walter Isaacson Writes About Innovators Who Make History](#)

WEBSITE:

www.wsb.com/speakers/walter-isaacson/

MEL ROBBINS



Serial entrepreneur; Best-selling author; Internationally recognized social media influencer; Founder & CEO of 143 Studios, Inc.

*Mel's digital platform inspires more than 20 million people a month with transformative videos, articles, positive psychology research, and inspiring content. Mel's latest book, *The 5 Second Rule*, is a fixture on Amazon's "Top Ten Most Read List" and one of the most successful audio books ever published. Her TEDx talk about change has more than ten million views. Her latest international best-seller, *The High 5 Habit*, was released around the world in September 2021.*

Mel Robbins' is the Founder & CEO of 143 Studios, Inc., where she and her team create, produce, and publish first-of-its-kind audio and visual content for a digital audience of ~60 million per month. 143 Studios produces and manages content across all social platforms for the Mel Robbins brand. They are also the team responsible for the four #1 Audiobook productions for Audible.

On stage, Mel is a riveting, fun, and unforgettable speaker, teaching audiences a wide range of science-backed strategies with life-changing impact. Mel has spoken to executives at some of the world's leading brands, including Microsoft, JP Morgan Chase, Optum, Cisco, and AT&T. \$101,000.00 plus hotel accommodations and reasonable meals and incidentals for two (airfare and ground transportation included in fee).

FEE AND EXPENSES:

VIEW CLIP(S):

[Mel Robbins on Taking Action](#)
[Mel Robbins on Understanding Outside Criticism](#)
[Mel Robbins on Where Negative Self Talk Begins](#)
[Mel Robbins Talks Taking Control of Your Thought Patterns](#)
www.wsb.com/speakers/mel-robbins/

WEBSITE:



IAN BREMMER

President and Founder, Eurasia Group and GZERO Media; Expert on Global Politics & Risk Management and Best-Selling Author

Creator of Wall Street's first-ever global political risk index and the president of Eurasia Group, Ian Bremmer is a sought-after adviser on international risk management who reads the global political and economic landscape.

Ian Bremmer is a political scientist who helps business leaders, policy makers, and the general public make sense of the world around them. He is president and founder of Eurasia Group, the world's leading political risk research and consulting firm, and GZERO Media, a company dedicated to providing intelligent and engaging coverage of international affairs. Ian is an independent voice on critical issues around the globe, offering

clearheaded insights through speeches, written commentary, and even satirical puppets.

He is the host of GZERO World with Ian Bremmer, which airs weekly on US national public television. Ian is also a frequent guest on CNN, Fox News, MSNBC, the BBC, Bloomberg, and many other television stations around the world.

Ian is credited with bringing the craft of political risk to financial markets, creating Wall Street's first global political risk index (GPRI), and for establishing political risk as an academic discipline. His definition of emerging markets—"those countries where politics matters at least as much as economics for market outcomes"—has become an industry standard. "G-Zero," his term for a global power vacuum in which no country is willing and able to set the international agenda, is widely accepted by policymakers and thought leaders.

A prolific writer, Ian is the author of eleven books, including the New York Times bestseller "Us vs Them: The Failure of Globalism" which examines the rise of populism across the world. His forthcoming book "The Power of Crisis: How Three Threats—and Our Response—Will Change the World" comes out on May 17 and is available for preorder now. He also serves as the foreign affairs columnist and editor at large for Time magazine. He currently teaches at Columbia University's School of International and Public Affairs and previously was a professor at New York University.

Ian earned a master's degree and a doctorate in political science from Stanford University, where he went on to become the youngest-ever national fellow at the Hoover Institution. He received his bachelor's degree in international relations from Tulane University.

Ian established Eurasia Group with just \$25,000 in 1998. Today, the company has offices in New York, Washington, San Francisco, London, Brasilia, Sao Paulo, Singapore, and Tokyo, as well as a network of experts and resources in 90 countries.

FEE AND EXPENSES:

\$106,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations (2 nights), and reasonable meals and incidentals for two.

VIEW CLIP(S):

[Global Perceptions of the U.S., Foreign Policy and the Geopolitical Environment](#)
[Ian Bremmer on What the War in Ukraine Means for the World Order](#)
[Speech Clip - Transatlantic Relationships and The Rise of China](#)
[TEDxOxford: The Rise of the Different](#)

WEBSITE:

www.wsb.com/speakers/ian-bremmer/



ALEX HONNOLD

First Climber to free climb Yosemite's 3,000 ft. El Capitan Wall.

Alex is a professional adventure rock climber whose audacious free-solo ascents of America's biggest cliffs have made him one of the most recognized and followed climbers in the world. He is also the fearless star of National Geographic's hit "Free Solo," which won an Oscar for Best Documentary.

A gifted but hard-working athlete, Alex "No Big Deal" Honnold is known as much for his humble, self-effacing attitude as he is for the dizzyingly tall cliffs he has climbed without a rope to protect him if he falls. Honnold has been profiled by 60 Minutes and the New York Times, featured on the cover of National Geographic, appeared in international television commercials and starred in numerous adventure films including the Emmy-nominated "Alone on the Wall."

Honnold is sponsored by The North Face, Black Diamond, La Sportiva, Goal Zero, Stride Health, and Maxim Ropes. He is the founder of the Honnold Foundation, an environmental non-profit. And to this day, he maintains his simple "dirtbag-climber" existence, living out of his van and traveling the world in search of the next great vertical adventure. \$114,000.00 plus fully refundable, unrestricted business class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

FEE AND EXPENSES:

VIEW CLIP(S):

[How I climbed a 3,000-foot vertical cliff -- without ropes | Alex Honnold Speaking Reel | Alex Honnold](#)



BARBARA CORCORAN

Founder of The Corcoran Group & Shark on ABC's "Shark Tank"

From humble beginnings to the fast and furious New York City real estate market, Barbara Corcoran shares her story of success with audiences and provides insight on what it takes to lead teams to greatness and grow their business.

After failing at 22 jobs, Barbara Corcoran borrowed \$1,000 from a boyfriend, quit her job as a diner waitress, and started a tiny real estate office in New York City. Using the unconventional lessons she learned from her homemaker mom, she gradually built a \$6 billion dollar business, The Corcoran Group. Highly motivational and sensationally entertaining, Barbara Corcoran's recipes for success are chock-full of real life lessons. Not to be missed!

FEE AND EXPENSES:

\$137,300.00 plus a glam buyout. (Travel expenses and a teleprompter are included in the fee.)

VIEW CLIP(S): [Speech Clip - Stand Up and Get Counted](#)
[Speech Clip - TEDxBarnardCollege: Rethinking Failure](#)

WEBSITE: www.wsb.com/speakers/barbara-corcoran/



SHAUN WHITE

Sports Icon, Athlete, and Entrepreneur

Shaun White is a dual-sport professional athlete who maintains some of the highest accolades within snowboarding and skateboarding. Off the board, Shaun has also achieved major accomplishments in the business world through clothing lines, signature products, music festivals, and brand partnerships.

Despite being born with a congenital heart defect, Shaun started snowboarding at age six and immediately showed an uncanny talent for the sport. By seven, Shaun had not only won a series of snowboarding competitions and landed a sponsorship with Burton but also caught the eye of Tony Hawk at a San Diego skate park. Throughout the years, Shaun has amassed numerous titles and victories, most notably 3 Winter Olympic gold medals in 2006, 2010 and 2018 where he earned the 100th gold medal. He is the only athlete with two perfect 100 scores. In 2003 he became the first athlete ever to compete and medal in both the Summer and Winter X Games, where he holds the record for gold medals with 15 and the highest overall medal count with 23. He won 10 ESPY awards for Best Male Action Sports Athlete and Best Male US Olympic Athlete.

FEE AND EXPENSES:

\$126,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for two.

VIEW CLIP(S): [Shaun White Unfiltered | Forbes](#)
[Speaking Demo](#)

WEBSITE: [TIME: 10 Questions for Shaun White](#)
www.wsb.com/speakers/shaun-white/

TIM TEBOW



Nationally-Acclaimed Quarterback; Analyst for ESPN; Bestselling Author.

A two-time national champion, first round NFL draft pick, and Heisman trophy winner, Tim Tebow has overcome obstacles to successfully pursue his dreams. With practical wisdom, he passionately shares the highs and lows of his journey to encourage audiences to tackle fear and stay grounded in order to achieve personal excellence.

Tim Tebow is a two-time national champion, first-round NFL draft pick and Heisman Trophy winner. In addition, he serves as a college football analyst for ESPN. Tebow is the author of three New York Times Best Selling books; *Through My Eyes*, which was named the #1 sports and religion book of 2011 and *Shaken: "Discovering your True Identity in the Midst of Life's Storms"* which released in 2016 and won the 2017 Evangelical Christian Publishers Association Book of the Year. Tebow released his third New York Times bestseller, *This Is The Day*, in September of 2018.

Tim Tebow grew up the son of missionaries and has returned to the Philippines several times throughout his life to spread God's word, and do the Lord's work by serving the needy. The Tim Tebow Foundation was established in 2010 with the goal to bring Faith, Hope and Love to those needing a brighter day in their darkest hour of need. The foundation fulfills this mission every day by making dreams come true for children with life-threatening illnesses, building Timmy's Playrooms in children's hospitals, providing life-changing surgeries to children of the Philippines through the Tebow CURE Hospital, sponsoring Night to Shine, a nationwide prom for people with special needs, providing care for orphans in four countries and adoption aid grants for families who choose to adopt an international child with special needs.

FEE AND EXPENSES:

\$136,000.00 plus ground transportation (event city), hotel, meals and incidentals for up to four. (Airfare and home city ground transportation included in fee above).

VIEW CLIP(S):

[Tim Tebow - Speaking Reel 2020](#)

[Tim Tebow Says: Ask Yourself These 2 Questions Every Day To Win In The Workplace](#)

[Rapid-Fire Questions with Tim Tebow | WebMD](#)

[Coronavirus in Context: Insights from Tebow on Sports & Resilience During COVID](#)

[Tim Tebow and John Whyte, M.D. on Facing Adversity](#)

[Tim Tebow and John Whyte, M.D. on Living a Life of Significance](#)

[Tim Tebow and John Whyte, M.D. on the Impacts of Summer Sports](#)

WEBSITE:

www.wsb.com/speakers/tim-tebow/

TONY HAWK

Skateboarding Legend, Entrepreneur, Philanthropist



Legendary skateboarder Tony Hawk, a pioneer of social media, philanthropist, successful entrepreneur, and the first skater to ever land a 900, talks about his experience creating authentic brands and giving back.

