



## Submitted application for ECONOMIC OPPORTUNITY COMMITTEE

Email \*

[REDACTED]

This Form and its contents may be subject to the California Public Records Act, and as such may therefore be subject to public disclosure unless otherwise exempt under the act.

First Name \*

Ida

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Last Name \*

Chan

Address 1 \*

[REDACTED]

City \*

[REDACTED]

State \*

CA

**Postal Code \***

[Redacted]

Some boards and commissions require membership to be racially, politically or geographically proportionate to the general public. The following information helps track our recruitment and diversity efforts.

**Ethnicity**

Hispanic/Latino

**Gender**

Female

**What district do you live in? \***

District 3

**Primary Phone \***

[Redacted]

**Alternate Phone \***

[Redacted]

Please identify how you prefer to be contacted.

Email

Are you currently serving on a County of Monterey Board, Commission, Committee or other Community Advisory Group? \*

No

## Interests & Experiences

Please tell us about yourself and why you want serve

A moto I live by is a moto I learned in Rotary, "service about self". I have spent my personal and professional career serving others. I spent 23 years as a banker working my way up, holding several key positions. Such as VP/Commercial Loan Officer, managing a \$25M portfolio, VP Bank Manager of the largest retail bank in the state of California, I established a new Bank Branch (De Novo) and grew the market share by 50%, and currently I am the CEO of the Soledad Community Health Care District, with strategic planning experience. Doing all this while working actively with the Latino Community and the underserved. I want to serve because it will give me an opportunity to share my talents with the committee to support important topics brought to the committee. My interest includes spending time with my family and being a lifelong learner. I am currently pursuing my PhD in Business Administration.

Please state the reason you would like to be a member of this board committee/commission/district.

As stated above, I believe the talents I have cultivated across my 25-year career can be of a value to the committee. My diversified background working in the finance industry and health care can be of value to the committee. I was born and raised in Southern Monterey County and it is the place where I continue to live, work, and raise my family. I have a passion of working to make our community a better place to live, work, and play. I believe that serving as a member of the board would give me an opportunity to work collaborative with other members of the board to accomplish these goals.

Have you served on an advisory group before?

Yes

How did you hear about the position?

Supervisor Mary Adams

Monterey County Policy - states that Commissioners are required to attend meetings on a regular basis. If appointed, will you be able to attend meetings regularly and devote the time necessary to fulfill your duties as a member \*

Yes

## Background Information

Upload a resume with the names, addresses, and dates of employers for the last five (5) years.

View Resume (/BCAndCApply/Files/025a0aff-bba3-4d0f-96a0-49b2f5ffd7ec.Resume 2020.pdf)

### Employer

Soledad Community Health Care District

### Job Title

CEO

### Occupation

Health Care

### Employer Address

[REDACTED]

## Information Regarding Conflict of Interest and Filing of Statements of Economic Interests (Form 700)

State and local law requires that you abstain from participation in decisions that may affect your financial interest, including sources of income and interest in real property or investments. In addition, if appointed you may be required to fill out a disclosure statement that identifies certain of your financial interest beginning with the immediate 12 months period prior to your appointment.

In accordance with Government Code Sections 87313 and the County of Monterey's Conflict of Interest Code, this Board/commission/Committee/District, you may be required to file statements disclosing certain types of information so that the public can be made aware of potential conflicts of interest. The types of disclosures are:

- Investments
- Interests in Real Property Held by a Business Entity or Trust
- Investments Held by a Business Entity or Trust Income (other than loans and gifts)
- Income – Travel Payments, Advances, Reimbursements
- Income gifts
- Business Positions
- Commission Income Received by Brokers, Agents, and Salespersons
- Income and Loans to a Business Entity or Trust Income from Rental Property

If you have any questions regarding disclosure requirements, please contact the Clerk of the Board's office at 831-755-5066.

Please identify any specialized accommodations needed for equal participation:

None

I DECLARE, UNDER PENALTY OF DISQUALIFICATION AND TERMINATION, THAT ALL STATEMENTS IN THIS APPLICATION ARE TRUE AND COMPLETE TO THE BEST OF MY KNOWLEDGE.

**Enter Your Initials \***

ILC

## IDA LOPEZ CHAN, MBA

### SUMMARY OF QUALIFICATIONS

Healthcare Executive with expertise in planning, directing and administering successful implementation of an organizations financial and business operations. Extensive nonprofit leadership and board experience. Highly skilled at building teams. Areas of expertise include client relationship management, business development, financial/budget management, and operations. Adept at applying financial management practices to ensure accurate budget forecasts and reports. Expertise in building and managing relationships with clients, C-Level executives, Board of Directors, Nonprofit leaders, Local, State and Federal officials and Education leaders. Bilingual Spanish and English.

