#### CORPUS CHRISTI DOWNTOWN MANAGEMENT DISTRICT

\*Two (2) vacancies with terms to 9-30-20 and 9-30-22, representing the following categories: 2 - Agent, Employee or Tenant. (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 Lesley Lomax and Josh Richline.)

#### **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.

					Appointing			
Name	District	Term	Appt. date	<b>End date</b>	Authority	Position	Status	Category
							Exceeded the number of	
							absences allowed by	
*E. Brent Bottom	District 4	Partial	4/10/2018	9/30/2020	City Council		ordinance	Agent, Employee or Tenant
							Exceeded the number of	
							absences allowed by	
*Ajit David	District 4	1	9/22/2015	9/30/2022	City Council		ordinance	Agent, Employee or Tenant
Cherylyn M Boyd	District 1	2	12/8/2015	9/30/2020	City Council		Active	Property Owner
Raymond Gignac	District 4	4	8/21/2001	9/30/2020	City Council		Active	Property Owner
Steve Keenan	District 5	1	9/27/2016	9/30/2020	City Council		Active	Agent, Employee or Tenant
Janet Maxwell	District 4	1	12/18/2012	9/30/2020	City Council		Active	Stock Owner
Cheryl A Votzmeyer	District 1	Partial	4/9/2019	9/30/2020	City Council		Active	Property Owner
Lexi Buquet	District 1	Partial	12/8/2015	9/30/2022	City Council		Active	Resident
Eric R Gutschow	District 5	1	9/12/2017	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
Dee Dee Perez	District 5	3	6/8/2010	9/30/2022	City Council		Active	Agent, Employee or Tenant
Glenn R. Peterson	District 4	3	6/8/2010	9/30/2022	City Council		Active	Property Owner
Harold Shockley Jr.	District 5	2	5/8/2012	9/30/2022	City Council	Chair	Active	Agent, Employee or Tenant
Caitlin Shook	District 4	Partial	4/10/2018	9/30/2022	City Council		Active	Agent, Employee or Tenant

# **CORPUS CHRISTI DOWNTOWN MANAGEMENT DISTRICT**

# **Applicants**

Name	District	Category
		Agent, Employee or Tenant, and
Lesley B. Lomax	District 4	Property Owner
		Agent, Employee or Tenant, and
Joshua Richline	District 2	Property Owner
		Agent, Employee or Tenant, and
Suzelle M Tinnell	District 4	Stock Owner

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

Profile						
Mrs.	Lesley	В		Lomax		
Prefix	First Name		iddle Initial	Last Name		
Email Address						
432 Berm	uda Place					
Street Address						
Corpus C	hristi				TX	78411
City					State	Postal Code
What dis	strict do you live in? *					
<b>₽</b> Distric	ot 4					
Current	resident of the city?					
r Yes ر	· No		e in en antere estados estados e sistemas de interes en interes en interes en interes en interes en interes en	PPT OF MARRIED TO THE PLANE I		THE RESERVE THE SECOND CONTRACTOR SECOND SEC
If yes, he	ow many years?					
32				TOTAL STATE OF THE		
Home: (3	61) 215-0858	Business: (3	<b>61) 462-4</b> 1	121		
Primary Phone		Alternate Phone	<b>-</b>			
Bar Unde	er the Sun, LLC	Owner				
Employer		Job Title				
Work Ac	idress - Street Address	and Suite N	umber			
702 N. C	haparral St.					
Work Ac	ldress - City					
Corpus C	Christi					
Work Ac	ldress - State					
Texas						
Work Ad	ddress - Zip Code					
78401						