Tony Hawk became the 12-time world champion, 16-time X Games medalist, and first skateboarder to land a 900 through his relentless attitude and unwavering focus. Always authentic, always on the cutting edge of the sport, forever inventing his own way of accomplishing what had yet to be created. As a businessman, philanthropist and video game character, he has applied those same qualities while forging ahead through his career as an unlikely CEO. Learn how Tony has embraced technology, social media and his own gut sense of doing things authentically and remaining true to what brought him here in the first place; skateboarding.

FEE AND EXPENSES:

\$63,500.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

VIEW CLIP(S):

[Building A Brand Around Skateboarding](#)
[Building Your Fan Base Organically](#)
[Speech Clip - The Importance of Authenticity](#)
[The Genesis of The Tony Hawk Foundation](#)
[Tony Hawk's Social Media Awakening](#)
www.wsb.com/speakers/tony-hawk/

WEBSITE:



MARK KING

CEO of Taco Bell

As Chief Executive Officer of Taco Bell Corp., Mark King is responsible for driving overall brand strategy and performance of the business in the U.S. and internationally. Drawing on his retail experience and track record of driving innovation, brand relevance, and culture, King accelerates the innovation, sales growth, and unique brand identity that makes Taco Bell a Category of One.

Before joining Taco Bell, King served as president of adidas North America from 2014-2018. Under his leadership, adidas market share doubled in under three years and sales tripled in four years. In addition, King cultivated new energy for the company's culture resulting in double the number of employees at adidas, an industry-shattering retention rate, the highest employee net promoter score in the company, and more than 500,000 job applications in one year.

Prior to adidas, King spent 34 years at TaylorMade, quickly rising from a territory sales representative to president of TaylorMade in 1999 and CEO

in 2002. During King's tenure as president and CEO, TaylorMade became the leading and most profitable golf company in the world, catapulting the business from \$300 million to more than \$1.85 billion in sales.

Learned from his nearly 40-year career, King believes in creating the right atmosphere to unleash the potential of people to make extraordinary breakthroughs happen. As a leader, he steers with a belief system based in keeping a growth mindset, investing in people, and encouraging an innovative culture to achieve success.

In 2017, Footwear News honored King with the number one spot on their Power 100 list and in 2016 they named him "Person of the Year." Also, in 2017 and 2016, King was named "Executive of the Year" by the Portland Business Journal. He served as the chairman of the National Golf Foundation and was consistently named as one of the ten most power people in golf during his years at TaylorMade-adidas Golf.

King currently serves on the Board of Directors for the V Foundation Victory Over Cancer. Together with his daughters, he has also raised more than \$10 million for children charities around the world through their OneKind Foundation.

King graduated from University of Wisconsin – Green Bay with a bachelor's degree in Business Administration.

FEE AND EXPENSES:

\$41,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

VIEW CLIP(S):

[Do You Really Understand Your Customer?](#)
[Lessons in Leadership: How to Compete in Business Today](#)
[Mark King on Embracing Disruption to Drive Success](#)
[Mark King on How to Celebrate Success and Inspire Employees to Create](#)
[Mark King on Leading the Next Generation](#)
[Mark King: The Power of Belief in the Formula for Success](#)
[Mark King: Can Ordinary People Do Extraordinary Things?](#)
[Speech Clip - Change the Rules of the Games](#)
[Speech Clip - Create an Environment that Allows Creativity](#)
[Speech Clip - Why Do CEOs and Organizations Fail?](#)
[Unleashing the Potential of People](#)
www.wsb.com/speakers/mark-king/

WEBSITE:

ALAN MULALLY

Former President & CEO, Boeing Commercial Airplanes, Boeing Information, Space and Defense Systems, and The Ford Motor Company



Renowned for his strategic and operational leadership and working together, Alan Mulally transformed a struggling Ford Motor Company into one of the world's leading automobile companies and the #1 automobile brand in the United States. Mulally led the transformation of Boeing into the #1 commercial airplane company and aerospace company in the world.

Named #3 on *FORTUNE*'s list of "World's Greatest Leaders," and one of "The World's Most Influential People" by *TIME* magazine, Alan Mulally's leadership as president and CEO of The Ford Motor Company has been hailed by consumers and industry experts alike.

In 2006, Ford suffered a 12.7 billion dollar loss and a significant degradation in their stock-value. With Mulally's leadership to formulate a compelling vision, comprehensive strategy, and a relentless implementation plan, Ford was able to develop a world class product line of cars and trucks with ever increasing productivity, and to deliver profitable growth for all the company's stakeholders. Today, Ford is one of the world's leading automobile companies and the #1 automobile brand in the United States.

Mulally examines strategic and operational leadership and "working together" teamwork principles, practices and management system. Mulally encourages them to explore their own set of working together skills as applicable to their industry and particular organization.

Prior to joining Ford, Mulally served as executive president of The Boeing Company, president and CEO of Boeing Commercial Airplanes and of Boeing Information, Space, and Defense Systems. He has additionally been named one of the 30 "World's Best CEO's" by *Barrons'* magazine, and "Chief Executive of the Year" by *Chief Executive* magazine. Mulally has been honored with the American Society for Quality's medal for executive leadership, the "Automotive Executive of the Year", and the "Thomas Edison Achievement Award". In 2016, Mulally was inducted into The Automotive Hall of Fame. Mulally previously served on President Obama's United States Export Council.

FEE AND EXPENSES:

\$151,000.00 plus expenses for two to include hotel (one bedroom suite), meals and reasonable incidentals (airfare and ground transportation are included in fee).

VIEW CLIP(S):

[Alan Mulally Has a Great Story About His First Day at Ford](#)
[Alan Mulally on the Importance of Feedback](#)
[Boeing Flight Path Oral History: Alan Mulally](#)
[Corporate Culture: Leading Change](#)
[CUNA ACUC DeCarlo Q&A with Alan Mulally \(CEO Ford & Boeing\)](#)
[Speech Clip - Visibility: Knowing Where the Red Is](#)
[Speech Clips - The Brand is the Most Important Thing](#)
www.wsb.com/speakers/alan-mulally/

WEBSITE:



ALEX GORSKY

Executive Chairman of Johnson & Johnson

Alex Gorsky is Executive Chairman of Johnson & Johnson, and one of just seven leaders to have served in the dual role of Chairman and Chief Executive Officer since the company was listed on the New York Stock Exchange in 1944.

Alex began his Johnson & Johnson career as a sales representative with Janssen Pharmaceutica in 1988. Over the next three decades, he advanced through positions of increasing responsibility in sales, marketing, and management, culminating in being named CEO and Chairman in 2012.

Under his leadership, Johnson & Johnson became an industry leader in areas including oncology, immunology, and digital surgery, and reimagined how one of the world's most iconic companies could meet the healthcare needs of families around the globe. During Alex's tenure, record levels of R&D investment, including \$14.7 billion in 2021 alone, as well as hundreds of acquisitions and partnerships contributed to significant growth across its Medical Devices, Pharmaceutical, and Consumer Health sectors. As part of Johnson & Johnson's commitment to serving more than a billion people each day, Alex also oversaw significant breakthroughs in public health, including the successful deployment of an Ebola vaccine in Africa and the development of the Janssen single-shot COVID-19 vaccine in just 13 months.

During Alex's time as CEO, Johnson & Johnson was consistently recognized as one of the most innovative and best-managed companies in the world—featured on the list of Fortune's Most Admired Companies in each year of his tenure, recognized as a "Most Innovative Company" by Fast Company, repeatedly named to Fortune's "Change the World" list, and ranked as the #1 best-run healthcare company in The Wall Street Journal Management Top 250 since its inception in 2017. Alex continually promoted a more diverse and inclusive culture at Johnson & Johnson, serving as the driving force behind many of the company's DE&I initiatives, including a \$100 million pledge to fight health inequities faced by communities of color in the United States.

Outside Johnson & Johnson, Mr. Gorsky's influence has shaped both the healthcare landscape and the greater business community through his work as a member of the Business Roundtable and the Business Council Executive Committees. Among other accolades, he has been honored

with the Robert F. Kennedy Human Rights Ripple of Hope Award (2017), the Prix Galien Roy Vagelos Pro Bono Humanum Award (2021), the BENS Eisenhower Award for outstanding contributions to the United States (2021), the Franklin Institute Bower Award for Leadership (2022), and the Distinguished Graduate Award from the U.S. Military Academy at West Point (2022). Alex currently sits on the Board of Directors of Apple, IBM, NewYork-Presbyterian Hospital, the Travis Manion Foundation, and Wharton's Board of Advisors.

FEE AND EXPENSES:

After completing his undergraduate education at the U.S. Military Academy at West Point, Mr. Gorsky served six years in the Army, earning the rank of captain, the Ranger tab, and Airborne wings. He earned his MBA from Wharton in 1996. Alex has been married to his wife, Pat, for more than 30 years, and they are the parents to one son, Nick. \$101,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for two.

VIEW CLIP(S):

[Alex Gorsky - Disruption and Innovation in Healthcare | Olin Business School](#)



SIMON SINEK

Renowned Leadership Expert and Author, *Leaders Eat Last*

Described as "a visionary thinker with a rare intellect," Simon Sinek teaches leaders and organizations how to inspire people. With a bold goal to help build a world in which the vast majority of people go home everyday feeling fulfilled by their work, Sinek is leading a movement to inspire people to do the things that inspire them.

Described as "a visionary thinker with a rare intellect," Sinek is a trained ethnographer and the author of multiple best-selling books:

- The global best seller Start With Why (over 1 million books sold in the U.S. alone)
- *The New York Times* and *Wall Street Journal* best seller Leaders Eat Last
- *The New York Times* and *Wall Street Journal* best seller Together is Better
- Find Your Why: A Practical Guide for Discovering Purpose for You and Your Team
- And his latest book, The Infinite Game, published in 2019

A trained ethnographer, Simon is fascinated by the people and organizations that make the greatest, lasting impact in their organizations and in the world. Over the years, he has discovered some remarkable patterns about how they think, act, and communicate and the

environments in which people operate at their natural best. He has devoted his life to sharing his thinking in order to help other leaders and organizations inspire action.

