



SCALE In-Person Convening

08/19/2025

9:00 am - 4:30 pm

Location: Block Community Hub 1955 Broadway, Suite B, Oakland, CA 94612

Agenda

- 9:00 - 10:00 am Breakfast and Networking
- 10:00 - 11:00 am Welcome: Centering the Small Business within the Mesh Network for Success
 - Carolina Martinez, CEO, CAMEO Network
 - Dr. Tara Lynn Gray, Director, California Office of the Small Business Advocate (CalOSBA)
 - Mayor Barbara Lee, City of Oakland
- 11:00 - 12:00 pm
 - The Success and Growth of the SCALE Network; Updates from CalOSBA
 - Clair Whitmer, Assistant Director, CalOSBA
 - Platform Enhancements and Training, EIC Team
- 12:00 - 1:15 pm Lunch/Networking
- 1:15 - 1:30 pm SCALE Outreach and CAMEO updates
 - Heidi Pickman, VP, Engagement and External Relations, CAMEO Network
- 1:30 - 1:45 pm Team Building!
 - Antonio Aguilar, , CAMEO Network

- 1:45 - 3:20 pm
 - State of Small Business Panel - Trends, challenges, and how to scale impact
 - Stephanie Burrell - The Sanctuary
 - Alfredo Ortiz - The Otter Squad Plumbing and Drain
 - Shirin Raza - Gold Palm
 - [Findings from a Survey of Small Business Resource Organizations](#)
 - Sarah Simms - San Francisco Federal Reserve
 - Tracy Choi - San Francisco Federal Reserve
- 3:20 - 4:00 pm
 - Reset and Refocus - Tools for Mental Clarity and Calm
 - Stephanie Burrell - The Sanctuary
- 4:00 - 4:10 pm Shareouts
- 4:10 - 4:20 pm Closing - Carolina Martinez
- 4:30 pm Happy Hour!
 - Gold Palm - 1900 Telegraph Ave, Oakland, CA 94612



Speaker Bios

Dr. Tara Lynn Gray - Director

California Office of the Small Business Advocate (CalOSBA)

Tara Lynn Gray was sworn in on April 26, 2021, as the 5th Director of the California Office of the Small Business Advocate. She serves as the voice for California's 4.2 million small businesses in the Governor's Office of Business and Economic Development.

Under Director Gray's leadership, the California Office of the Small Business Advocate focuses on helping to bring about Governor Newsom's California for All vision through further development of the state's small business ecosystem and by ensuring that questions about equity and inclusion are the starting point for all of the state's small business programs.

Gray's first model of economic development was learned in her grandmother's beauty shop. Her grandmother instinctively understood that her patrons needed credit as well as beauty services and she let them pay after services were rendered. This way, she kept the money circulating in the Black community and built a community of trust. She also imbued her granddaughter with her sense of compassion and indelible determination.

Running her own business for two decades, working with two small business development centers, and running a business association and a foundation has given Director Gray the requisite experience and expertise to advocate for small businesses.

Immediately prior to her appointment by Governor Newsom, Director Gray led the Fresno Metro Black Chamber of Commerce (FMBCC) and Chamber Foundation (FMBCF) as CEO. In her adopted city of Fresno, Director Gray engaged, educated, and empowered small businesses across California's Central Valley. At the same time, she became deeply engaged in community service, leading the initiative "Betting Big on Small Businesses Owned by Women and People of Color" on behalf of the DRIVE Investment Plan, with the goal of increasing economic mobility for entrepreneurs in disinvested neighborhoods.

Closing opportunity gaps, the role of women and BIPOC business leaders, and diversity in procurement opportunities are recurrent themes in her advocacy work. She has also led green economy initiatives, employment & training programs, and working to advance electric vehicle ownership.



Carolina Martinez - CEO

CAMEO Network

Carolina Martinez has considerable experience leading non-profit organizations and multicultural teams in North and South America. She has coached entrepreneurs in the development and execution of their business plans. In Colombia, she worked with vulnerable communities to identify business opportunities and develop strategic and marketing plans. In 2011, she joined Community Action Development Corporation of Bethlehem (CADCB) in Pennsylvania, where she taught 18-week classes for pre-ventures and startups. In 2012, she became the director of the Kutztown University Small Business Development Center's Latino Business Resource Center (LBRC). She returned to CADCB in 2015 as the Director to support the economic development of South Bethlehem and coordinate its 6-year revitalization plan.

In 2016 Carolina opened her own business, The Puentes Group, a consulting firm focused on providing small businesses with marketing and business strategies and accounting services to manage their growth.

Carolina joined CAMEO Network as its CEO in 2018.

Carolina serves on the Entrepreneurship & Economic Mobility Task Force in the California Office of the Small Business Advocate (CalOSBA) in the Governor's Office of Business and Economic Development. She is also on the Board of Directors of Pacific Community Ventures, Mission Economic Development Agency, and the Association for Enterprise Opportunity. She previously served on the Pennsylvania Governor's Advisory Commission on Latino Affairs, the Berks County Latino Chamber of Commerce board, and the Kutztown University Foundation board.

Rohan Kalbag - CEO

Main Street Launch

Rohan has over 20 years experience in financial services. He was formerly an executive vice president at Wells Fargo leading various functions within the institution's Commercial Banking division. He built and led relationship management and lending businesses in Northern California, the Midwest, and the Asia-Pacific region. He also worked in areas of risk management, change management, and middle office functions. His expertise and leadership have consistently driven successful outcomes in complex environments.

