#### CORPUS CHRISTI DOWNTOWN MANAGEMENT DISTRICT

\*One (1) vacancy with term to 9-30-22, representing the following category: 1 - Resident. (Note: Per the Texas Local Government Code, succeeding directors are chosen through the recommendation of the board and the approval of the City Council. The Corpus Christi Downtown Management District is recommending Jamie Nodarse Barrera.)

#### **Duties**

The Corpus Christi Downtown Management District provides maintenance, security, marketing, and the promotion and improvement of property and facilities within the district; the district has the authority to levy taxes or assessments for improvements in the downtown area.

#### Composition

The district is composed of at least nine, but not more than thirty directors, serving four-year staggered terms. Directors must represent one of the following categories: a resident of the district; an owner of property in the district; an owner of stock, whether beneficial or otherwise, of a corporate owner of property in the district; an owner of a beneficial interest in a trust that owns property in the district; or an agent, employee or tenant of one of the above. Per the Texas Local Government Code, succeeding directors are chosen through the recommendation of the board and the approval of the City Council.

Member Size Term Length

15

Name	District	Term	Appt. date	End date	Appointing Autl	Position	Status	Category
*Lexi Buquet	District 1	Partial	12/8/2015	9/30/2022	City Council		Resigned	Resident
Steve Keenan	District 5	1	9/27/2016	9/30/2020	City Council		Active	Agent, Employee or Tenant
Cherylyn M Boyd	District 1	2	12/8/2015	9/30/2020	City Council		Active	Property Owner
Janet Maxwell	District 4	1	12/18/2012	9/30/2020	City Council		Active	Stock Owner
Raymond Gignac	District 4	4	8/21/2001	9/30/2020	City Council		Active	Property Owner
Mrs Cheryl A Votzmeyer	District 1	Partial	4/9/2019	9/30/2020	City Council		Active	Property Owner
Mrs. Lesley B. Lomax	District 4	Partial	11/12/2019	9/30/2020	City Council		Active	Agent, Employee or Tenant
Eric R Gutschow	District 5	1	9/12/2017	9/30/2022	City Council		Active	Property Owner
Glenn R. Peterson	District 4	3	6/8/2010	9/30/2022	City Council		Active	Property Owner
Casey Lain	District 2	3	6/8/2010	9/30/2022	City Council		Active	Property Owner
Brad Lomax	District 4	2	8/12/2014	9/30/2022	City Council		Active	Property Owner
Caitlin Shook	District 4	Partial	4/10/2018	9/30/2022	City Council		Active	Agent, Employee or Tenant
Dee Dee Perez	District 5	3	6/8/2010	9/30/2022	City Council	Secretary	Active	Agent, Employee or Tenant
Joshua Richline	District 2	Partial	11/12/2019	9/30/2022	City Council		Active	Agent, Employee or Tenant
Harold Shockley Jr.	District 5	2	5/8/2012	9/30/2022	City Council	Chair	Active	Agent, Employee or Tenant

#### **CORPUS CHRISTI DOWNTOWN MANAGEMENT DISTRICT**

### **Applicants**

Name	District	Category
Jaime N Barrera	District 4	Property Owner
		Stock Owner,
Suzelle M Tinnell	District 4	Agent Employee or Tenant

## Application for a City Board, Commission, Committee or Corporation

Profile			
Jaime	N Barrera		
First Name	Middle Initial Last Name		
Email Address			
Lindi redicoo			
450 Coral PI.			
Street Address		***	
Corpus Christi		TX	78411
City		State	Postal Code
What district do you live in? *	•		
<b>▽</b> District 4			
₩ District 4			
Current resident of the city?			
€ Yes € No			a mari din sani di dindri a di sani di pada di pri serpanjan dan dangga di Langga di pang di pri d
If yes, how many years?			
11			respondent in the contract of
Mobile: (361) 563-5083	Business: (361) 825-3320		
Primary Phone	Alternate Phone		
Texas A&M University-Corpus Christi	Vice President Institutional Advancement		
Employer	Job Title		
Work Address - Street Addre	ss and Suite Number		
6300 Ocean Dr., Unit 5741	,		
Work Address - City			
Corpus Christi			
Work Address - State			
TX			· · · · · · · · · · · · · · · · · · ·
Work Address - Zip Code			
78412			