Mrs. Leslev B. Lomax Page 1 of 5

Work Phone
361-462-4121
Work E-mail address
lesley@barunderthesun.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?
r Yes r No
Do you currently serve on any other City board, commission or committee at this time? If so, please list:
No
Why are you interested in serving on a City board, commission or committee?
As a downtown stakeholder, I look forward to the opportunity to help guide the development of our unique part of the city, and do my part to ensure it stays on the optimistic path on which I believe it currently is. I have a great deal of personal interest in the well-being of downtown Corpus Christi, as well as experience serving on boards and in charitable groups. In 2016, my husband, Ben, and I purchased 702 N. Chaparral St. & have since then converted the Greyhound Bus Station into what is now 'BUS'an outdoor bar & food truck venue. In 2018 I joined the CCPATCH Board to help restore the Ritz Theatre. Before Ben and I began our investment & business downtown, I was the Marketing Director for 6 years at Bay Ltd., after graduating from Texas A&M University in College Station. Born & raised here in Corpus Christi, and now having a family of our own, it has been such a wonderful experience seeing the growth of our city & the revitalization of our beautiful downtown. I am proud to be to be a part of this growing community and hope my time & efforts can help make an impact on the future of downtown.
Upload a Resume
Are you an ex-Officio member of a City Board, commission or committee?
c Yes c No

Mrs. Leslev B. Lomax Page 2 of 5

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?
r Yes r No
Do you, your spouse, your business or your spouse's business have a City contract?
C Yes C No
Does your employer or your spouse's employer have a City contract?
r Yes r No
Are you involved with any activities or employment that would conflict with the official duties on the City boards for which you are applying?
r Yes r 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
Do you or your spouse have a pending claim, lawsuit or proceeding against the City?
r Yes r No
If you answer "Yes" to any of the questions above, please explain or ask to speak with the City's Legal Department.
N/A

Board-specific questions (if applicable)

Mrs. Leslev B. Lomax
Page 3 of 5

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? \*

#### 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

Mrs. Leslev B. Lomax Page 4 of 5

#### 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.

Ag	ree
	Ag

#### Oath

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

□ Agree

## LESLEY BERRY LOMAX

432 Bermuda Pl. Corpus Christi, TX 78411 - (361) 215-0858 -

# **EDUCATION**

Texas A&M University, College of Agriculture & Life Sciences, College Station, TX – September 2006 - May 2010 B.A. in Horticulture/Minor in Communications Universidad de Belgrano, Buenos Aires, Argentina – May 2009 - July 2009

## **EXPERIENCE**

BUS (Bar Under the Sun, LLC) Corpus Christi, TX – December 2017 - Present *Owner/Operator* 

FIELDBERRY, LLC, Corpus Christi, TX – October 2016 - Present Owner/Operator

BAY LTD., Corpus Christi, TX – November 2011 - November 2017 *Marketing Director* 

- -Responsible for all aspects of marketing/communication
- -Developed branding standards for company and implemented presentation materials for all operating departments
- -Established & managed social media accounts & oversaw marketing analytics
- -Monitored company website with current stats & projects
- -Developed & implemented intern & volunteer programs for the company

LIVESTRONG, Austin, TX – January 2011 - September 2011 Development Intern

- -Helped Team LIVESTRONG market and organize events to engage constituents at all levels
- -Interacted with vendors, sponsors, participants, volunteers and other organizations that work with LIVESTRONG to help produce highly successful endurance events in multiple cities

# **COMMUNITY ENGAGEMENT**

CCPATCH Board, Corpus Christi, TX – May 2018 - Present (Member & Board Secretary)
Charity League, Corpus Christi, TX – May 2015 - Present (Member & Past Fundraising Chair)
Big Brothers Big Sisters, Corpus Christi, TX – May 2012 - May 2014 (Mentor)
LIVESTRONG Volunteer, Austin, TX – October 2011 - October 2013
Kappa Kappa Gamma, Texas A&M University – January 2009 - December 2009 (President)

# **SKILLS**

Marketing Communications, Social Media/Website, Project Management & Fundraising.

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

Profile			
Joshua First Name	Richline Last Name		
Email Address			
1806 3rd St			
Street Address			
Corpus Christi City		TX State	78404 Postal Code
What district do you live in? *			
<b>▽</b> District 2			
Current resident of the city?			
r Yes r No		and the second second second second	THE MENT OF THE COMMENT OF THE COMME
If yes, how many years?			
18			
Business: (361) 760-1015 Primary Phone	Mobile: (361) 510-0561 Alternate Phone		
Richline Technical Services, LLC	Managing Partner		
Work Address - Street Address	and Suite Number		
114 N Mesquite St			COLUMN AND COMMISSION AND AND AND AND AND AND AND AND AND AN
Work Address - City			
Corpus Christi			
Work Address - State			
TX			
Work Address - Zip Code			
78401	······································		

