

Objective: Leverage expertise in business, process improvement and finance to aid the Commission on Aging.

**Qualification Metrics**

**Areas of Expertise**



An innovative systems thinker with comprehensive experience improving operational performance in the corporate, public and nonprofit sectors.

Served as an auditor and business manager, overseeing employee and organizational efficiency. Chief delegate overseeing strategic planning, project management and continuous improvement for \$23M division.

Nonprofit expertise as Administrator and Board Chair steering strategy, solvency, accountability, sustainability, and growth.

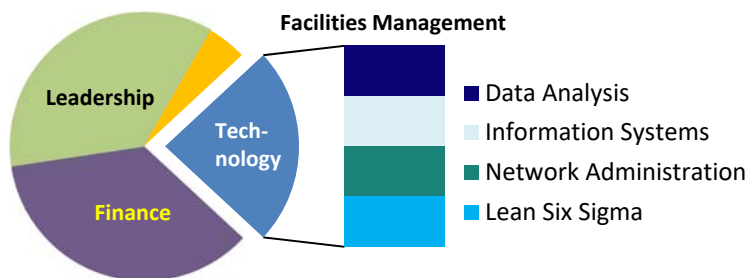
Strong problem-solving, presentation and communication skills essential to leading collaborative teams.

- |                          |                                |                      |
|--------------------------|--------------------------------|----------------------|
| ✓ Strategic Planning     | ✓ Business Process Improvement | ✓ Financial Analysis |
| ✓ Continuous Improvement | ✓ Operations Management        | ✓ Financial Modeling |
| ✓ Project Management     | ✓ Team Leadership              | ✓ Customer Service   |

**Results-Oriented Performance**

- Designed and deployed a dashboard, empowering Superintendent and Chiefs to administer operational plan containing 138 mission-critical initiatives steering a \$928.3 million district operating budget.
- Developed a comprehensive financial model to forecast wage increases across all areas of operations, empowering leadership effectively to develop a \$6.5 million annual budget for part-time staff.
- Managed cross-functional project teams through implementing an electronic time and attendance solution for 182 sites, integrated with PeopleSoft Payroll and resulting in greater efficiencies and reduced processing errors for 2000 employees.
- Managed a special project team to successful building of departmental cost recovery model, including requisite program service category optimization and Administration’s adoption of cost recovery goals. Updated current pricing policy congruent with equitable accommodation of diverse customer needs.
- Standardized training for 75 state and regional government offices across the country by developing and integrating computer based training (CBT) that effectually championed a major U.S. Presidential Initiative.

**Education & Professional Development**



Concordia University Wisconsin  
Mequon, Wisconsin

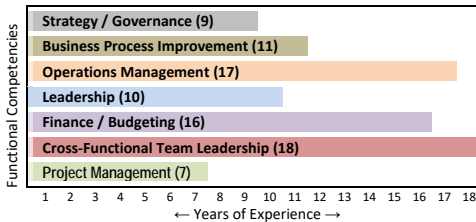
✓ **MS in Leadership**, 4.0 GPA  
(70% coursework completed)

Marquette University, 1990  
Milwaukee, Wisconsin

✓ **BS in Business Administration**  
✓ Major: **Finance**

- |                                |                                  |                            |                            |                         |
|--------------------------------|----------------------------------|----------------------------|----------------------------|-------------------------|
| • Lean Six Sigma               | • Financial Accounting           | • Financial Management     | • Business Information Sys | • Risk & Insurance      |
| • Finite Mathematics           | • Managerial Accounting          | • Adv Financial Management | • Management Info Sys      | • Operations Management |
| • Business Statistics          | • Financial Analysis & Budgeting | • Investment Analysis      | • Microeconomics           | • Bank Management       |
| • Advanced Business Statistics |                                  | • Investment Management    | • Macroeconomics           | • Business Policies     |

## Professional Experience



- Internal audit, bank, trust, construction, and IT operations
- Accounting systems and standards
- Financial modeling, budgeting, cost recovery, and data analysis
- Facilities management, site supervision, warehouse operations
- Change management and business process improvement

### CURRENTLY APPORTIONED RESPONSIBILITIES

#### Fiscal Management, 20%

- Cost analysis for program operations to determine need for investment or divestment.
- Evaluate and monitor performance and efficiency to ensure programs and financial goals are on target.
- Prepare various reports covering budget status, forecasting and principal financial & data analysis.
- Assist in the preparation of long-term financial forecast of revenue, expenditure and cost-recovery.