Work Phone
3618253320
Work E-mail address
jaime.nodarse@tamucc.edu
Preferred Mailing Address
₩ Work Address
Which Boards would you like to apply for?
CORPUS CHRISTI DOWNTOWN MANAGEMENT DISTRICT: Submitted
Interests & Experiences
Are you a registered voter?
€ Yes € No
Do you currently serve on any other City board, commission or committee at this time? If s please list:
No
Education, Professional and/or Community Activity (Present)
EDUCATION Texas A&M University, College Station, TX Financial Planning Certificate Program Finance Planning Certificate Completion University of South Florida, Tampa, FL Graduate School of Arts and Sciences, Department of Applied Anthropology Master of Arts in Applied Anthropology University of South Florida, Tampa, FL College of Public Health, Department of Community and Family Health Master of Public Health in Maternal and Child Health Lawrence University, Appleton, WI Bachelor of Arts cum laude in Anthropology Independent Research cum laude PROFESSIONAL AFFILIATIONS Council for Advancement and Support of Education (2012-Present) Association of Fundraising Professionals, Coast Bend Chapter (2014-Present) Corpus Christi Estate Planning Council (2015-2019) COMMUNITY ACTIVITY (Present) Corpus Christi Symphony Orchestra Board of Directors (2019-Present) United Corpus Christi Chamber of Commerce Governmental Affairs Committee (2018-Present) Six Points Kiwanis Club, Past President (2012-Present) Women's and Men's Health Services Board of Directors, Past President (2014-Present)
If you applied for multiple boards, which boards are you most interested in serving on, in order of preference? (Limit to top three)

N/A

#### Why are you interested in serving on a City board, commission or committee?

As the Vice President of Institutional Advancement at Texas A&M University-Corpus Christi, it would be an honor to serve on the DMD Board of Directors as the representative from Texas A&M University-Corpus Christi. The University's expansion into downtown Corpus Christi is monumental both for the University and our community. Our investment in downtown is a commitment to working collaboratively to positively impact and assist in the revitalization of the downtown area. We believe that a vibrant downtown benefits everyone through enhanced economic development, recruitment and retention of high-achieving students and young professionals, increasing opportunities for innovation and growing cultural events in arts and entertainment. And, we believe that Texas A&M-Corpus Christi can add to the positive improvements and energy that are building through the efforts of the DMD. Personally, I believe in the power of a vibrant downtown and want to live in a community that invests in and benefits from a downtown that is thriving. I have seen the effects of the DMD's work over the past several years and want to be a part of the effort happening to make our downtown safer, more beautiful and bustling with new businesses. I love living in Corpus Christi and believe that we have an opportunity to build on the momentum happening over the last several years to make positive progress

memorial mapped and the tractice to make positive progress.
Upload a Resume
Are you an ex-Officio member of a City Board, commission or committee?
c Yes c No
No person shall be appointed by the Mayor or Council Members to serve on more than one board, commission, committee or corporation at the same time. If you currently serve as a voting member for a board, commission, committee or corporation are you willing to resign your current seat to serve on another board, commission, committee or corporation?
r Yes r No
Demographics
Gender
<b>▽</b> Female
Code of Ethics - Rules of Conduct/Conflicts of Interest
Do you represent any person or organization in any claim or lawsuit or proceeding involving the City?
c Yes r No
Do you, your spouse, your business or your spouse's business have a City contract?
r Yes r No
Does your employer or your spouse's employer have a City contract?
c Yes c No

/erification
w reports of the
Question applies to CORPUS CHRISTI DOWNTOWN MANAGEMENT DISTRICT  The Corpus Christi Downtown Management District must include representatives from certain categories. Do you qualify for any of the following categories? *
Board-specific questions (if applicable)
N/A
f you answer "Yes" to any of the questions above, please explain or ask to speak with the City's Legal Department. If you answer "NO" to all questions above, please enter N/A.
r Yes r No
Do you or your spouse have a pending claim, lawsuit or proceeding against the City?
C Yes c No
Are you, your spouse, your business or your spouse's business involved in any pending bid, proposal or negotiation in connection with a contract with the City?
r Yes r No

#### City Code Requirement - Residency

As a board, commission, or committee member, you will be asked to adhere to City Code of Ordinances, Section 2-65, which states that all members of City boards and commissions, including ad hoc committees, appointed by the City, must be residents of the city. A move outside the city limits of the city by any member shall constitute automatic resignation from the particular board or commission on which such member served.