Simon may be best known for popularizing the concept of WHY in his first TED Talk in 2009. It rose to become one of the most watched TED talks of all time, with over 43 million views and subtitled in 48 languages. His interview on Millennials in the workplace broke the Internet in 2016, garnering over 200 million views in the first month. This led to Simon being YouTube's fifth most searched term in 2017.

His unconventional and innovative views on business and leadership have attracted international attention. From American Airlines to Disney and MARS, from big business to entrepreneurs to police forces, Simon has been invited to meet with an array of leaders and organizations in nearly every industry. He has also had the honor of sharing his ideas at the United Nations, the United States Congress, and with the senior-most leaders of the United States Air Force, Marine Corps, Navy, Army, and Coast Guard.

With a vision to change the way businesses think, act, and operate, Simon has partnered with Ernst & Young to develop products and services to help many companies transform their businesses. He is an adjunct staff member of the RAND Corporation, one of the most highly regarded think tanks in the world. He is also active in the arts and in the non-for-profit world (Simon prefers to call it the for-impact world).

FEE AND EXPENSES:

\$141,000.00 plus event city ground transportation, hotel accommodations and reasonable meals and incidentals for up to four

VIEW CLIP(S):

[Talks at Good: "The Finite and Infinite Games of Leadership"](#)
[TEDTalks: Why good leaders make you feel safe](#)



MARILLYN HEWSON

Former Chairman, President and CEO, Lockheed Martin

Marillyn Hewson served as Chairman, President and CEO and led Lockheed Martin from 2013 to June 2020 through a period of consistent financial performance and impressive growth. During her seven-year tenure, she increased Lockheed's share price near 300% on the growth of programs like the F-35 Joint Strike Fighter, expansive tactical and strike weapons sales and new markets like hypersonic weapons. During her 38 years at Lockheed Martin, Hewson held executive positions of increasing responsibility with the corporation and has more than three decades of financial responsibility and international operations experience. Hewson forged a \$9 billion acquisition of Sikorsky, the maker of Black Hawk helicopters; and expanded into emerging technologies such as hypersonic missiles, leading Lockheed to win billions of dollars in new contracts. She

has also masterfully led the company navigating conflicts in Syria and national security threats — both on the ground, in space, and in cyberspace — from North Korea, Russia and China in recent years.

Hewson's performance as a business leader has earned her global accolades. In 2019, TIME magazine identified Hewson as one of the "100 Most Influential People in the World," and FORTUNE magazine ranked her No. 1 on its list of "50 Most Powerful Women in Business" for the second year in a row. In 2018, she was named the "CEO of the Year" by Chief Executive magazine, a Top 10 "Businessperson of the Year" by FORTUNE magazine, and one of the "World's 100 Most Powerful Women" by Forbes.

Hewson has an extensive history of sustainability leadership, and leading growth and innovation at a Fortune 100. As Chairman, CEO, and President of Lockheed Martin, Hewson oversaw initiatives for energy and environmental stewardship, including Go Green, carbon and energy reduction, and water use reduction, and partnered with the United States Department of Energy's Better Plants Program, and the Environmental Protection Agency's ENERGY STAR Program and Green Power Partnerships.

Hewson's expertise extends to executive and operational leadership in a global, regulated industry; insight and experience in global business management, strategic planning, cybersecurity, finance, supply chain, leveraged services and manufacturing; and expertise in government relations and human capital management.

She serves of the Board of Directors for Chevron Corporation, Johnson & Johnson, and green construction technology company, Nexii Building Solutions Inc. She previously served on the Board of Directors for DuPont, DowDuPont Inc., and Lockheed Martin Corporation.

Hewson is a member of the University of Alabama's President's Cabinet and a proud supporter of the University of Alabama.

FEE AND EXPENSES:

\$101,000.00 plus first class expenses for two, to include cash equivalent of fully refundable, unrestricted first class airfare for two, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations (subject to speaker's approval), and reasonable meals and incidentals for two.

VIEW CLIP(S):

[Marillyn Hewson on Artificial Intelligence & Cybersecurity](#)
[Marillyn Hewson on National Security](#)
[Marillyn Hewson on Prioritizing Fundamental Core Values](#)
[Marillyn Hewson on the Importance of Listening as a Leader](#)
[Marillyn Hewson on the Qualities of Leadership](#)
[Marillyn Hewson on Women in Leadership Roles](#)

WEBSITE:

www.wsb.com/speakers/marillyn-hewson/



OSCAR MUNOZ

Executive Chairman (ret.) & Former CEO, United Airlines; Board Member of Salesforce, CBRE, TelevisaUnivision, and Archer Aviation; Independent Trustee on Fidelity's Equity & High-Income Funds Board; Member of the Pentagon's Defense Business Board; Member of the Board of Trustees at the Brookings Institution; Trustee of the University of Southern California

Oscar Munoz has served as executive chairman of the board of directors of United Airlines Holdings Inc. since May 2020. He previously served as the company's Chief Executive Officer from September 2015 until his Executive Chairman appointment. Mr. Munoz has served on the board of directors of United Airlines Holdings Inc. since 2010, and he served on the board of directors of Continental Airlines Inc. from 2004 to 2010. He currently serves on the board of directors for CBRE Group Inc. and Univision Holdings Inc., and sits as an independent trustee on Fidelity's Equity & High Income Funds Board. Prior to United, Mr. Munoz served as President and Chief Operating Officer of CSX Corporation, a railroad and intermodal transportation services company, from February 2015 to September 2015; as Executive Vice President and Chief Operating Officer of CSX from 2012 to 2015; and as Executive Vice President and Chief Financial Officer of CSX from 2003 to 2012. He also served on the board of directors of CSX from February 2015 to September 2015.

Oscar Munoz served as CEO of United Airlines from 2015-2020, and eventually retired as Executive Chairman in 2021.

Oscar took the helm of a United that was flying through very turbulent skies, and was anything but United. A stalled merger, dismal operational and financial performance, tortured labor relations and rock-bottom customer satisfaction and employee morale meant United was in freefall.

Within five years, United was flying high, achieving top-tier reliability and profits, winning back customer loyalty and earning the praise of each of its major union leaders. Most importantly, frontline employees were finally flying together as a team, after the turmoil of a merger that finally was ratified eight years to the day after it was begun.

Oscar credits his employees for pulling off the airline comeback story of all time, and it began with a Wall Street-defying strategy to put employees first, as the foundation of rebuilding.

Behind the scenes, another personal drama was unfolding. On Day 37 of his tenure, he suffered a massive heart attack. He woke from a coma only to fight for his job, fend off a proxy battle from activist investors, manage PR crises, all while learning the three-dimensional chess game that is required to obtain a heart transplant.

As CEO, then Chairman, he also helped lead negotiations for the CARES Act, and helped marshal the airline sector response to Covid.

Today, Oscar remains beloved by the global employee base that makes up the United Airlines family for his authenticity, faith in his employees, and for turning the company around by creating a New Spirit of United.

FEE AND EXPENSES:

\$101,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

VIEW CLIP(S):

[Oscar Munoz In Conversation - The CEO Board Relationship](#)

[Oscar Munoz on Building Trust](#)

[Oscar Munoz on Connecting People](#)

[Oscar Munoz on Finding Purpose in a Health Challenge](#)

[Oscar Munoz on the Importance of Effective Leadership](#)

WEBSITE:

www.wsb.com/speakers/oscar-munoz/



STEPHANIE CHUNG

Founding Chief Growth Officer & Current Global Brand Ambassador, Wheels Up

A trailblazing voice, Stephanie Chung empowers corporate, sales, and women leaders to reach new heights through powerful personal stories, lessons learned, and proven strategies from her decades-long career.

The first African American president of a major private aviation company, Stephanie Chung is a widely recognized trailblazer in the aviation industry. Chung joined Wheels Up, one of the largest private aviation companies in the world, as the company's founding Chief Growth Officer in 2020 and became their Global Brand Ambassador in 2022.

Stephanie's insights come from an over 30-year career, marked by her success as a high-ticket sales closer and catalyzing transformative growth in the organizations she has led. She brings electrifying energy, practiced science, and tested wisdom to the stage as she dives into top-of-mind issues in leadership, sales, business growth, and women in leadership. With her inspirational personal stories, proven strategies, and bold approach, audiences will laugh, learn, and be motivated to make impactful changes.

Stephanie's journey began when she was just a young girl. As the daughter of an Air Force officer, Stephanie often moved from base to base. She had direct sight into the discipline and expectations of US troops. Through these formative experiences, she learned three crucial things that would guide the course of her life: Her love for aviation, a high

standard of excellence, and lastly, how to adapt and connect with people of all different backgrounds.

As she climbed her career ladder, Stephanie chanced upon Judith E. Glaser's work on Conversational Intelligence®. Struck by the connections between Glaser's findings and her work in sales and leadership, they collaborated to develop "Neuroscience Selling," a groundbreaking approach to sales technique.

At Wheels Up, Stephanie found creative ways to generate revenue through new client acquisitions and growing a diverse membership base by targeting corporations, associations, executives, entrepreneurs, and sports and entertainment personalities as the next generation of private flyers, building loyalty and preference among diverse customer segments – women, LGBTQ+, and people of color.

Prior to her role at WheelsUp, Stephanie successfully repositioned JetSuite from a commodity service to a luxury customer experience, upgrading the fleet and elevating the client experience. She also served as VP of Sales for Flexjet, overseeing a sales organization and strategic deal team that generated over \$835 million in revenue. Prior, she held influential roles at US Airways (now operating as American Airlines), Delta Air Lines, and Bombardier.

In addition to her work with Wheels Up, Stephanie currently serves as a member of c200, a community of the most successful women in business. She is also a member of the Advisory Council of the National Business Aviation Association and the Advisory Board of the Texas Commission on Law Enforcement. For her achievements, she has been recognized in D CEO Magazine's Top 500 and included in the Ebony Power 100.