Work Phone
361-882-6297 x 2015
Work E-mail address
jrichline@richline.cc
Preferred Mailing Address
Which Boards would you like to apply for?
CORPUS CHRISTI DOWNTOWN MANAGEMENT DISTRICT: Submitted
Interests & Experiences
Are you a registered voter?
c Yes c 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)
IT Consultant, Business Owner, Active in downtown community and the Corpus Christi Yacht Club
If you applied for multiple boards, which boards are you most interested in serving on, in order of preference? (Limit to top three)
Downtown Management District
Why are you interested in serving on a City board, commission or committee?
To help continue the progress that has been made/is being made in making Corpus Christi a better place to live.
Upload a Resume
Are you an ex-Officio member of a City Board, commission or committee?
r Yes r No
Demographics

Gender
<b>▼</b> Male
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?
r 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?
r Yes r No
Are you involved with any activities or employment that would conflict with the official duties on the City boards for which you are applying?
C Yes & 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
Do you or your spouse have a pending claim, lawsuit or proceeding against the City?
C Yes & No
If you answer "Yes" to any of the questions above, please explain or ask to speak with the City's Legal Department.
N/A

Board-specific questions (if applicable)

Cuestion 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? \*

✓ Property Owner
✓ Agent Employee or Tenant

Verification

City Code Requirement - Residency

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✓ 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

✓ I Agree

next meeting after the absence.

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	Agree
--	-------

#### Oath

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

□ I Agree



# **Executive Summary:**

Started Richline Technical in 2001 with my brother as a partner. Grew the company with zero debt eventually adding on a third partner. Balanced multiple roles within the company acting as Managing Partner for several years in the late 2000's and again now. The other partners are now completely or most "inactive" in their roles in the company.

# **Project Manager/Technician/Sales Engineer (2001-2006):**

- Maintained many client networks including the Convention and Visitors
  Bureau & Chamber of Commerce to Perry and Haas & Sorrell, Anderson and
  up to 100 other clients both locally and regionally.
- Citrix certified since 2001-We were the only Citrix shop south of Houston for quite a while
- Collectively grew company from two people to seven with zero debt
- Notable Projects include: Network design and build for CB Surgery Center, Document management projects for Pearson & Price (now Branscomb, PC) and Langley and Banack (in San Antonio).

# Managing Partner (2006-2009):

- Acquired and renovated our new building and went through fairly rapid growth
- Negotiated the acquisition of Pyramid Communications expanding our service offerings to include phone systems and structured cabling services
- Grew from seven to more than 15 employees
- Helped our clients save money during the economic downturn by outsourcing their IT utilizing Managed Services and taking advantage of early virtualization initiatives.
- Streamlined company operations, renegotiated existing contracts and saved money where we could
- Oversaw a highly effective helpdesk operation with high customer satisfaction

#### **Business Development (2010-2016):**

(Let the other 2 partners "run" the company while I focused on building specific lines of business primarily based around the recently acquired Pyramid Communications)

- Modernized Pyramid Communications service offerings from installing and supporting mostly Nortel digital systems to Nortel VoIP and ShoreTel UC system and eventually some hosted VoIP.
- Expanded Pyramid Communications through marketing efforts and integration into existing client base



- Gained recognition by ShoreTel for high customer satisfaction
- Acquired new lines of business including LifeSize, Ruckus, and Aruba.
- Notable large VoIP networking projects include:
  - Network design, new ISP/phone company, new phone system simultaneous switchover for Mission Parks 13 locations in San Antonio and Houston
  - o The network rebuild and new building buildout for City of Kingsville
  - o The network infrastructure build for the M&G plant
  - o Meanwhile maintaining phone systems and networks for up to 100 businesses/entities
- Brought on new purchasing agreements which allowed us to secure and maintain government contracts
- Continued to help meet the mobility needs of our clients and the rise of BYOD through our partnerships with ShoreTel and Citrix
- Pushed standardization of solutions in order balance customer needs and staff training demands
- Achieved high profits during 2014-2015 without major growth in personnel mostly due to these large projects I was securing.