✓ I Agree

#### **City Code Requirement - Attendance**

As a board, commission, or committee member, you will be asked to adhere to City Code of Ordinances, Section 2-61, which provides that absences from more than 25% of regularly scheduled meetings during a term year on the part of any board, commission, or committee member shall result in an automatic termination. An absence shall be deemed unexcused unless excused by the board, commission or committee for good cause no later than its next meeting after the absence.

✓ I Agree

#### Consent for Release of Information

I understand that if any member of the public makes a request for information included in this application or in any attachment (e.g. resume or supporting documentation) for appointment it is subject to and must be disclosed under the Texas Public Information Act. I understand that under the Texas Public Information Act, my home address and home telephone number is subject to public disclosure unless I am elected or appointed to the position which I seek. I hereby consent to the release of my home address and home telephone number should it be requested under the Texas Public Information Act prior to my possible appointment or election. I hereby release the City of Corpus Christi, and its agents, employees and officers, from any and all liability whatsoever if the information must be released pursuant to the Texas Public Information Act.

✓ I Agree

#### Oath

I swear that all of the statements included in my application and attached documents, if any, are true and correct.

✓ I Agree

#### Jaime Nodarse Barrera

450 Coral Place Corpus Christi, Texas 78411 361-563-5083

#### **EDUCATION**

Texas A&M University, College Station, TX Financial Planning Certificate Program *Financial Planning Certificate Completion* 

University of South Florida, Tampa, FL Graduate School of Arts and Sciences, Department of Applied Anthropology *Master of Arts in Applied Anthropology* 

University of South Florida, Tampa, FL College of Public Health, Department of Community and Family Health Master of Public Health in Maternal and Child Health

Lawrence University, Appleton, WI

Bachelor of Arts cum laude in Anthropology

Independent Research cum laude

#### **EXPERIENCE**

Texas A&M University-Corpus Christi
Vice President of Institutional Advancement
Present
Acting Vice President of Institutional Advancement
2020

December 2012-Present *March 2020-*

May 2019-February

- Provide strategic leadership in cultivating relationships for the University with alumni, donors, friends of the University, board members and elected officials
- Work closely with the University President and Administration to set challenging, yet realistic, fundraising priorities and goals that align with the strategic plan of the institution
- Procure resources to advance the goals and mission of the University and personally manage a portfolio of high-level donors and prospective donors
- Lead and manage the departments of Advancement Services, Alumni Relations,
   Development and Stewardship, and coordinate with the Texas A&M-Corpus Christi
   Foundation in regards to solicitation and management of donations
- Lead planning and implementation of the current Capital Campaign
- Create and implement departmental work plans designed to strategically and incrementally increase alumni engagement, alumni participation rate, and overal philanthropic support for the University over time
- Regularly assess and report progress on fundraising and work plan goals to the University President and Administration

Assistant Vice President of Development

August 2017-May 2019

- Identified, cultivated, solicited, and stewarded major, special and planned gifts
- Planned and implemented campaigns related to major, special and planned giving
- Led planning and implementation of Capital Campaign
- Supervised the Executive Director of Alumni Relations and oversaw alumni relations, the National Islander Alumni Association Board of Directors, and all engagement activities including outreach and participation with the Young Business Professionals of the Coastal Bend
- Supervised the Executive Director of Development and oversaw all aspects of annual, mid and major level Development activities; including Annual Fund, Parents' Gouncil, President's Council, Faculty & Staff Giving Campaign, and the Student Foundation Association
- Supervised the Executive Director of Advancement Services and oversaw all aspects of prospect research, gift processing, database management, and records and reporting
- Supervised the Stewardship Coordinator and oversaw all donor relations, stewardship, and event planning activities
- Supervised the Foundation Coordinator and acted as the liasion with the Texas A&M-Corpus Christi Foundation

## Interim Director of Marketing 2017

July-August

- In addition to AVP duties, oversaw supervision and management of the Marketing department during family leave of the director
- Supervised graphic designer, social media coordinator, photographer and web developers daily assignments
- Oversaw content layout and editing for University print and online publications
- Implemented the first phase of a major University-wide marketing campaing, *Islander Impact*, to include facilitating meetings with external consultant, review and approval of all marketing materials, and implementation of new materials on external and internal channels