FEE AND EXPENSES:

\$34,250.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

VIEW CLIP(S):

[Stephanie Chung - You Are a Salesperson and You Are an Interior Designer](#)
[Neuroscience Selling TV](#)
[Neuroscience Selling to Executive Coaches](#)
[Women in Aviation - Keynote](#)
[Stephanie Chung on Empowering Women](#)
[Stephanie Chung on Neuroscience Leadership](#)
[Stephanie Chung on Neuroscience Selling](#)

WEBSITE:

www.wsb.com/speakers/stephanie-chung/

GEORGE BLANKENSHIP

Former Executive at Tesla Motors, Apple Computer and GAP Inc.



Former Tesla, Apple and GAP Inc. executive, George Blankenship, drives businesses toward innovation and transforms companies from status quo market contenders to forward-thinking and dynamic companies of the future.

Former executive at Tesla Motors, Apple Computer and GAP Inc., George Blankenship brings 30 years of international strategy, retail and real estate experience to his audiences. He most recently disrupted the auto industry, redefined customer engagement, and revolutionized the car-buying experience in his executive role at Tesla Motors. As vice president of real estate at Apple, Blankenship formulated and executed one of the most triumphant retail growth strategies in history and is widely recognized as the architect of Apple's brand-building retail method. Apple saw a material, sustained increase in sales, profit and consumer loyalty due to Blankenship's focus on reformulation of the consumer experience, building brand awareness, and ongoing accessibility to customers.

Blankenship has meaningfully redefined the role of superior customer experience in contemporary markets and knows how to hone and refine corporate values to deeply strengthen customer loyalty. An industry leader and market expert, he brings high-energy and unmatched insight on how companies can build and create brand loyalty, remain competitively positioned in a modern market, and thoroughly equip themselves to deliver first-class customer care. His innovative processes inform and transform secure, status quo organizations into forward-thinking and dynamic players of the future.

FEE AND EXPENSES:

\$51,000.00 plus hotel accommodations and reasonable meals and incidentals for one. *A fixed flat fee is available to cover travel expenses.*

VIEW CLIP(S):

[George Blankenship - Preparing Your Brand for the Future of Retail](#)
[George Blankenship - The Future of Innovation](#)
[George Blankenship on Building Long Term Customer Relationships](#)
[George Blankenship on having an Innovation Mindset](#)
[George Blankenship on Product Innovation](#)
[George Blankenship on Steve and Elon's Leadership](#)
[George Blankenship on The Customer Experience](#)
[George Blankenship: Innovating the Customer Experience Through Tech](#)
[Speech Clip - Creating Long-Term Customer Relationships](#)
[Speech Clip - Stay the Course and Win](#)
[Speech Clip - The Future of Stores in the Age of Connectedness](#)
[Speech Clip - Working With Elon Musk](#)
www.wsb.com/speakers/george-blankenship/

WEBSITE:

LIZ WISEMAN

Executive Strategy and Leadership Expert and Best-Selling Author



*Liz Wiseman is a researcher and executive advisor who teaches leadership to executives around the world. She is the author of New York Times best seller *Multipliers: How the Best Leaders Make Everyone Smarter*, *The Multiplier Effect: Tapping the Genius Inside Our Schools*, and Wall Street Journal bestseller *Rookie Smarts: Why Learning Beats Knowing in the New Game of Work*.*

Liz is the CEO of the Wiseman Group, a leadership research and development firm headquartered in Silicon Valley, California. Some of her recent clients include: Apple, AT&T, Disney, Facebook, Google, Microsoft, Nike, Salesforce, Tesla, and Twitter. Liz has been listed on the Thinkers50 ranking and in 2019 was recognized as the top leadership thinker in the world.

She has conducted significant research in the field of leadership and collective intelligence and writes for Harvard Business Review, Fortune, and a variety of other business and leadership journals. She is a frequent guest lecturer at BYU and Stanford University and is a former executive at Oracle Corporation, where she worked as the Vice President of Oracle University and as the global leader for Human Resource Development. \$54,500.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

FEE AND EXPENSES:

VIEW CLIP(S):

[Speech Clip - Are You a Genius or a Genius Maker?](#)

[Speech Clip - The Perpetual Rookie](#)

[TEDxUniversityofNevada: Living and Working with Child-Like Wonder](#)

WEBSITE:

www.wsb.com/speakers/liz-wiseman/



OZAN VAROL

Rocket Scientist turned Professor, Bestselling Author, and Expert on Creativity and Critical Thinking

Ozan Varol is a rocket scientist turned award-winning professor, #1 bestselling author, and internationally acclaimed speaker. He is one of the world's foremost experts in creativity, innovation, and critical thinking. He helps industry-leading organizations reimagine the status quo with moonshot thinking.

A native of Istanbul, Turkey, Ozan grew up in a family of no English speakers. He learned English as a second language and moved to the United States by himself at 17 to attend Cornell University and major in astrophysics. While there, he served on the operations team for the 2003 Mars Exploration Rovers project that sent two rovers—Spirit and Opportunity—to Mars. Ozan then pivoted and went to law school. He

graduated first in his class, earning the highest grade point average in his law school's history.

Today, thinking like a rocket scientist is a necessity. Learning to embrace uncertainty and the unknown will be the lifeblood of the most successful leaders and organizations for years to come. Those who can tackle these challenges with a mindset that combines extraordinary thinking with a practical, proven moonshot process, will achieve extraordinary results. As Varol poignantly shares in his keynotes, "It is only when we sacrifice the certainty of answers and embrace uncertainty, that breakthroughs happen." As a former rocket scientist, and the Bestselling Author of *Think Like A Rocket Scientist*, there is arguably no one better than Ozan Varol to help audiences understand the process behind Moonshot Thinking, that will ultimately help you imagine the seemingly unimaginable and solve the seemingly unsolvable.

Varol is consistently ranked one of the top speakers at conferences and private events. Audiences love his blend of big ideas, witty stories, and down-to-earth humor. He's a master at simplifying complex topics and delivering numerous "a ha!" moments. Varol has the rare ability to get people to drop their phones and leave them with practical insights they can implement right away to level up in work and life.

Varol's diverse personal background (as a former rocket scientist turned lawyer turned university professor and popular author) allows him to connect with wide-ranging audiences. He's delivered keynote speeches to small and large crowds at conferences, start-ups, and Fortune 500 companies across numerous industries. He's trusted by institutions like Microsoft, Intel, adidas, Accenture, Deloitte, Salesforce, General Electric, Google X, CVS Health, the U.S. Department of State, and the U.S. Navy.

Ozan is the #1 bestselling author of *Think Like a Rocket Scientist: Simple Strategies You Can Use to Make Giant Leaps in Work and Life*. The book has been translated to nearly 25 foreign languages and has received many accolades, including being selected as:

- One of Inc.com's "6 Business Books You Need to Read in 2020 (according to Bill Gates, Satya Nadella, and Adam Grant)"
- One of Amazon's Top 20 business books of 2020
- Adam Grant's # 1 pick of his top 20 leadership books of 2020
- One of 6 Groundbreaking Books of Spring 2020 (according to Malcolm Gladwell, Susan Cain, Dan Pink, and Adam Grant).

FEE AND EXPENSES:

\$31,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.

VIEW CLIP(S):

[How Ozan's Audiences are Applying Moonshot Thinking OnLeadership - Shoot for the Moon: Ozan Varol](#)
[Ozan Varol for Business](#)

[Ozan Varol for Education](#)
[Ozan Varol for Healthcare](#)
[Ozan Varol for Manufacturing](#)
[Ozan Varol: Are You at the Forefront of Change?](#)
[Ozan Varol: Flying in the Face of Uncertainty](#)
[Ozan Varol: Keynote Speaker Reel 2022](#)
[Ozan Varol: Strategy vs. Tactics](#)
[The Secret To Achieving Your Goals In Life | Ozan Varol & Jay Shetty](#)
[X Talks | Ozan Varol Keynote](#)
www.wsb.com/speakers/ozan-varol/

WEBSITE:



MOLLY FLETCHER

CEO, Business Author and Former Sports Agent

Hailed as the “female Jerry Maguire” by CNN, Molly Fletcher inspires audiences to carve their own pathway to success and redefine how they do business.

A trailblazer in every sense of the word, Molly Fletcher shares the business wisdom, relationship brilliance and unwavering optimism that helped her thrive as one of the first female sports agents and now as a successful entrepreneur. Molly’s fearless approach to business is illustrated in the engaging and entertaining stories about her rise to the top as a sports agent, an industry where there are actually more agents than athletes to represent. Always fascinated with how peak performers sustain success, Molly gives rare insight into the minds of some of sports’ biggest stars while sharing personal stories about her journey in a highly competitive, traditionally male-dominated industry.

In her talks, Molly earns rave reviews from audiences, who describe her as “a world-class speaker and businessperson” who is “true-to-life, uplifting and entertaining” and great at “connecting and delivering unique tools that captivate audiences.”

The author of three books, Molly tackles the topic of negotiation in her latest release, *A Winner’s Guide to Negotiating*. In it, she shares the innovative tactics she used to negotiate over \$500 million worth of contracts in the high-stakes, big-ego world of professional sports. She’s been featured in *ESPN*, *The Magazine*, *Fast Company*, *Forbes* and *Sports Illustrated*, and has energized Fortune 500 companies, associations and teams across the country. Engaging, humorous, relatable and high energy, Molly lights a fire in any audience, inspiring fearless growth. \$43,500.00 plus hotel accommodations and reasonable meals and incidentals for one.

FEE AND EXPENSES:

VIEW CLIP(S):

[Molly Fletcher](#)
[Molly Fletcher on Talent vs. Drive](#)

[Molly Fletcher on the Drive to Get Better](#)
[Speech Clip - Act Like You Have the Business](#)
[Speech Clip - Fearless Mindset](#)
[Speech Clip - Grow Your Business](#)
[Speech Clip - The Difference Between Connection and Communication](#)
[TED: Secrets of a Champion Mindset](#)
[TEDxEmory: Unleash Your Potential](#)
www.wsb.com/speakers/molly-fletcher/

WEBSITE:



JEFF IMMELT

Chairman and CEO, General Electric (2001–2017)

Having led an industrial titan through a digital revolution that upended traditional assumptions, former Chairman and CEO of General Electric Jeff Immelt motivates organizations to embrace change and shares firsthand lessons on how to cultivate innovation.

