

FINANCE EXECUTIVE

Drive Finance & Business Performances into Competitive Advantages for Healthcare & Insurance Providers through Vision and Revenue-Generating Operational Leadership

Dynamic executive leadership career in international, billion dollar organizations with a rich mix of finance, operations, internal/external processes, technical savvy and business development. Intimate knowledge of financial processes, operating results and profitability. Expert in executing team-driven process improvements to increase revenue growth operational efficiency, and overall profitability. Executive MBA. Expertise in:

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| <input checked="" type="checkbox"/> Financial & Procurement Controls | <input checked="" type="checkbox"/> International Sourcing, Operations & Finance |
| <input checked="" type="checkbox"/> Contract Negotiations & Procurement Controls | <input checked="" type="checkbox"/> Technology & Process Implementation |
| <input checked="" type="checkbox"/> Strategic & Financial Planning | <input checked="" type="checkbox"/> Start Ups, Turnaround & Revitalization |

EXPERIENCE & ACCOMPLISHMENTS

BLUE SHIELD OF CALIFORNIA, San Jose, CA 2009 to Present
HMO provider with annual revenue of \$8 billion and over 5,000 employees.

Director of Finance & Vendor Management

Promoted to the CFO role for the finance and vendor management function of the Shield Advance Program, a \$500 million infrastructure redesign program focused on claims, portals, product and IT infrastructure support. Created strategic plans to improve profitability and a tool monitor benefits realization. Direct and develop financial models, space and capacity planning, and supplier rationalization and vendor plans to ensure performance indicators. Supervise 16 staff in 4 departments. Present regularly to corporate CFO and CEO on financial progress of program.

ENTERPRISE IMPACT:

- Created and divided the organization into a two-phased restructuring approach—1st phase to centralize the finance/vendor management functions, 2nd was to automate key processes to reduced dependency on manual processes and staff positions. **The restructure netted over \$500,000 in annualized savings.**
- **Key member of the program's leadership team** that built out the first business cases and secured funding approval.
- Partner with executive management, business and IT to **develop the annual financial business plan** to gain buy-in.
- **Uncovered over \$12 million in cost saving opportunities** through revision of staffs internal and external resources, negotiating consulting fees, and facilitating substantial business reinvestment.
- **Identified over \$5 million in cost reductions** by implementing a transaction-level accounting reporting system that allows for greater transparency.

KAISER PERMANENTE, Concord/Oakland/Walnut Creek, CA 2000 to 2009
Healthcare provider and health insurance company with annual revenue of \$38 billion and over 150,000 employees.

Executive Director, National IT Compliance (2005 to 2007)

Governed all aspects of the \$1.4 billion IT Division that supported all healthcare systems. Partnered with IT leadership and company execs to gain buy-in for new processes and procedures and support program. Supervised 22 staff.

ENTERPRISE IMPACT:

- **Met the challenge of turning around the division** to focus on compliance, financial stability, audit integrity and productivity increases. Implemented SOX 404 for IT to include testing over 500 key applications.
- **Saved over \$1 million** while improving audit activities with the Compliance Organization Rebuild Project that redefined positions, creating new processes, and enhanced training.
- Ensured compliance with procurement processes, renegotiated supplier contracts, and analyzer the supplier base which resulted in **over \$5 million in savings.**
- Consolidated audit and remediation activities to support SOX 404 which reduced the need for additional staff and **decreased costs by \$5 million.**
- **Set the precedence for the vendor community** in the Bay Area by aggressively negotiating with vendors to reduce the number of professional services suppliers and **saved \$25 million.**

Corporate Senior Manager, Finance Shared Services Organization, Buy to Pay (2003 to 2005)

Promoted as the point person to build the new Shared Services Department of the Finance Shared Services Organization in Corporate Finance that maintained delivery of \$8 billion in transactions. Directed general finance, controllership, and accounting. Utilized Six Sigma initiatives. Served as the Program Finance professional and instilled reporting discipline.

ENTERPRISE IMPACT:

- **Drove \$5 million in annual savings** through financial analysis and project planning.
- Mapped out departmental process to transactional activities and set up an activity-based costing framework, saving company over \$5 million.
- **Put into place company's initial SOX 404 program** and reduced financial exposure from poor accounting practices by more than \$25 million.

Financial Leader, Financial Shared Services & IT Procurement, Hospital IT Division (2002 to 2003)

Administered a \$70 million departmental budget with 45 staff. Integrated IT procurement, strategic financing, asset management, material management services, vendor managements shared services, human capital resource management and facilities during department restructuring.

ENTERPRISE IMPACT:

- Eliminated unneeded projects and combined under-utilized facilities **cutting \$5.25 million from facilities** management.
- **Reduced purchase order exposure from \$90 million to \$5 million** and decreased days outstanding from 100 to 45 after revamping the e-procurement system and processes.
- Saved over \$250,000 annually through centralization of management of more than 400 IT contracts worth \$500 million, which eliminated storage waste and decreased access time.

Operations Finance Leader, Network Services and Distributed Computing, Hospital Division (2000 to 2002)

Oversaw finance, accounting, asset management and material services for a \$300 million division. Supervised 18 staff. Piloted department's first capital acquisition and requisition tracking process.

ENTERPRISE IMPACT:

- **Eliminated more than \$2 million in capital expenditures** through installation of a new capital order process, centralizing the division's procurement and eliminating duplicate ordering
- Increased cash flow by **\$5 million** by re-evaluating the lease vs. buy strategy of assets.

MARRIOTT INTERNATIONAL, Washington, DC

1994 to 2000

International hotel chain with more than 150,000 employees worldwide and \$25 billion in revenue.

Director of Finance, Panama Marriot Hotel, Panama City (1998 to 2000)

Controller, El Paso Marriott (1996 to 1998), Senior Assistant Controller, Denver Tech Center Marriott (1996),

Assistant Controller, Albuquerque Marriot Hotel, New Mexico (1994 to 1995)

Steady advancement at Marriott due to consistent, performance-driven successes. Promoted to manage the start up in Panama City and all general finance, IT, and accounting. Created business plan and supervised 12 staff.

ENTERPRISE IMPACT:

- Collaborated with Sales and Marketing to **increased room revenues \$2 million annually** by revising rate structures and providing special corporate incentives.
- **Negotiated line of credit extendible to 5% of revenues** with local financial institution, allowing the hotel to open even though the owners were only able to secure 7% of their stipulated working capital.

EDUCATION & AFFILIATIONS

Executive MBA, PEPPERDINE UNIVERSITY, Malibu, CA

BS, Finance & Business, University of Texas, El Paso, TX

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Leadership Board, Pepperdine Graduate School of Business, Director of Sponsorships, Current

BOD & Interim CFO, Tamarisc, Inc (start-up biotech firm), 2009-2013

BOD, Local Interest Group in San Francisco for itsMF, 2007-2009