



MAYOR JERRY DYER

NOTIFICATION OF APPOINTMENT BY MAYOR TO BOARD OR COMMISSION

TO: City Council

THROUGH: Todd Stermer, City Clerk

BY: Mayor Jerry Dyer

_____ Reappointment

 X New Appointment

Name of person replaced: Richard Keyes

Name: Sandra B. Vicente Martinez

Address:

Phone:

Appointed to: Fresno Regional Workforce Development Board – Private Sector

Term: Through 11/1/24

Application Form**Profile****Which Boards would you like to apply for?**

Fresno Regional Workforce Development Board: Submitted

Sandra

First Name

B

Middle Initial

Vicente Martinez

Last Name

Email Address

Home Address

Fresno

City

CA

State

Postal Code

What district do you live in? *☒ District 5

Primary Phone

Alternate Phone

Briefly explain why are you interested in serving on this board or commission?

I am looking for opportunities to better serve my community. Currently I am a Regional Manager for Union Bank serving 12 branches from Porterville to Madera, and have for the last 20+ years helped business clients reach their financial goals. I feel that I can do more outside of my day job to help our business community and citizens of the City of Fresno.

Educational background, Schools Attended, Degrees and Certifications

Bachelor of Science in Business Management Currently attending Banking Graduate Program at University of Washington, Pacific Coast Banking School - Expected graduation date September 2023

Briefly explain your qualifications or areas of demonstrated expertise for this board or commission.

20+ years in banking experience assisting thousands of business owners with their financial needs. Currently lead a team of 90+ employees. Currently serve as Board Chair for the Fresno Area Hispanic Foundation, where we assist business owners from inception to maturity of their business. Providing advice & resources on how to impact the communities they've been by creating jobs, and looking for ways to add value to the community either through products or services. Able to review business plans to assess community impact, make recommendations and connect business owners to the correct resources and partners to ensure they abide by rules and regulations of the cities they do business in.

Do you or an immediate family member have any professional or financial relationship that may present a potential conflict of interest for this board, commission or similar body?

☐ Yes ☒ No

Work History

MUFG Union Bank, N.A.
Employer

Regional Manager I, Director
Job Title

Work Address

City, State, Zip Code

Fresno, CA

Provide 3 Personal and Professional References. Provide name, address, and phone number where they may be reached during the day.

Fausto Hinojosa, CPA, CFE-Prince Page & Company
Randa Asadoor, Owner of Keystone Fruit & Brokerage
Andrew Smith, VP & CFO for RMC Constructors,

Question applies to multiple boards

I declare under penalty of perjury the above information is true and correct.

☐ Yes ☒ No

SANDRA VICENTE

CORE PROFESSIONAL STRENGTHS

Detail Oriented	Global Perspective	Building Key Strategic Relationships
Community Advocate	Efficiency Focused	Due Dilligence and Risk Assessment
Adaptability	Lead by Example	Excellent Communication Skills

EXPERIENCE

2008-Current MUFG Union Bank, N.A. Fresno, CA

Regional Manager I, Director

- Responsible and accountable for sales performance, client experience and operational integrity of assigned branches through activity-based management and direct coaching of branch managers.
- Drive consultative sales and service approach that provides a seamless end to end experience for the client.
- Actively inspect and monitor branches through frequent in person or virtual branch visits.
- Provide leadership, advice and guidance to assigned branch managers.
- Grow and develop talent, finding opportunities to promote from within where possible.
- Embody the bank's core values through building a collaborative and inclusive work environment.
- Lead by example in conjunction with the bank's culture principles.
- Collaborate with partners to drive improved productivity and household penetration.
- Clearly communicate goal expectations for branch managers and develop action plans to achieve and exceed assigned sales goals.
- Develop business plans and initiatives to increase market share and drive performance.
- Advocate for and implement the strategic direction in coordination with branch teams.
- Responsible for the achievement of FTE targets and expense budgets.
- Successfully implement and launch marketing initiatives in alignment with coordinated plans.
- Represent the bank within the community through board engagements and volunteer opportunities.