When he took the helm at General Electric, Jeff Immelt knew that in a rapidly digitizing, increasingly interconnected, and predictably unpredictable world, a fundamental paradigm shift would be required if GE was to maintain its dominance and chart the kind of future that could honor its history. He set a new vision and course for what the company could be, transforming what had been a classic conglomerate into what is now considered a 125-year start-up. Immelt left GE more disciplined, resilient, inventive, and forward-focused than it had ever been. Audiences will learn directly from a leader who has navigated volatility and invested in disruption at a scale unprecedented in business. Organizations of all sizes from all industries will gain insight into how to identify the best ideas and act on them by adopting a spirit of curiosity and purpose. Immelt's memoir *Hot Seat: What I Learned Leading a Great American Company* was released in March 2021.

FEE AND EXPENSES:

\$126,000.00 plus private jet transportation, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals.

VIEW CLIP(S):

[Jeff Immelt of GE: Leaders Must Drive Change](#)
[Jeff Immelt Talks About New Imperatives For Leaders || NTLF 2019](#)
[Jeff Immelt The Transformation to a Digital Industrial Company - Talks at GS](#)
[Jeff Immelt: Digitizing the Industrial Space](#)

WEBSITE:

www.wsb.com/speakers/jeff-immelt/

MONTY MORAN

Former Co-CEO at Chipotle Mexican Grill (2009-2016), Lawyer, Author, Pilot & Filmmaker



As the former co-CEO of Chipotle, Monty led the expansion of the brand from 400 to more than 2,500 locations and brought in more than \$23 billion in revenue. His people-first leadership is grounded in the belief that ordinary people, under the right circumstances, can make extraordinary contributions.

Monty's view of effective leadership is unique and refreshing. It's grounded in his belief that ordinary people, in the right environment, are capable of making extraordinary contributions. He's found that people, whether in a law firm of 30 lawyers or a Restaurant chain of 75,000 employees, are capable of leading and making significant creative contributions when they work in a culture that ignites their individual and collective growth.

For Monty, empowerment is not a buzzword. It's not a tactic. It's a way of life. It's part of the non-delegable responsibility of every leader to build relationships with those they hope to influence. After all, Monty reminds us that the only source of a leader's power is that others choose to follow. Earning people's respect requires leaders to love, listen and connect. It requires the kind of vulnerability that is essential to building strong relationships. And, it requires that every person take responsibility for building a culture that causes people to work and play at a high level — consistently.

It was this kind of people-centric leadership that drove Monty's team at Chipotle to grow from 400 restaurants to more than 2,200, each contributing on average over 2.5 million dollars in revenue, and to earn multiples on Wall St. that rival many technology companies.

In his new book, *Love Is Free. Guac Is Extra: How Vulnerability, Empowerment, and Curiosity Built an Unstoppable Team* (2020) and upcoming docuseries, *Connected: A Search for Unity*, Moran explores leading with love, vulnerability, curiosity, and authenticity. He educates leaders to humbly lift up the people around them, noting that the more they do, the more they will be rewarded - professionally, financially, emotionally, and personally. His talks are fun, energetic, interesting, and full of ideas that leaders can actually use to quickly build more engaged teams, and vastly improve results.

Prior to joining Chipotle, Monty was head of litigation and then managing partner and CEO at the Denver-based law firm of Messner and Reeves, LLC, which he led for ten years. Most recently, Monty realized his lifelong dream of becoming a pilot, and flies his airplane throughout the United States to pursue his interest in better understanding and serving Americans, a quest he documents through his startup, Old Tale Productions. In addition, he is a director and chairman of corporate boards, advisor to many entrepreneurs and businesses, a filmmaker, and author.

FEE AND EXPENSES:	\$51,000.00 plus fully refundable, unrestricted first class airfare, plus professional commercially-insured round trip ground transportation (home and event city), hotel accommodations, and reasonable meals and incidentals for one.
VIEW CLIP(S):	Monty Moran - Connected: A Search for Unity Trailer Monty Moran Speaking Reel 2021
WEBSITE:	www.wsb.com/speakers/monty-moran/



PETER DIAMANDIS

Founder and Executive Chairman, XPRIZE Foundation; Executive Chairman, Singularity University and Author

Passionate about solving some of the world's grand challenges, Dr. Peter Diamandis is focused on driving breakthroughs in products, companies, industries—and humanity.

Peter Diamandis is the Chairman and Executive Chairman of the X PRIZE Foundation, which leads the world in designing and launching large incentive prizes to drive radical breakthroughs for the benefit of humanity. Best known for the \$10 million Ansari X PRIZE for private spaceflight and the \$10 million Progressive Automotive X PRIZE for 100 mile-per-gallon equivalent cars, the Foundation is now launching prizes in Exploration, Life Sciences, Energy and Education.

Diamandis is also an international leader in the commercial space arena, having founded and run many of the leading entrepreneurial companies in this sector. As co-Founder & Chairman of the Singularity University, a Silicon Valley based institution partnered with NASA, Google, Autodesk and Nokia, Diamandis counsels the world's top enterprises on how to utilize exponential technologies and incentivized innovation to dramatically accelerate their business objectives. Additionally, Diamandis is the co-founder and vice-chairman of Human Longevity Inc. (HLI), a genomics and cell therapy-based diagnostic and therapeutic company focused on extending the healthy human lifespan.

In his keynote presentations, Diamandis focuses on the importance of innovation and he looks to the future in explaining how exponentially advancing technologies will transform our companies, our industries, our governments and our lives over the next 5 to 10 years. Diamandis is the author of *Abundance: The Future is Better Than You Think* (February 2012) which shows how exponential technologies, coupled with the DIY movement and the on-line connectivity of the “rising billion” will enable an age of global abundance providing water, energy, food, shelter, education and healthcare in unprecedented availability for humanity. He is also the author of *BOLD, How to go BIG, Create WEALTH and Impact the World* (February 2015), a how-to guide for using exponential

technologies, moonshot thinking, and crowd-powered tools to create extraordinary wealth while also positively impacting the lives of billions.

FEE AND EXPENSES: \$76,000.00 plus professional commercially-insured round trip ground transportation.

VIEW CLIP(S): [Speech Clip - TED: Abundance Is Our Future](#)
[TED: Abundance Is Our Future](#)

WEBSITE: www.wsb.com/speakers/peter-diamandis/



Western Riverside Council of Governments Administration & Finance Committee

Staff Report

Subject: 2022 Fee Comparison Analysis Update
Contact: Christopher Tzeng, Program Manager, ctzeng@wrcog.us, (951) 405-6711
Date: December 14, 2022

Requested Action(s):

1. Receive and file.
-

Purpose:

The purpose of this item is to provide an introduction to the 2022 Fee Comparison Analysis Update.

WRCOG 2022-2027 Strategic Plan Goal:

Goal #5 - Develop projects and programs that improve infrastructure and sustainable development in our subregion.

Background:

In 2016 WRCOG conducted a study to analyze fees / exactions required and collected by jurisdictions / agencies in and immediately adjacent to the WRCOG subregion. The study was presented to various WRCOG committees and subsequent presentations were completed to various City Councils in the subregion. Based on the feedback provided and the requests made for data and presentations, WRCOG indicated the study would be updated on a consistent basis to enable jurisdictions the value of understanding the impact of fees on development and the regional economy. An updated analysis utilizing 2018 data was completed at the beginning of 2019. An update to the analysis utilizing data available in 2022 commenced in May 2022.

Overview

The update to the Fee Comparison Analysis is following the same methodology as in 2016 and 2018, and is updating the fee structures of the various fees. The Analysis provides WRCOG jurisdictions with comprehensive fee comparisons. The study also discusses the effect of other development costs, such as the cost of land and interest rates, within the overall development framework. Another key element of this study is an analysis documenting the economic benefits of transportation investment. Summary and comparison data for WRCOG member agencies is provided as Attachment 1.

Fee Comparison Methodology

In addition to the jurisdictions within the WRCOG subregion, the study analyzed sample jurisdictions within the Coachella Valley, San Bernardino County, and the northern portion of San Diego County. The

inclusion of additional neighboring / peer communities allows for consideration of relative fee levels between the WRCOG subregion and jurisdictions in surrounding areas that may compete for new development.

Land Uses and Development Prototypes

Fee comparisons have been conducted for five key land use categories - “development prototypes,” including single-family residential, multi-family residential, office, retail, and industrial developments. Since every development project is different, and because fee structures are often complex and derived based on different development characteristics, it is helpful to have “development prototypes” for each of the land uses studied. The use of consistent development prototypes increases the extent to which the fee comparison is an “apples-to-apples” comparison.

Development prototypical projects that will be analyzed are as follows:

- Single-family residential development: 50-unit residential subdivision; 2,700 square foot homes, and 7,200 square foot lots
- Multi-family residential development: 200-unit market-rate, 260,000 gross square foot apartment buildings
- Retail development: 10,000-gross square foot retail buildings
- Office development: 20,000-gross square foot, Class A or Class B office buildings
- Industrial development: 265,000 gross square foot high-cube industrial buildings

Fee Categories

The primary focus of the analysis is on the array of fees charged on new development to pay for a range of infrastructure / capital facilities. The major categories of fees include 1) school development impact fees; 2) water / sewer connection / capacity fees; 3) city capital facilities fees; 4) regional transportation fees (TUMF in Western Riverside County); and 5) other capital facilities / infrastructure / mitigation fees charged by other regional / subregional agencies. These fees typically represent 80% to 90% of the overall development fees on new development. Additional processing, permitting, and entitlement fees are not included in this analysis. The analysis focuses on development impact fees, as these fees are much larger than planning / processing fees for comparison purposes.