#### **Interim Director of Communications**

August 2017-January 2018

- In addition to AVP duties, acted as Director of Communications during staffing transition of that position prior to the hiring of a new VP of Marketing and Communications
- Oversaw management and operations of communications team, including writing staff, videographer, public information requests, public relations, and the administrative assistant
- Acted as the University Public Information Officer, including throughout Hurricane Harvey
- Led communications efforts for the entire University throughout Hurricane Harvey, including mandatory evacuation of campus, messaging throughout the hurricane, postdisaster messaging and public relations, and communications during the re-opening of campus
- Worked directly with the Incident Command Officer and Team and the President of the
  University to ensure students, parents, faculty, staff, alumni and the community were
  updated regularly about the impact of the hurricane on campus and the delayed start of
  the semester
- Served the President as the primary content manager and messaging expert

## Director of Foundation and Corporate Relations 2015

December 2012- June

 Administered the preparation and submissions of foundation and corporate gift proposals for the Office of Development

- Identified and solicited corporate partners for the Achieve Campaign
- Directed the identification and cultivation of prospective foundation and corporate funders
- Directed stewardship efforts to maintain positive relationships with existing foundation and corporate donors
- Supervised grant writer and other projects as assigned by the Vice President of Institutional Advancement

#### Amistad Community Health Center Corpus Christi, TX

#### September 2009-December 2013

#### Director of Resource Development and Quality Improvement

- Member of four-person management team responsible for: carrying out organization's mission, vision and goals; developing and monitoring operating and capital budgets; developing and implementing policies and procedures; and recruiting and retaining qualified, professional and compassionate staff
- Responsible for grant development, implementation, budget compliance and reporting
- Implemented quality improvement program, including data collection and analysis,
   Federal and State regulation compliance, and reporting outcomes
- Promoted organization's services and enhanced visibility among community stakeholders
  by participating in multiple community coalitions and committees, representing the
  organization at fundraisers and local social service agency meetings, and directed and
  implemented external marketing campaign

#### Mission 911 Homeless Shelter

#### July 2009-September 2009

#### **Grant Writer**

- Assisted with shelter operations, including facilities management, volunteer placement, and development of standard operating procedures and client evaluations
- Supported the shelter director with grant writing, soliciting donations and sponsorships, and chaired major fundraising event

#### Texas House of Representatives, Austin, TX

February 2009-June 2009

#### Legislative Aide, Representative Roland Gutierrez

- Responsible for covering proposed legislation related to Health and Human Services
- Researched and analyzed health policy legislation
- Wrote summary documents for the Representative on health-related proposed legislation
- Communicated and collaborated with various stakeholders to create legislation that addressed a health need and was supported by government and non-profit agencies
- Drafted legislation relating to lead risk assessment screenings, a diabetes registry pilot program, and the reporting of MRSA infections

#### Metropolitan Ministries, Tampa, FL

#### May 2007-December 2008

#### Health Specialist Case Manager

- Participated as member of residential committee responsible for evaluating, admitting, or terminating residents' housing contracts based on their performance and ability to meet agreed upon goals for program completion
- Designed Health Assessment survey instrument to assess medical needs and health related issues of homeless residents
- Conducted Health Assessments with homeless residents when they arrived at the shelter in order to connect them with necessary health care services and providers

- Assisted shelter residents in navigating health care and health insurance systems
- Assisted residents in overcoming barriers limiting their access to health care services

#### Marketing Advantage, Davenport, IA

2005-2009

#### Consultant, Organizational Branding and Qualitative Methods

- Designed and implemented market research plans and methods
- Conducted and analyzed in-depth interviews of clients and research participants
- Wrote summation of research results for presentation to clients
- Researched, created and implemented social media marketing strategies

#### Lawrence University, Appleton, WI

2005-2006

#### Associate Director of Admissions, Multicultural Recruitment

- Recruited students from a territory that covered Wisconsin, Minnesota, and Iowa through high school visits, college fairs and on-campus recruitment events
- Recruited multicultural students from a variety of ethnic, socio-economic, geographic, and cultural backgrounds to ensure diversity among incoming class
- Evaluated student applications for admissions and recommended top-performing students for admissions and scholarships
- Supervised and trained over 300 student workers who served as tour guides, lunch hosts, and overnight hosts to prospective students

#### **Committee Involvement**

#### Texas A&M University-Corpus Christi

- President's Cabinet
- Institutional Effectiveness Council for Administrative and Support Units
- Strategic Planning & Continuous Improvement Council
- Intercollegiate Athletics Council
- Community Outreach Council
- Scholarship Committee
- University Technology Council