Branch Manager, Vice President

- Manage branch as a profit center. Maintains branch at approved expenditure levels.
- Reviews, controls and reports on general ledger activity.
- Responsible for the overall operating efficiency of the Branch, for delivering a consistent branch customer experience, and for coaching the sales and service staff.
- Writes business letters and reports pertaining to branch operations.
- Directs and provides leadership towards the achievement of maximum profitability and growth in line with company vision and values.
- Establishes the plan and strategy to acquire, retain, and expand the branch's customer base and contributes to the development of training and educational programs for staff.
- Develops sales and revenue generating programs.
- Conduct recruiting activities for branch and interviews and selects employees for hire.
- Responsible for the development and training of branch personnel, including evaluations and performance reviews. Determines promotions and salary increases for branch personnel. Train employees on expectations and policies.
- Evaluate processes and workflow to maximize productivity.
- Provide constructive feedback to staff. Administer counseling, corrective action processes, and all disciplinary actions, including termination decisions.
- Handle complaints and grievances and escalates as appropriate.

Additional positions currently/ previously held concurrent with Manager/Regional Manager role:

Region Level Learning & Development (Currently-in addition to Manager role):

- Prepares to instruct workshops by reviewing materials, practicing systems, creating visuals, testing equipment, rehearsing, obtaining advice and information from other instructors, preparing exercises, setting-up room and materials, making travel plans, and traveling to locations.
- Instruct core and advanced workshops for Bank employees to enhance employee knowledge and skills in one or more subject areas such as: credit and compliance; leadership and communications; operations; PC applications; products, sales, and relationship management skills; service skills.

Event Coordinator (Currently-in addition to Manager role):

- Coordinate details of events such as conferences, charity events, sales meetings, business meetings, employee appreciation events and virtual events.
- Calculate budgets and ensure they are adhered to.
- Visit venue to plan layout of seating and decorations. Schedule speakers, vendors, and participants.
- Initiate, coordinate and/or participate in all efforts to publicize event.
- Edit and design promotional materials. Coordinate and monitor event timelines and ensure deadlines are met. Coordinate event logistics, including registration and attendee tracking, presentation and materials support and pre- and post-event evaluations.

Division Operations Officer-Special Assignment (2016)

- Offer risk management and operational support to various departments and 30+ branches in the organization.
- Improve processes and policies in support of organizational goals. Formulate and implement departmental and organizational policies and procedures to maximize output. Monitor adherence to rules, regulations and procedures.
- Assist in recruitment and placement of required staff; establishment of organizational structure; delegation of tasks and accountabilities. Establish work schedules. Supervise staff. Monitor and evaluate performance in partnership with Employee Relations.
- Monitor, manage and improve the efficiency of assigned branches and support services such as IT, HR, and internal and external partners.
- Facilitate coordination and communication between branches and support partners.

Licensed Financial Representative (2012-2018)

- Develop and execute marketing and sales strategies to attract, deepen and retain a profitable portfolio, engaging internal Union Bank partners as well as external centers of influence.
- Act as consultative banker and trusted client advisor, anticipating needs relative to mass affluent market segment to ensure maximum profitability and cross-sell opportunities are met.
- Implement defined sales process with prospective and existing clients.
- Conduct discovery meetings, prepare presentations, follow up on client contacts and implement solutions through delivery of comprehensive UB products and services in alignment with client needs.
- Establish and maintain excellent working relationships with appropriate business partners (Wealth, Private Bank partners, Mortgage, Business / Commercial, Investments etc.) to deliver comprehensive, holistic solutions to clients.

2002-2008 Wells Fargo Bank, N.A.

Fresno, CA

Business Banking Specialist

- Provide a full range of business banking services to new and existing customers.
- Develop and grow relationships with key partners to help meet customers' financial needs.
- Introduce customers to internal partners to help with loans, Treasury Management and other business products.
- Proactively prospect and reach out to non-customers to discuss full range of services offered.

EDUCATION

Graduation Date: 2008 University Of Phoenix Fresno, CA

- Bachelor of Science in Business Management

Expected Graduation Date: September 2023 Universtiy of Washington Seattle, WA

- Pacific Coast Banking School- Graduate School of Business

PROFESSIONAL LICENSES PREVIOUSLY HELD

Series 6- Investment Company, Products/Variable Contracts Representative

Series 63-Uniform Securities Agent State Law Examination

Series 65- Uniform Investment Adviser Law Examination

Licensed Insurance Representative-Life, Accident, Health