### PROFESSIONAL EXPERIENCE

**Soledad Community Healthcare District, Soledad, CA**

**August 2020 – Present**

**CEO**

- Manage the overall operations of two facilities (Medical Clinic and Skilled Nursing) and third one to open in 2020 (Women's Health Center) in accordance with state and federal regulations and the overall strategy and mission of the organization.
- Direct a staff of 162 and oversee a budget of \$15M. Develop high quality business strategies and plans ensuring their alignment with short-term and long-term objectives.
- Lead and manage healthcare executive teams (Chief Medical Officers, Director of Nursing, Nursing Home and Clinic Administrators) to make high-quality decisions to advance/improve the access to health care within our community while maintaining financial sustainability of the district.
- Enforce adherence to legal guidelines and in-house policies to maintain the district's compliance and business ethics.
- Build positive relationships with key community stakeholders and business leaders and act as a point of contact for the district.
- Ensures that policies and practices effectively support sound and safe patient care, and that the delivery of healthcare services provides the highest level of a positive experience to the patient.

**Wells Fargo, Monterey, CA**

**2015 - 2020**

**Vice President, Senior Business Relationship Manager**

- Manage a \$25M portfolio of new and existing business customers and grow revenue by 10% year over year. Customers include businesses from Healthcare, Animal Health, Real Estate, Hospitality, Construction, and Ag Business industries.
- Provide services including loan, treasury management, merchant services, payroll, insurance, equipment financing, real estate, and financial and wealth management.
- Establish strong working relationship with Credit partners to insure ongoing credit quality of portfolio. Proven ability to adhere to sound risk management/pricing practices as well as to all internal and external credit/regulatory requirements.
- Recommend covenant structure and thresholds for all deals. Able to review loan documentation and close loans with terms and conditions consistent with approvals.
- Partner with Commercial Loan Administrators and Credit partners to ensure proper management of portfolio including financial reporting, exception resolution, annual reviews and file memos.
- Ensure compliance with all banking laws, rules, regulations, and prescribed policies/practices/procedures necessary to reduce risk.
- Partner with customers in order to fully understand their businesses, goals, strategies and challenges.
- Assess their financial needs for the purpose of formulating a business plan and delivering an effective variety of financial products and services.
- Perform effective financial analysis and underwriting in the areas of credit, cash flow and collateral.

- Partner with other Bankers and lines of business to deliver the full complement of Wells Fargo products and services.

**Mechanics Bank (Formerly Rabobank, N.A.), Salinas, CA  
Branch Manager, Retail Banking (2011-2015)**

**1998-2015**

- Directed the day to day operations for the largest retail branch in the State of California. Provided leadership, developed sales and profitability goals, and drove corporate initiatives. Generated revenue and fee-income through promoting Bank services, deposit and lending products. Oversight of a \$575M Bank and lending portfolio (commercial and residential loans).
- Monitored P&L performance and demonstrated the ability to balance risk with growth, successful management of the financial plan with responsibility for balance sheet growth, revenue growth, productivity and efficiency.
- Managed 15 direct staff members including recruiting, interviewing, hiring, and training employees; planning, assigning, and directing work; managing and appraising performance.
- Directed a sales team and developed sales strategies for penetration of new markets and acquisition of new customers.
- Awarded the Retail Score Card Top 20% and Club 100 Orange Jersey awards over four quarters for Top Producing Branch.
- Implemented and maintained prescribed risk and security controls while managing within the framework of the Bank standards, policies, and procedures.
- Ensured compliance with applicable state and federal banking regulations, bank policies and procedures and all regulatory compliance mandates and satisfactory branch audits.
- Determined sales goals for Bank Tellers and Loan Officers, and provided direction and guidance to the customer service managers, financial services officers and bank tellers in the achievement of those goals.
- Analyzed client's financial condition and recommended approval of financial solutions to best meet the client's business needs. Monitored loan portfolio to ensure compliance with all applicable standards, policies, and procedures.
- Monitored loan delinquencies and maturities, compliance with loan terms and covenants.
- Collaborated with internal (Commercial Lending, Ag, Treasury, Mortgage, Leasing, Wealth Management) and external (First Data, ADP Payroll Services) business partners to meet the financial needs of the Bank's clients and to deliver an integrated and seamless experience for all clients.
- Established and maintained relationships with influential community leaders and achieved a significant presence for the Bank in the community. Promoted the Bank in the community by recommending marketing strategies and corporate giving.