Service Providers and Development Prototypes

The system of infrastructure and capital facilities fees in most California jurisdictions is complicated by multiple service providers and, often, differential fees in different parts of individual jurisdictions. Multiple entities charge infrastructure / capital facilities fees – e.g., city, water districts, school districts, and regional agencies. In addition, individual jurisdictions are often served by different service providers (e.g., more than one water district or school district) with different subareas within a jurisdiction, sometimes paying different fees for water facilities and school facilities. In addition, some city fees, such as storm drain fees, are sometimes differentiated by jurisdictional subareas. To maintain consistency, the service providers utilized in the previous analyses will be utilized. Individual service providers were selected where multiple service providers were present, and an individual subarea was selected where different fees were charged by subarea.

Next Steps

This information was presented to the WRCOG Planning Directors Committee, the Public Works Committee, and the Technical Advisory Committee in October and November 2022. Several member agencies had clarifying questions or requested additional information. Now that the fee comparison information has been disseminated and verified, WRCOG will work with the consultant to finalize the report. The final report will be presented to the WRCOG Executive Committee in February 2023.

Prior Action(s):

November 17, 2022: The Technical Advisory Committee received and filed.

October 13, 2022: The Public Works Committee received and filed.

October 13, 2022: The Planning Directors Committee received and filed.

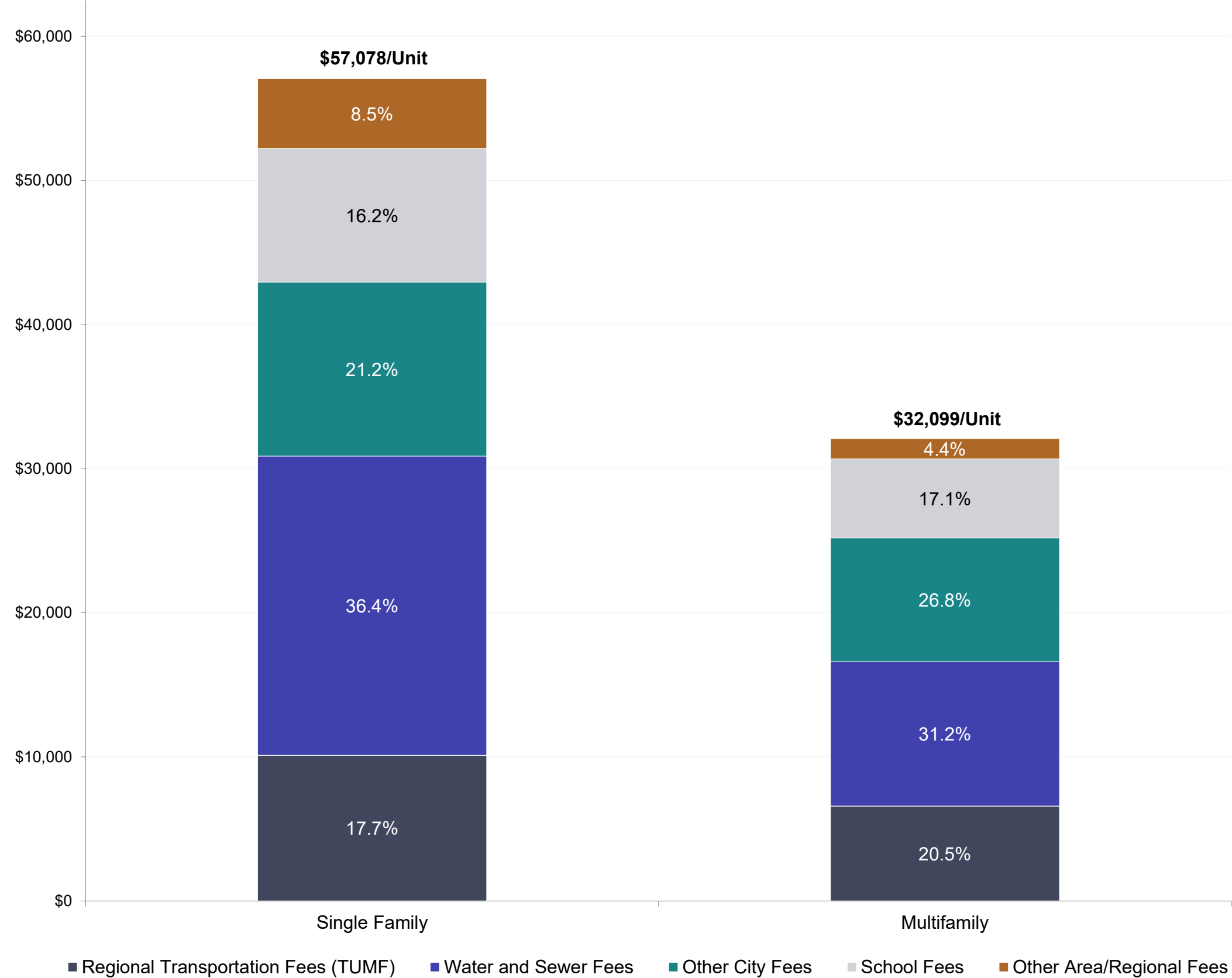
Fiscal Impact:

Transportation and Planning Department activities are included in the Agency's adopted Fiscal Year 2022/2023 Budget under the Transportation Department. This analysis is covered under TUMF (Fund 110) to provide additional information on development fees charged to support the TUMF Nexus Study.

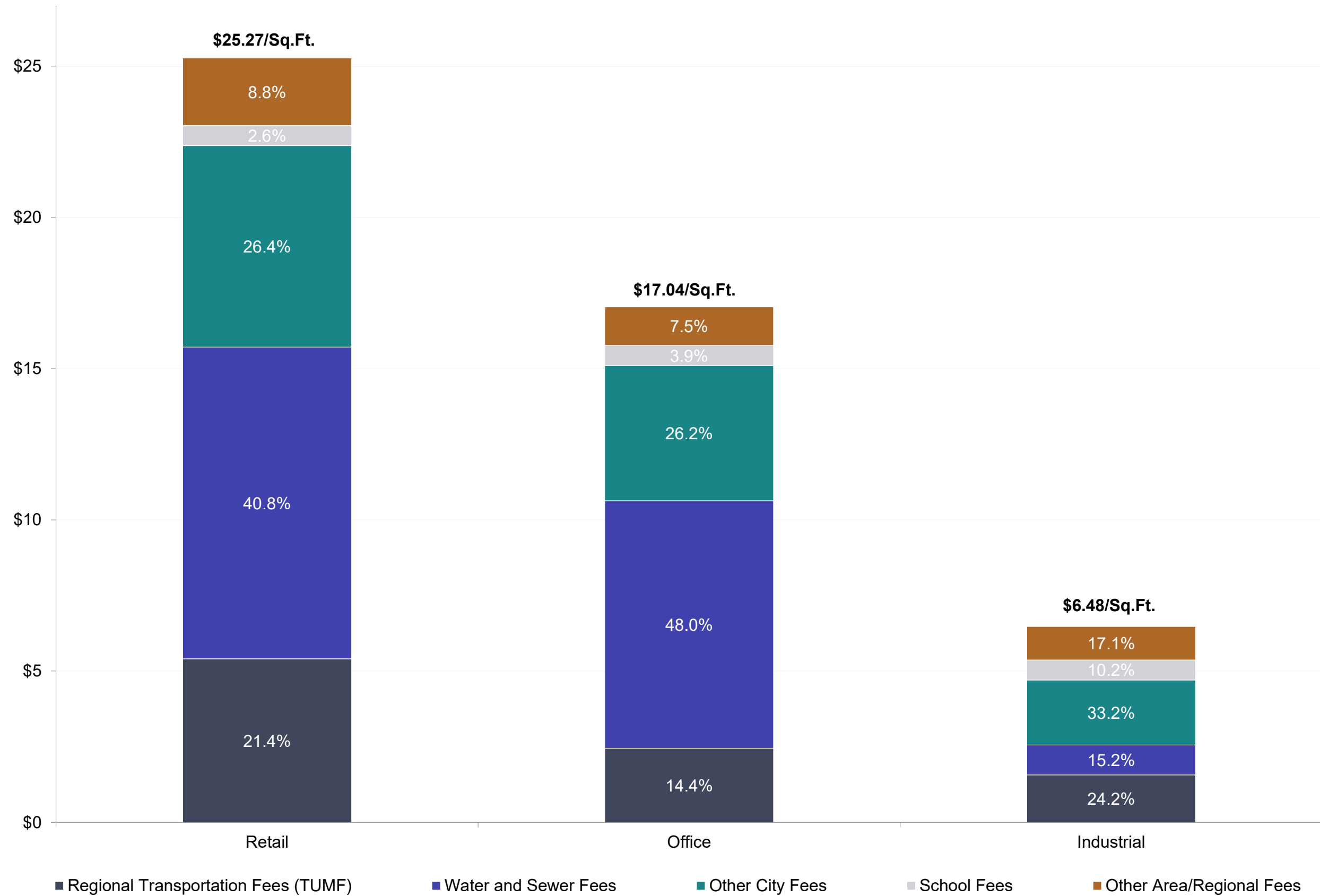
Attachment(s):

[Attachment 1 - WRCOG Fee Charts Compiled](#)