# Managing Partner (2017-2018):

(during this period the 2 other partners become more silent partners due to life events)

- Pushed training of existing staff
- Re-Emphasized customer service within the tech room and addressed concerns around prioritization of tickets and ticket gueues.
- Worked closely with techs to foster team environment and increase customer satisfaction
- Cut costs and managed budgets with two non-participating business partners
- Implemented new contract documents to standardize customer contracts and manage client expectations
- Trimmed out clients that were draining resources, reorganized processes and staff to make us more efficient and then began ramping back up sales and bringing on new clients

# Other Noteworthy Accomplishments/Roles:

 Navigated several government purchasing contracts/vehicles to be able to support/sell to counties, cities, and school districts. Juggled several at once in selling ShoreTel, LifeSize and others. Currently supporting a NASPO Valuepoint (formerly WSCA-NASPO) contract, DIR (State of Texas) and NCPA (National Cooperative Purchasing Alliance)



- Brought on new distributors and new products and implemented staff training the staff on them.
- Consistently looked for methods to save clients' money and make them more efficient. Brought on Intelisys as a way to shop the market for clients' needs to save them money and give us more reoccurring revenue (commissions) for things they were already buying other places (Internet, DialTone, Cloud, etc...)
- Launched new initiatives driven by client needs and market trends--Reinvented the company as necessary to keep up with the changing market.
- Managed acquisitions, divestitures, contract negotiations and even threat of lawsuits

#### **Certifications:**

- Microsoft (MCP's & MCSA's of varying vintages)
- Citrix XenApp (CCP) and XenServer
- Citrix Sales
- Mitel Certified Engineer (UCSE), Certified System Installer (UCSI), Certified System Programmer (UCSP)-current (since 2010)
- (Mitel)ShoreTel Mobility Certified (SMSI)
- Mitel Sales and Solution Architect (SSA)
- Sonicwall CSSP & CSSA-current
- LifeSize Certified Technical Expert (LCTE)
- Ruckus (WiSE) Wireless Certified
- WorlDox Installer (Document Management)
- Intelisys Super9 Graduate
- Entreleadership Graduate

#### **Volunteer and Board Positions:**

Corpus Christi Yacht Club Board of Directors 2015-2017

Corpus Christi Yacht Club Race Chair 2018

Corpus Christi Yacht Club Education Chair and Protest Chair 2019

MORF Board Secretary 2013-2014, Fleet Captain 2015

Volunteer Technical Services for HEB Feast of Sharing since 2014

IT Coordinator for World Youth Sailing Championship 2018

IT Coordinator for the Etchells World Championship 2019



Pints with Pups on Patios (a "Pup Crawl" in Downtown Corpus Christi) Coordinator since 2018

Corpus Christi Under 40 recipient 2019

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

**Profile** Suzelle М Tinnell First Name Middle Initial Last Name Email Address 5541 Ocean Drive Street Address Corpus Christi  $\mathsf{TX}$ 78412 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 Director, Enterprise Planning & American Bank Alignment Employer Work Address - Street Address and Suite Number 800 N Shoreline Blvd, Ste 2N Work Address - City Corpus Christi Work Address - State Texas Work Address - Zip Code 78401

Work Phone

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.

upinad a Resume

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

Yes ← 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 c No
Do you, your spouse, your business or your spouse's business have a City contract?
c Yes c No
Does your employer or your spouse's employer have a City contract?
c Yes c No
Are you involved with any activities or employment that would conflict with the official duties on the City boards for which you are applying?
⊂ Yes ເ 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?
c Yes c No
Do you or your spouse have a pending claim, lawsuit or proceeding against the City?
⊂ Yes ເ No
If you answer "Yes" to any of the questions above, please explain or ask to speak with the City's Legal Department.
I did not answer "yes" to any of the questions above, but the form required me to complete this section.
Board-specific questions (if applicable)

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

Agent Employee or Tenant

## Verification

City Code Requirement - Residency

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□ Agree

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□ Agree

Suzelle M Tinnell Page 4 of 5

#### Consent for Release of Information

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✓ 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 Director, Enterprise Planning and Alignment (2017-Present)

2012-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