#### **Professional Affiliations**

- Council for Advancement and Support of Education (2012-Present)
- Association of Fundraising Professionals, Coastal Bend Chapter (2014-Present)
- Corpus Christi Estate Planning Council (2015-2019)

#### **Community Involvement**

- Corpus Christi Symphony Orchestra Board of Directors (2019-Present)
- United Corpus Christi Chamber of Commerce Governmental Affairs Committee (2018-Present)
- Six Points Kiwanis Club, Past President (2012-Present)
- Women's and Men's Health Services Board of Directors, Past President (2014-Present)

- Lawrence University Viking Gift Committee and Reunion Chair (2004-2019)
- Leadership Corpus Christi Executive Committee (2012-2016)
- Leadership Corpus Christi Class XLII, General Chair (2013-2014)
- Destination Bayfront (2012-2013)
- Habitat for Humanity Board of Directors, Vice-President (2011-2012)
- Leadership Corpus Christi Class XXXIX (2010-2011)
- Goodwill GoodGuides Program, At-Risk Youth Mentor (2010-2011)
- CCU40 Steering Committee (2010-2011)
- Texas A&M University Bush School of Public Services Emerging Leaders in Public Service Program (2010)
- Lawrence University Alumni Association Board of Directors, Student Relations Committee Chair (2004-2008)
- University of South Florida Service Learning Leadership Academy (2006-2007)

#### **Awards**

- Ready or Not Foundation 2019 Best Dressed Honoree
- Lawrence University Marshall B. Hulbert '26 Young Alumni Outstanding Service Award 2019
- Texas A&M University-Corpus Christi Harvey's Heroes Award 2017
- Six Points Kiwanis Club 2013 Kiwaniian of the Year
- Corpus Christi Under 40 Recipient 2013

#### References

Penelepe Hunt, Senior Consultant and Principal Marts & Lundy 224-678-8195 hunt@martsandlundy.com

S. Trent Hill, Vice President of Philanthropic Partnerships
Amarillo Area Foundation/Don and Sybil Harrington Foundation
806-376-4521
trent@aaf-hf.org
801 S. Fillmore, Suite 700
Amarillo, TX 79101

Ben Wallace, Chairman of the Board
American Bank
361-653-5070
bwallace@americanbank.com
800 N. Shoreline Blvd., Ste. 200S
Corpus Christi, TX 78401

#### **Application for a City Board, Commission, Committee or Corporation**

Profile			
Suzelle First Name	M Tinnell  Middle Initial Last Name		
Email Address			
5541 Ocean Drive			
Street Address			
Corpus Christi		TX	78412
City		State	Postal Code
What district do you live in	?*		
District 4			
Current resident of the city	?		
⊙ Yes ♂ No			
If yes, how many years?			
7			
Mobile: (206) 650-6095	Business: (361) 653-5151		
Primary Phone	Alternate Phone		
American Bank	Director, Enterprise Planning & Alignment		
Work Address - Street Add	Job Title		
800 N Shoreline Blvd, Ste 2N	and Cano Hambol		
Work Address - City			
Corpus Christi			
Work Address - State			
Texas			
Work Address - Zip Code			
78401			

3616535151
Work E-mail address
stinnell@americanbank.com
Preferred Mailing Address
Which Boards would you like to apply for?
CORPUS CHRISTI DOWNTOWN MANAGEMENT DISTRICT: Submitted
Interests & Experiences
Are you a registered voter?
• Yes • No
Do you currently serve on any other City board, commission or committee at this time? If so please list:
No
Education, Professional and/or Community Activity (Present)
BBA, TAMU-CC Leadership Corpus Christi 42 Executive Management team for American Bank
If you applied for multiple boards, which boards are you most interested in serving on, in order of preference? (Limit to top three)
I have not yet applied for any other board committees, but plan on applying for two more opportunities: 1 Corpus Christi Regional Economic Development Corporation 2. Clean City Advisory Committee 3. CC Community Investment Corporation/Loan Review Committee
Why are you interested in serving on a City board, commission or committee?
I would like to utilize my management, planning and organizational skills to help improve our city for current residents and to identify opportunities and investments that can be made to improve the city's livability and quality of life to make it more attractive as a home to prospective citizens and young people who have grown up here or are attending our local colleges and university.
Upload a Resume

Are you an ex-Officio member of a City Board, commission or committee?

o Yes ⊙ No

**Work Phone** 

lving
ng
the
ion.
1

Question applies to CORPUS CHRISTI DOWNTOWN MANAGEMENT DISTRICT

The Corpus Christi Downtown Management District must include representatives from certain categories. Do you qualify for any of the following categories? \*

Stock Owner

#### Verification

#### City Code Requirement - Residency

As a board, commission, or committee member, you will be asked to adhere to City Code of Ordinances, Section 2-65, which states that all members of City boards and commissions, including ad hoc committees, appointed by the City, must be residents of the city. A move outside the city limits of the city by any member shall constitute automatic resignation from the particular board or commission on which such member served.