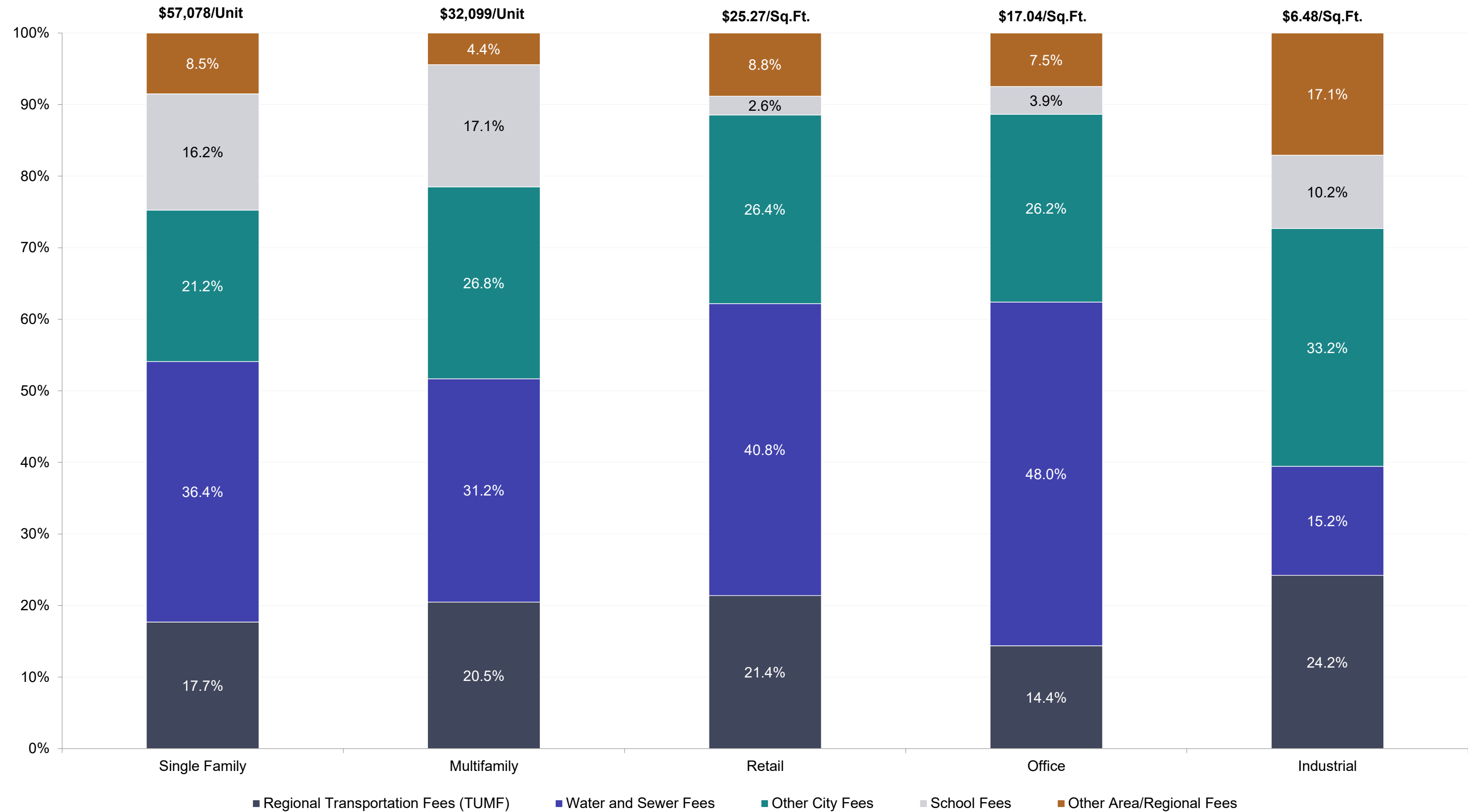
Residential Prototype Average Development Impact Fees for WRCOG Jurisdictions



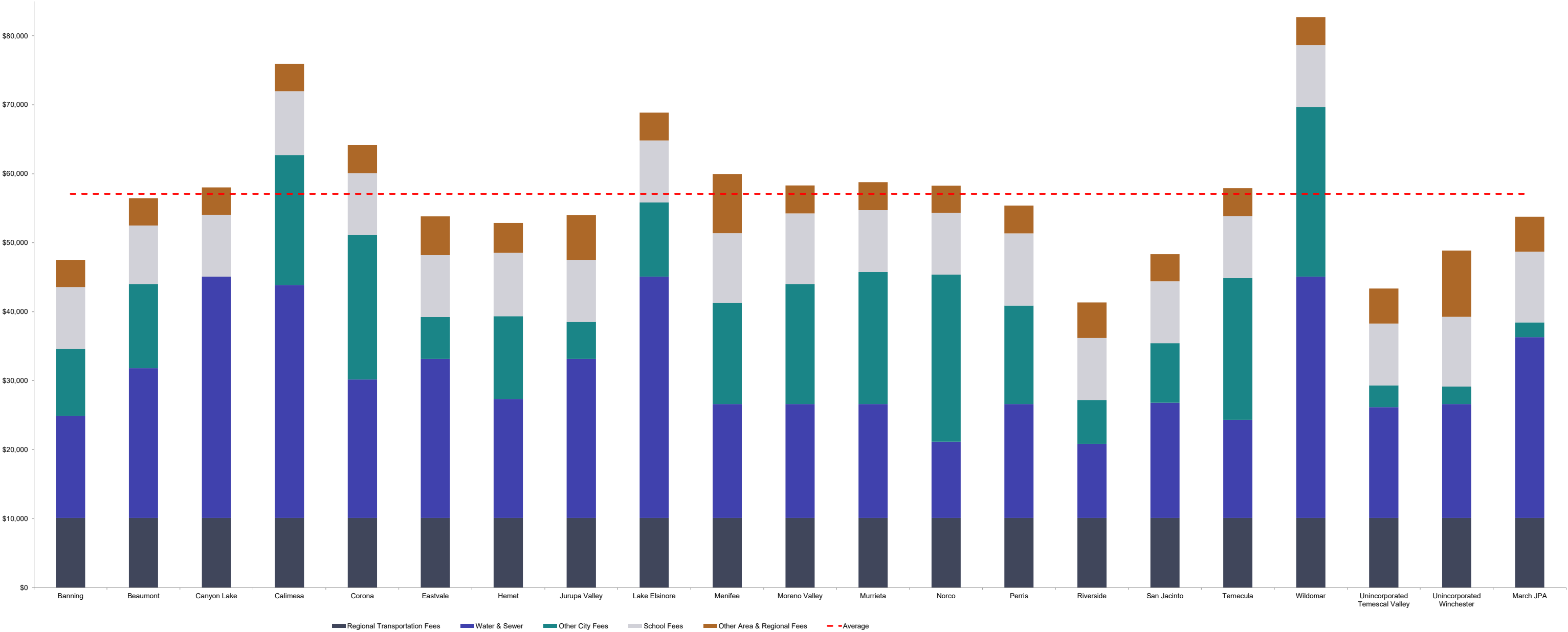
Non-Residential Prototype Average Development Impact Fees for WRCOG Jurisdictions



Development Impact Fee Component Comparison by Prototype for WRCOG Jurisdictions

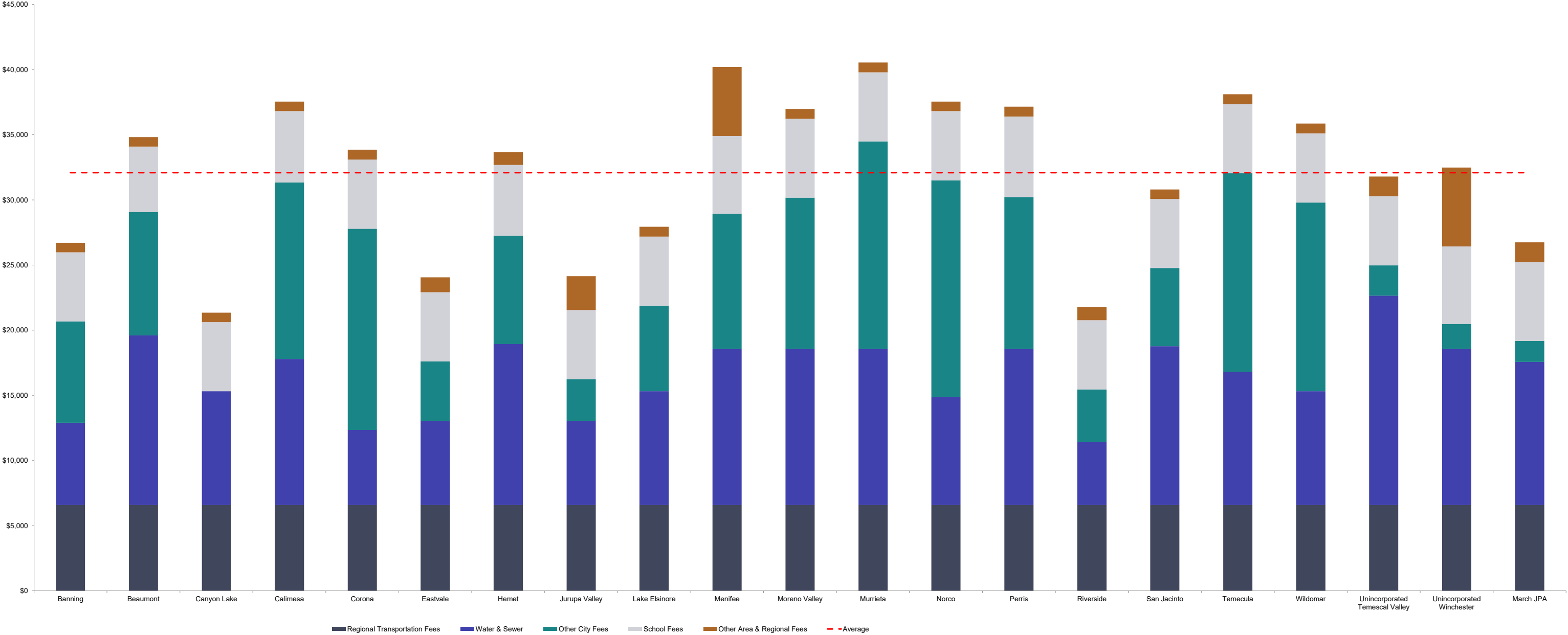


Single Family Prototype
Development Fees by Jurisdiction (Per Unit)