#### Process Improvement, 30%

- Oversee department program evaluation and strategic planning for division with \$23M operational budget.
- Project management for technology and business initiatives from concept through implementation.
- Continuous process improvement using Lean Six Sigma methodologies.
- Research problems and identify ways to improve or enhance processes, policies and procedures.

#### Collaboration & Strategy, 30%

- Collaborate with department colleagues to enhance department programming.
- Liaison between IT, Operations and cross-functional units within the organization.
- Represent the department on community councils, committees and advisory groups.
- Support work teams in establishing and maintaining business processes, procedures and policies.
- Develop, design and establish reporting standards, including aligning strategy with accreditation standards.
- Actively support Strategic Plan, including District-wide operations planning and overseeing department initiatives.

#### Technology, 20%

- Manage complex projects and cloud-based solutions to improve efficiencies (2000 part-time employees in 182 sites).
- Facilitate data-based decisions by designing apps, databases, SQL queries, systems, infrastructure, dashboards, etc.
- Create and maintain department databases, pivot tables & scripts, including support & conversion of legacy systems.

### FINANCIAL PROWESS

#### M&I MARSHALL & ILSLEY BANK

Milwaukee, Wisconsin

#### **Audit Services Specialist / Management Trainee, (07/1986 – 10/1991)**

Reviewed and evaluated business risk, executed audit plans and suggested process improvements that reflected industry Best Practices, championed operational compliance and improved business strategy.

- Financial, operational and regulatory audits of subsidiary banks and trust operations across the state.
- Audited key business operations and prepared audit working papers and reports.
- Evaluated business risks, executed audit plans and suggested process improvements & best practices.
- Budget consolidation and financial reporting for 20 subsidiaries to foster data driven decisions.
- Processed and reconciled payments on Deposits and Loan systems.
- Provided operational support for Payroll, Corporate Accounting, IRA, and Trust Operations departments, including financial analysis, reporting and modeling, research, and posting transactions.

#### HERITAGE INTERNATIONAL

Milwaukee, Wisconsin

#### **Administrator / Trustee Board Chair, (04/2008 – 04/2012)**

- Trained and supervised operations for members, volunteers and 8 direct reports.
- Led the Board of Trustees in corporate governance, strategic planning, policy and procedures.
- Supervised the Financial Secretary in administering GAAP, cash handling, banking, and financial reporting.

- Facilitated planning, evaluation and improvement of administration, operations and budgeting.
- Facilities management including schedules, improvements, repairs, maintenance, building inspections.
- Converted paper bookkeeping to QuickBooks, integrated online banking, drafted the business plan, IDPs (independent development plans), wrote position descriptions, and established policies and procedures.

MEGA

Milwaukee, Wisconsin

**Business Manager, (10/2004 – 01/2009)**

Oversaw office administration, operations and site supervision for residential rehab, remodeling, construction, and property management functions. Established SOPs in compliance with regulation, statute, loan covenant, and corporate policy. Scheduled and managed contractors, resources and procurement. Assembled project teams consisting of trade professionals (electrician, plumber, HVAC, carpenter).

- Negotiated contracts with contractors and vendors. Hired, trained, coached, and evaluated staff.
- Developed an innovative procedure for collecting monthly rental remittances, using automated sweep accounts and electronic funds transfers (EFT) which improved efficiency and reducing float by 10 days.
- Converted paper-based accounting to QuickBooks, including writing custom scripts to import and format banking history and eliminating duplicate data entry through integration of computerized check printing.
- Executed and improved accounting practices, including budgeting, job costing and financial reporting.
- Managed procurement for office and construction supplies (building materials), tool and equipment.
- Printed checks for payables including payroll for contractors, W9 processing and 1099 reporting.
- Developed technical scopes of work, standard operating procedures, policies, and financial reports.

**BUSINESS & STRATEGY**

MILWAUKEE PUBLIC SCHOOLS (MPS)

Milwaukee, Wisconsin

**Administrator, (06/2014 – Present)**

Administrator in the Office of Finance focusing on strategic planning, project management, data analysis, and continuous business improvement. Using project management and Lean Six Sigma tools and methods to solve cross-functional business problems in the areas of operations, strategy, technology, and budgeting. Advanced data analysis and reporting from PeopleSoft, IFAS. Coordinate department migration to Infor.