✓ I Agree

#### City Code Requirement - Attendance

As a board, commission, or committee member, you will be asked to adhere to City Code of Ordinances, Section 2-61, which provides that absences from more than 25% of regularly scheduled meetings during a term year on the part of any board, commission, or committee member shall result in an automatic termination. An absence shall be deemed unexcused unless excused by the board, commission or committee for good cause no later than its next meeting after the absence.

✓ I Agree

#### **Consent for Release of Information**

I understand that if any member of the public makes a request for information included in this application or in any attachment (e.g. resume or supporting documentation) for appointment it is subject to and must be disclosed under the Texas Public Information Act. I understand that under the Texas Public Information Act, my home address and home telephone number is subject to public disclosure unless I am elected or appointed to the position which I seek. I hereby consent to the release of my home address and home telephone number should it be requested under the Texas Public Information Act prior to my possible appointment or election. I hereby release the City of Corpus Christi, and its agents, employees and officers, from any and all liability whatsoever if the information must be released pursuant to the Texas Public Information Act.

✓ I Agree

Oath

I swear that all of the statements included in my application and attached documents, if any, are true and correct.

✓ I Agree

#### SUZELLE MALDONADO TINNELL

206.650.6095

• 5541 Ocean Dr, Corpus Christi, TX 78412

#### **EXECUTIVE PROFILE**

Senior business leader with track record of identifying and implementing practical solutions and establishing best practices that enable results by focusing on the customer, optimizing resources, leading execution, and improving overall organization effectiveness. Adept at engaging team members and business leaders to quickly understand business objectives and enabling strategies; review, validate and align priorities; and put realistic plans in place to deliver against key initiatives. Known for building relationships, collaborating across all functions and levels, and motivating and developing teams that consistently deliver value in a dynamic and team-oriented environment.

#### PROFESSIONAL EXPERIENCE

## American Bank, N.A., Corpus Christi, TX

2012-Present

Director, Enterprise Planning and Alignment (2017-Present)

Responsible for developing and managing the enterprise strategy based on business objectives and long term goals. Identifies and oversees execution of strategic initiatives, develops Key Performance Indicators (KPIs), management reporting and dashboards; and ensures cross-company alignment of strategies, objectives and KPI's. In addition, oversees the enterprise PMO function to ensure that company initiatives are understood, prioritized and implemented to increase organizational effectiveness, deliver a superior client experience, and maximize shareholder value.

#### **Chief Deposit Services Officer (2016-2017)**

Responsible for overseeing bank-wide branch operations, including consumer and business deposit services, treasury management, customer service, and the enterprise project management office. Lead a team of senior bank officers focused on delivering relevant banking solutions that help our clients accomplish their personal and business objectives, better manage their finances, and protect their financial assets.

#### Manager, Project Management Office (2012-2016)

Lead planning and project management efforts to ensure successful delivery of key strategic initiatives, including new bank products and services, and focused on improving organizational and operational efficiency. Work directly with senior management team to identify strategic objectives, set project priorities aligned with business goals and develop realistic implementation plans, while considering resource constraints. Responsible for maturing the bank's project planning competency by partnering with business teams to provide training, coaching and advocacy for project management best practices.

# Slalom Consulting, LLC, Seattle, WA 2011-2012 Program Manager, Health Plan Business Transformation Project: Group Health Cooperative

Led a large, complex technology systems implementation program for a regional health plan and care delivery organization. Responsible for planning and managing all phases of the technology implementation, incorporating project management principles and advocating for the application of standard systems development lifecycle processes. Partnered closely with business operations program manager and business leaders to define scope, understand business requirements, track and govern the overall program. Set direction and provided mentoring to 7 technical project managers, and provided ongoing business consulting to executive leaders. Initial client engagement included establishment of a Program Management Office, including developing and implementing a program organization and governance structure, as well as project management processes.