**Branch Manager, Denovo Branch, Retail Banking, Soledad, CA (2004-2011)**

- Established a new branch and grew market share by 40% over a seven year period. Generated revenue and fee-income through promoting Bank services, deposit and lending products (commercial and residential loans). Oversight of a \$15M Bank and lending portfolio.
- Directed the day to day operations and had oversight of the HR, Finance, Operations, Lending and Sales business units.
- Managed a staff of eight including interviewing, hiring, and training employees; planning, assigning, and directing work; managing and appraising performance; addressing complaints and resolving problems.
- Consulted with and advised clients regarding their financial and business operations focusing on business growth, developing short and long- term strategic plans, sustainability, and efficiency. Accomplishments included increasing revenue, implementing new tools and processes to manage cash flow, and determining financing opportunities, and establishing a process and timeline for determining business needs.
- Monitored P&L performance and demonstrated the ability to balance risk with growth, successful management of the financial plan with responsibility for balance sheet growth, revenue growth, productivity and efficiency.
- Ensured compliance with applicable state and federal banking regulations, bank policies and procedures, Bank Secrecy Act/ Anti-Money Laundering and all regulatory compliance mandates and satisfactory branch audits.

- Implemented and maintained prescribed risk and security controls while managing within the framework of the Bank standards, policies, and procedures.
- Monitored and adhered to operational controls, including legal, corporate and regulatory policies and procedures to ensure the safety and security of customer and bank assets.
- Integrated business segment partners (e.g. Commercial, Ag, Treasury, Mortgage, Leasing, and Wealth Management) into the branch team to drive sales and ensure that all client expectations were met.
- Drove outbound sales activities including: representing Rabobank, N.A. and building partnerships in the community (e.g., Chamber of Commerce, Rotary, business networks), and working with Relationship Managers.

**Assistant Vice President, Loan Officer, Commercial Lending Division, Salinas, CA (2000-2004)**

- Supported department initiatives through an innovative and strategic approach to developing new business. Consulted and worked with multicultural and multigenerational business owners to expand lending opportunities. Directed loan process from origination to funding which generated \$15M in funded loans.
- Made and conveyed decisions on loan approval, structure and pricing. Responsible for exercising credit risk management duties on loans within area of responsibility.
- Conducted complex credit analyses including those that involve multi-entity transactions with accrual accounting. Analyzed balance sheets, income statements, and cash flow of potential borrowers to ascertain creditworthiness.
- Ensured that all assigned loans were properly risk rated, ensured loss given defaults were correct and performance status assignments were proper.
- Maintained current knowledge of federal, state, and local codes, rules, and regulations, policies and procedures controlling and influencing lending operations.

**Loan Officer, Commercial Lending Division, Seaside/Monterey, CA (1999-2000)**

- Evaluated and recommended approval of commercial, real estate, and credit loans for businesses throughout Monterey County. Managed loan process from origination to funding and secured up to \$10M in funded loans. Worked with a multicultural and multigenerational of investors and small business owners.

**Credit Analyst, Commercial Lending Division, Salinas, CA (1998-1999)**

**EDUCATION**

California State University Monterey Bay – Master of Business Administration; CBO Academy – Completed a one year certification program and received State of California Certified Chief Business Officer title; College of Commercial Credit, Wells Fargo Bank – MBA equivalency - University of Washington, Pacific Coast Banking School, Seattle, WA - Completed a three year Graduate Level Management Education Program; California State University Fresno - BS, Business Administration, Emphasis Finance.

**PROFESSIONAL AFFILIATIONS**

Community Foundation for Monterey County – Audit and Investment Committees; Chair for Grants and Programs and Chairperson for the Grants Committee; Launched the Siembra Latino Fund, Vice Chair for the fund, Board member for six years and volunteer for eight; Rotary – Member, Former Assistant District Governor of Rotary for Territory 4 and Received Rotarian of the year 2010; City of Soledad – Measure “Y” Citizens Oversight Committee; Main Street Middle School – Board Advisory Committee, School Construction; Soledad Unified School District – Interviewing Committee; Salinas Valley Chamber of Commerce-Former Economic Development Committee Member; Frank Ledesma Elementary - Former President of the School Site Council.