- Designed and deployed a dashboard, empowering Superintendent and Chiefs to administer an operational plan containing 138 mission-critical initiatives steering a \$928.3 million district operating budget.
- Developed a comprehensive financial model to forecast wage increases across all areas of operations, empowering leadership effectively to develop a \$6.5 million annual budget for part-time staff.
- Managed special project team to successful build of department's cost recovery model, including program service category optimization and Administration's adoption of recommended cost recovery goals.
- Managed application development, technical services, database administrator, and functional team in deploying online application for successful administration of \$1.5 million in annual grants.
- Coached project managers from various business units to bridge enterprise-wide gaps between employee satisfaction, engagement and customer satisfaction by creating SOPs, audits, employee recognition programs.
- Led project team in migrating company website from 260 static HTML pages to dynamic CMS content, resulting in 1,500 sessions per day, 56% returning users and new mobile-friendly responsive design.

RLWC

Milwaukee, Wisconsin

**Director of Training, Facilities & Services, (04/2012 – 09/2014)**

Managed administration of training, facilities and services by engaging 25 volunteers and direct reports. Oversaw building operations, including security, maintenance, cleaning, snow removal, and construction. Developed training upon assessing instructional needs of both a 20-person team and clientele.

- Raised capital and managed volunteers in expanding media center, doubling square footage, increasing functionality, and adding technologies, i.e. equipment and monitors to improve marketing and operations.

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

Milwaukee, Wisconsin

**Acting Administrative Officer (concurrent with core duties 10/1991 – 9/2002)**

Daily assistance with delegated authority during absence of Director of Administration. Managed administrative workload, including overseeing operations, position management, time & attendance, mail, procurement, \$1M ADP inventory, recruiting & hiring, and resource allocation (annual budget appropriation: \$40K travel, \$20K equipment, \$6K training, \$20K office supplies, \$25K other services.)

- Supervised 6 direct reports (5 hours per week for 11 years)
- Received cash award for leading team in the efficient redesign of a 675 sq. ft. stockroom using Lean 5S.
- Coordinated all major office-wide moves, as well as painting, carpeting and network cabling projects involving relocation of staff, furniture and equipment for 7 departments. (Project lead)
- Regularly served on project teams facilitating employee relations, office moves and change management.
- Facilitated trainings for Employee Assistance Programs, Benefits Open Enrollment, Individual Development Plans (IDPs), and Distance Learning for 125 employees in the local agency office.

**TECH SAVVY**

AE BUSINESS SOLUTIONS

Milwaukee, Wisconsin

**Desktop Support Technician at Milwaukee Publics Schools (MPS) Central Services, (04/2013 – 06/2014)**

Administered daily break/fix operations for 48 departments throughout Central Office, empowering 550 staff to support school operations. Known for providing outstanding customer service, which allowed Central Office staff to support 10,000 district-wide employees and 77,000 students across 160 schools.

- Installed, supported and wrote documentation for desktop computers, laptops, handheld devices, & printers.
- Improved Six Sigma process flow by 20% via mitigating root cause for scanner installation delay, effectively helping streamline procurement process for 160 schools. (Improved routine, speed and documentation)
- Developed comprehensive Business Resumption Plan for Duplicating Services department, mitigating loss due to catastrophic event or equipment failure and safeguarding 17 million page annual print volumes.

U.S. DEPARTMENT OF HOUSING AND URBAN DEVELOPMENT

Milwaukee, Wisconsin

**Information Technology Specialist, (10/1991 – 10/2004)**

Administered enterprise-wide expert technology services and support to internal and external customers, including cross-functional teams, management, end users, database/network administrators—for 125 local users and Tier 2/Tier 3 support (1,000 regional users, and 14,000 nationwide users across 75 offices). Served as IT security officer, evaluated technologies, developed troubleshooting, installation and rollout strategies, data analysis, reporting, and presentations as a liaison to IT and management. Supervised direct report and the computer support group workload (7 FTEs). Approved all local computer operations and wrote recommendations in accordance with regulation, policy, procedures, and industry best practices.

- Managed 7 computer support group personnel; network administration; staff training; software and \$1 million inventory of hardware including desktop, notebook, server, peripheral and LAN/ WAN devices.
- Spearhead project team in cost-effective design and construction of 750 sq. ft. training room with latest technologies to champion distance learning and onsite training for department and local federal agencies.
- Received cash award for leading project team in satellite dish installation, effectively leveraging distance learning opportunities and reducing training/travel expenses. (Designed and coordinated installation, obtained building permit, trained staff, provided standards for nationwide implementation in 50 offices.)
- Recognized by Washington DC for initiating and developing an innovative multimedia software solution that championed a major Presidential Initiative and standardized training for 75 HUD offices across the U.S.