In addition to his professional accomplishments, Rohan is a dedicated philanthropist and community leader in the Bay Area. He is a founder and board member of Change a Path, a nonprofit organization focused on eliminating sex trafficking through their work in grant-making



and education. Rohan also serves on the board of Meals on Wheels San Francisco and is mentor for first generation college students through Berkeley Community Scholars.

Born in the United Kingdom, Rohan moved to the United States in 1995 and has built a global career, having lived and worked in Hong Kong, Australia, and Taiwan. He graduated with honors with a B.A. in economics and history from the University of Bristol in England. He has an M.A. in Far East Asian Studies from the University of London and an M.B.A. from the Haas School of Business at the University of California, Berkeley.

Stephanie Burrell - Business Owner
The Sanctuary

Stephanie Burrell, also known as Yoko, is a multidisciplinary Entrepreneur, Designer, Maker, and Educator whose work bridges creative expression, wellness, and cultural heritage. A certified Yoga Instructor in the Kemeti and Ashtanga traditions, she integrates meditation, breath work, and movement practices to help reconnect community with mindfulness. Since 2012, Yoko has worked as a freelance designer and consultant, helping small businesses strengthen their visual identity and digital presence. She is the founder of Worthy Beings®, a lifestyle brand offering apparel and home goods designed around affirming mantras. She is the co-founder of The Sanctuary, an eco-conscious wellness boutique located in the Grand Lake neighborhood in Oakland, CA. Through all her work, Yoko centers creativity and the power of bringing intangible ideas into tangible form.

Alfredo Ortiz - Business Owner
The Otter Squad Plumbing and Drain

Alfredo Ortiz is a seasoned plumbing professional, educator, and community advocate with more than 30 years of hands-on experience in the trade. He is the founder and owner of The Otter Squad Plumbing and Drain, a family-owned company based in Pleasanton, CA, serving the East Bay Area. Known for its unmatched craftsmanship and customer-first approach, The Otter Squad stands out as a company built on trust, quality, and integrity. Alfredo's journey is rooted in a deep commitment to excellence and giving back. As a PHCC board member and an instructor teaching 4th-year plumbing code, he dedicates his time to educating and inspiring the next generation of plumbers. His passion for creating opportunities extends beyond the classroom—he launched The Otter Squad Career Pipeline and is developing The Otter Squad Academy, programs designed to help formerly incarcerated individuals and underserved youth build careers in the trades. Believing in second chances and the power of skilled trades, Alfredo combines technical expertise with a heart for service. His leadership is guided by a vision to transform lives, strengthen communities, and elevate the plumbing profession. When Alfredo isn't running his company or mentoring future plumbers, he enjoys spending quality time with his



family and taking his dogs for walks along East Bay trails. His story is one of resilience, purpose, and dedication—a true reflection of what it means to build something meaningful, not just for today, but for generations to come.

Shirin Raza - Business Owner
Gold Palm

Shirin Raza is a former attorney-turned-hospitality entrepreneur, launching, owning and operating multiple businesses in Oakland, CA, where she is also a resident. In 2019 Shirin and her husband and business partner Daniel Gahr opened Bar Shiru, the first hi-fi vinyl listening bar in the Bay Area and one of the first in the United States. Inspired by Japanese jazz kissa, the Bar Shiru experience is centered around music, playing mostly jazz and soul records (in their entirety) on a fully analog, audiophile sound system. In late 2024, Raza and Gahr launched their second (and third) ventures in Oakland, Gold Palm and Moonglow. Gold Palm is an upbeat neighborhood bar and restaurant serving Pakistani-inspired small plates alongside a sustainably-minded beverage program that features creative cocktails and hyper-local beer and wine. Many of the recipes on the food menu are inspired by Shirin's mom Rashida and the food she used to cook at the boisterous house parties they hosted in the South Bay during the 80s and 90s. In Gold Palm, if you find the back door emblazoned with a gold crescent moon and ring the doorbell, you'll enter Moonglow, a "secret bar" serving up Martinis and underground electronic music. Once again creating a first-of-its-kind establishment in Oakland, Raza and Gahr lean into the speakeasy concept for Moonglow by relying primarily on word-of-mouth, if-you-know-you-know approach to marketing and staying almost entirely off of social media. In addition to her work as GM for their establishments, Shirin is also an active member of various Uptown-Downtown merchant and community groups, working on various efforts to rebuild and revitalize the neighborhood, from beautification to public safety infrastructure.

Sarah Simms
Federal Reserve Bank of San Francisco

Sarah Simms is community development finance manager in Community Engagement and Analysis at the Federal Reserve Bank of San Francisco. In this role, Sarah is responsible for engaging communities across the Twelfth Federal Reserve district to identify financial and credit needs of local communities. Before joining the Federal Reserve Bank of San Francisco, Sarah spent 10 years structuring and managing the lifecycle of investments at the Low Income Investment Fund, a national Community Development Financial Institution. She also spent several years working with the U.S. Senate Committee on Banking, Housing and Urban Affairs.

**Tracy Choi**

Federal Reserve Bank of San Francisco

Tracy Choi is senior outreach manager for Northern California (including the San Francisco Bay Area) and Utah in Community Engagement and Analysis at the Federal Reserve Bank of San Francisco. In this role, she is responsible for engaging communities and connecting with a broad range of community development stakeholders to understand the economic experiences of lower-income households and communities. Tracy has a background in affordable housing and community development, primarily in the public and nonprofit sectors. Before joining the Federal Reserve Bank of San Francisco in 2022, Tracy spent six years at the County of San Mateo Department of Housing, working to accelerate affordable housing development opportunities and administering housing and community development programs and services.