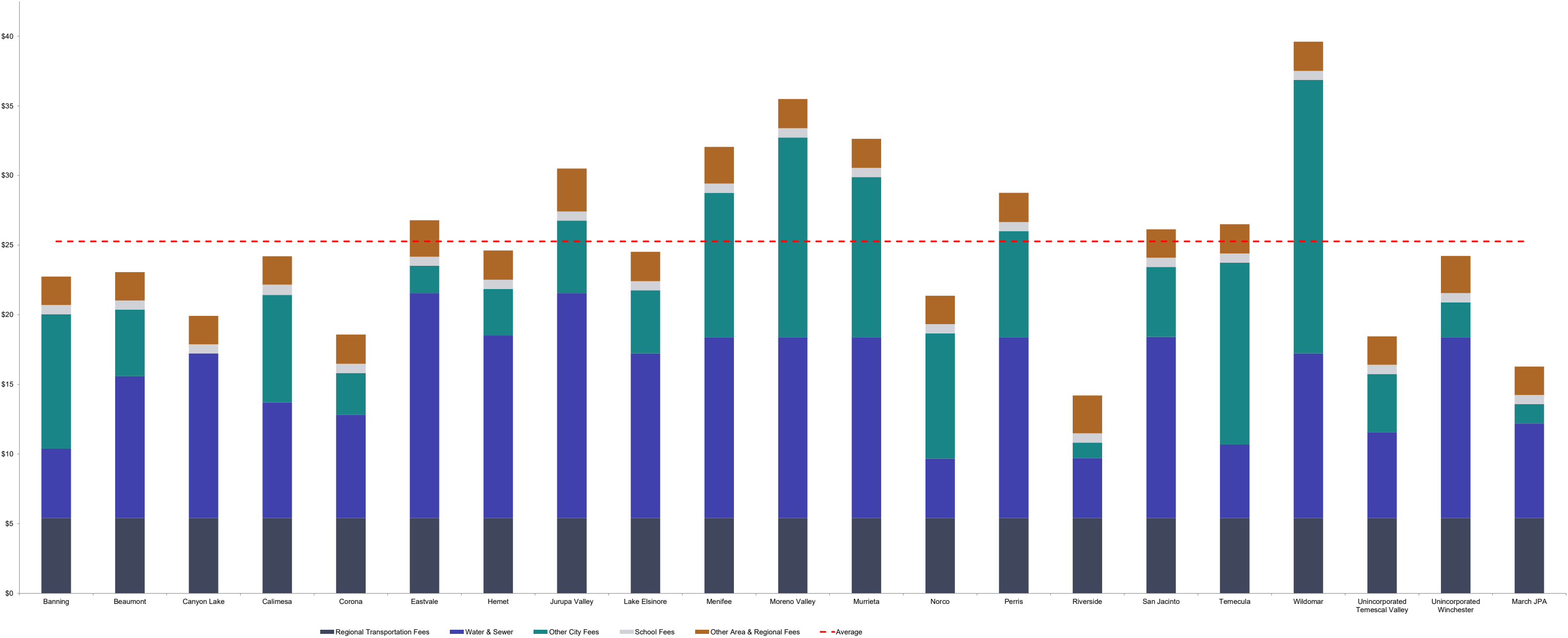
Fee estimates for specified development prototypes as of 2022. Actual fees will vary based on project specifics and any fee updates.
"Other Area Fees/ Regional Fees" include, but are not limited to, regional parks, trails, multiservice center fees, area specific fees, and habitat mitigation fees.

Multifamily Prototype
Development Fees by Jurisdiction (Per Unit)



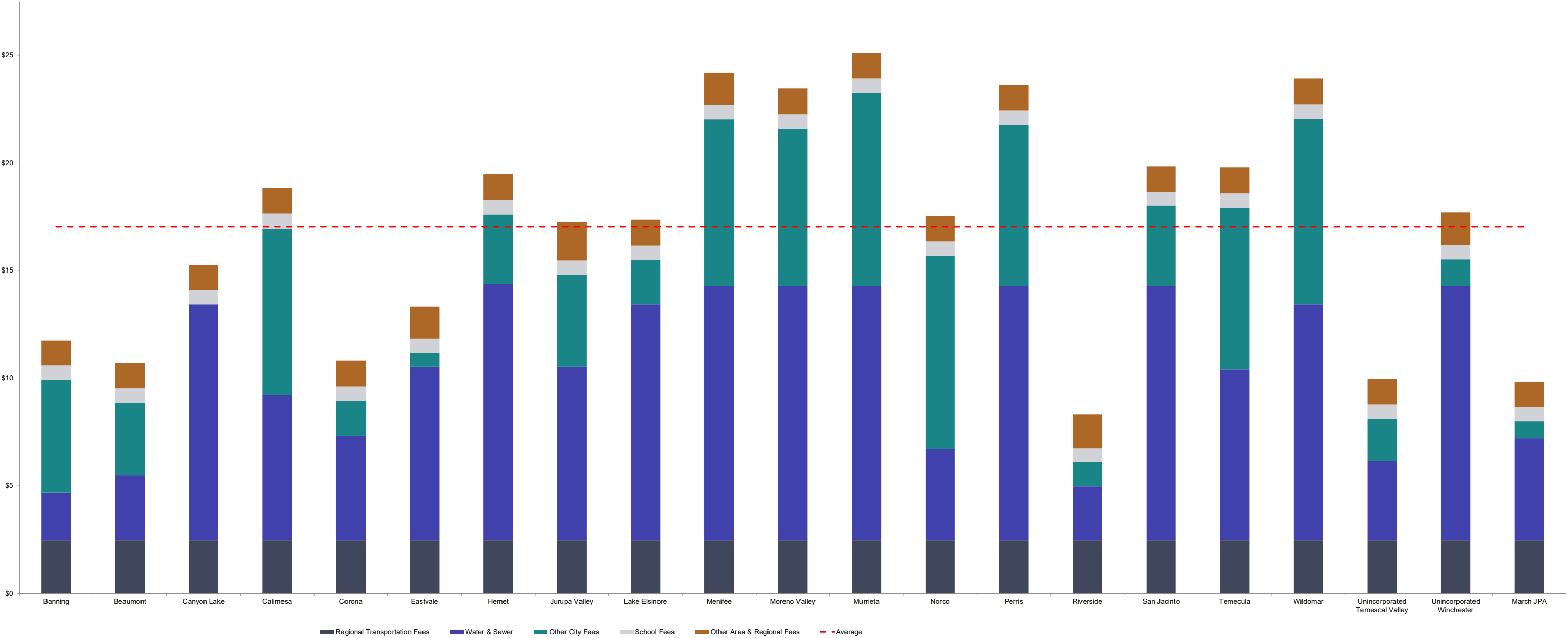
Fee estimates for specified development prototypes as of 2022. Actual fees will vary based on project specifics and any fee updates.
"Other Area Fees/ Regional Fees" include, but are not limited to, regional parks, trails, multiservice center fees, area specific fees, and habitat mitigation fees.

Retail Prototype
Development Fees by Jurisdiction (Per Square Foot)



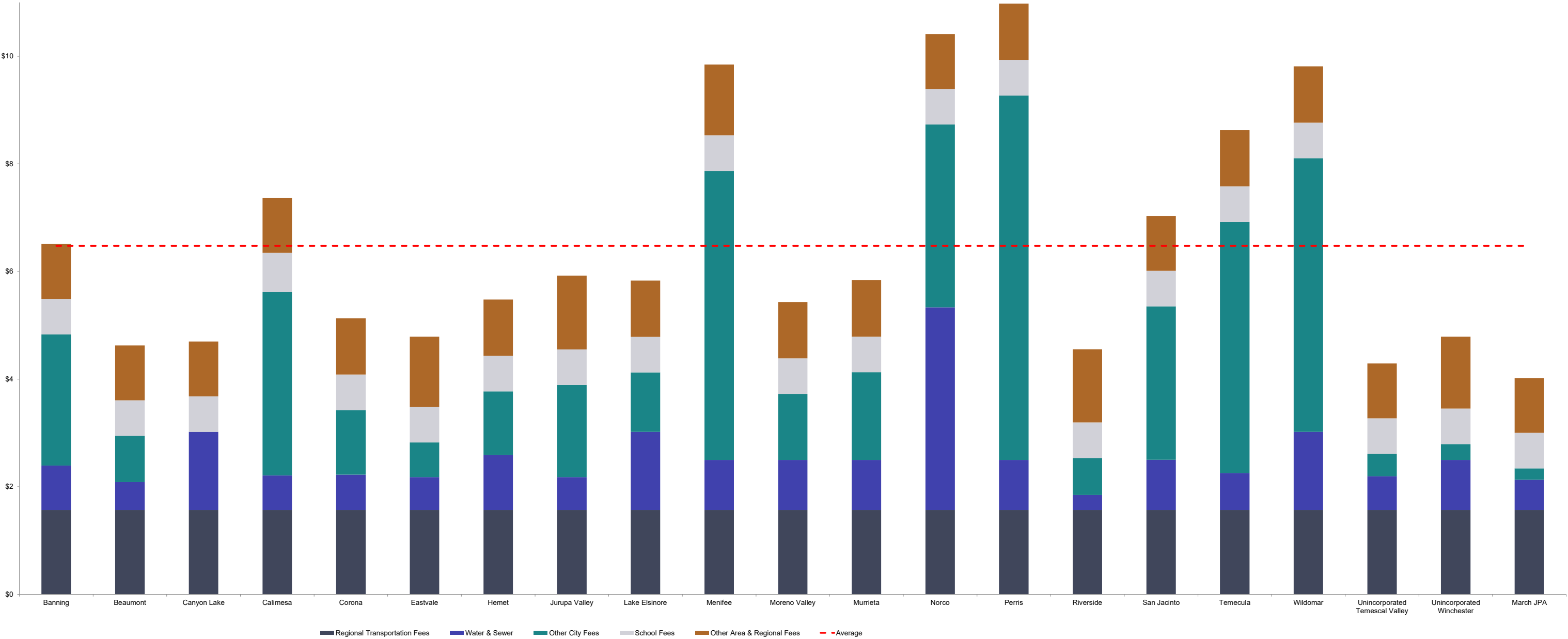
Fee estimates for specified development prototypes as of 2022. Actual fees will vary based on project specifics and any fee updates.
"Other Area Fees/Regional Fees" include, but are not limited to, regional parks, trails, multiservice center fees, area specific fees, and habitat mitigation fees.

Office Prototype
Development Fees by Jurisdiction (Per Square Foot)



Fee estimates for specified development prototypes as of 2022. Actual fees will vary based on project specifics and any fee updates.
"Other Area Fees/Regional Fees" include, but are not limited to, regional parks, trails, multiservice center fees, area specific fees, and habitat mitigation fees.

Industrial Prototype
Development Fees by Jurisdiction (Per Square Foot)



Fee estimates for specified development prototypes as of 2022. Actual fees will vary based on project specifics and any fee updates.
"Other Area Fees/Regional Fees" include, but are not limited to, regional parks, trails, multiservice center fees, area specific fees, and habitat mitigation fees.