#### Starbucks Coffee Company, Seattle WA

1996 - 2010

Vice President, IT Business & Project Management (2004 - 2010)
Interim Executive Leader, HR Systems Team (2008 - 2009)
Interim Executive Leader, Information Security & Services Team (2009-2010)

Responsible for establishing and leading business operations functions for a large, centralized IT organization. Led the creation and implementation of the IT Business and Project Management organization with over 60 employees across a diverse set of functional areas including IT Program Management Office, Portfolio and Resource Management, Governance, Strategic Planning, IT Financial Management and Cost Optimization, Enterprise Telecom and Network Cost Management, Strategic Vendor Management, IT Effectiveness, and IT Audit Compliance.

Director, IT Finance and PMO (2001 - 2004) Manager, IT Finance (1998 - 2001) Senior Financial Analyst, Corporate Development (1996 - 1998)

## U.S. Bank of Washington, Kennewick, WA

1992 - 1996

**Assistant Vice President, Commercial Account Officer** 

- Developed new business, enhanced client relationships and increased bank profitability by crossselling bank products and services, meeting or exceeding growth and credit quality goals for each year.
- Increased professional client base, establishing first portfolio of private banking clients in market.
- Evaluated, granted and/or recommended credit requests for commercial clients, and negotiated terms and conditions of loans based upon perceived risk and profitability.
- Delivered presentations covering topical banking issues to community organizations, local trade shows and economic development forums.

## Puget Sound Bank, Seattle, WA

1989 - 1992

Commercial Loan Support Officer (1991-1992)

- Evaluated commercial credit requests for commercial loan clients using financial statement analysis tools such as trend analysis, projection and sensitivity analysis, ratio, cash flow and management analysis.
- Conducted business development activities increasing bank's market share and contribute to overall growth.

Credit Analyst/Credit Analyst Supervisor (1989 - 1991)

- Analyzed corporate financial statements, cash flows, ratios and projections to evaluate past, present and future financial strength of commercial borrowers and assist commercial loan officers in the determining credit worthiness.
- Supervised three credit analysts and one management trainee.

#### Republic Bank, Torrance, CA 1989

- New Accounts and Customer Service supervisor, responsible for meeting with new and existing bank customers to understand their deposit account needs and recommend suitable bank services and accounts.
- Responsible for explaining account details to customer to ensure their understanding of the rules and requirements of bank products. Also responsible for documenting accurate customer information and processing documents necessary to open new accounts.
- Provided back-up customer service support during busy periods and other special projects as assigned.

#### Nueces National Bank, Corpus Christi, TX

1984-1987

Promoted to New Accounts Representative, from back-office customer support role. Responsible
for meeting with new and existing bank customers to understand their checking, savings, CD/IRA
or other deposit account needs and recommend suitable bank services and accounts.

- Responsible for explaining account details to customer to ensure their understanding of the rules and requirements of bank products. Also responsible for documenting accurate customer information and processing documents necessary to open new accounts.
- Attended business banking customer meetings with commercial loan officers to provide information regarding bank's deposit account products, rates and other services.
- Provided back-up customer service support during busy periods and other special projects as assigned.

#### **EDUCATION**

Bachelor of Business Administration, emphasis in Finance; Texas A&M Corpus Christi Northwest Intermediate Commercial Lending School; University of Portland Graduate School of Business Executive Education; University of Chicago

- Strategic Business Leadership: Creating and Delivering Value
- Information Technology for non-IT Managers: Foundations of e-business

#### **Stanford Center for Professional Development**

Advanced Project Management Program: Mastering the Project Portfolio

#### **COMMUNITY INVOLVEMENT**

Secretary, Texas A&M Corpus Christi National Alumni Board, 2014-2016 President, PEO International, (Philanthropic Education Organization), 2015-2016 Cruising Co-Chair, Corpus Christi Yacht Club, 2015 Leadership Corpus Christi, Class 42, 2013 Parent Board Member, Holy Names Academy, Seattle, WA 2009- 2011 Volunteer, Technology Access Foundation, Seattle, WA, 2008-2010 Board Member, Tri-Cities Corporate Council for the Arts, Richland, WA, 3 years Campaign Team Leader, United Way, Richland Washington, 2 years Business Consultant, Junior Achievement, Richland, WA, 2 years Student Mentor, Partners in Public Education, Seattle, WA, 1 year