

## **Finance Advisory Committee- 3 Applications**

Keith Jones

Andrew Lachman

Randall Lentz

## Application Form

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### Profile

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### Ethics and Avoidance of Conflicts of Interest

As a reflection of the residents of the community, Culver City prides itself on the high ethical standards adhered to by its municipal government. As a prospective applicant, we want you to be informed about potential limitations that state and local law impose on individuals who serve the community, especially where they may have a financial conflict of interest. Please consider this information before submitting an application and accepting an appointment. Further information and training regarding these limitations, as well as other legal and procedural requirements when serving on these bodies (i.e. Brown Act, ethics laws, etc.), will be provided in the event you are appointed to one of the City's commissions, committees, or boards.

State law has established regulations intended to ensure that a public official does not use his or her position for personal, financial benefit.

- The California Political Reform Act prohibits a public official (including any of the City's commission, committee, or board members) from participating in any decision or deliberation that might affect the official's own financial interests. In such a situation, the official must publicly disclose the potential conflict of interest, recuse himself or herself from the item being discussed, and leave the meeting room while the matter is considered.
- Government Code Section 1090 imposes an even stricter prohibition. It prohibits a local body from "making" a contract with one of its own members (even if the member has recused him or herself), which includes all aspects of contract formation, including such actions as influencing the contract's scope or the selection of a contractor.

A community member volunteering to sit on a City commission, committee, or board should be aware of these restrictions and take them into consideration before applying for or accepting appointment to any of these bodies.

If you have questions about this information and how it may apply to your particular situation, please contact the City Attorney's Office at (310) 253-5660.

### Important Information

As you complete your application, please be aware of the following:

You may attach a resume or other supplemental information. However, at a minimum, please ensure you submit this Application form by the applicable deadline.

Please note that certain bodies have additional supplementary questions that pertain to that particular body.

If appointed to a body, please be aware that:

- Important: Unless a specific exception is made by the City Council, generally individuals are

eligible to be appointed to serve on only one body at a time.

- All appointees will be required to attend an Ethics and Brown Act training class, which will be offered through the City Attorney's and City Clerk's Offices.
- State law and the City's Conflict of Interest Code may require you to file annual financial disclosure forms.
- Meeting dates and times of the various bodies are subject to change at the City Council's discretion, staff requirements and the availability of the meeting facilities.
- Please note that you may be subject to a background check. A conviction does not preclude you from being considered for a commission, board or committee appointment.

Please be advised this document is a public record and information contained herein may be subject to public disclosure as required by the California Public Records Act and any other applicable law.

**Which Boards would you like to apply for?**

- ☒ Finance Advisory Committee  
☐ Landlord Tenant Mediation Board

If you are applying for more than one body, please list those bodies in the order of preference for which you would like to be considered below.

Keith Jones  
First Name Last Name

[Redacted Address]

City State Postal Code

**Are you a Culver City resident?**

☒ Yes ☐ No

If you are a resident of Culver City, please list how many years:

25 years

[Redacted Address]

**Are you a Culver City business owner/operator?**

☒ Yes ☐ No

If you are a Culver City business owner/operator, please list how many years.

30 years

Are you registered to vote in Culver City? (Certain bodies currently require its members to be registered voters.)

☒ Yes ☐ No

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### Demographics

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### Qualifications and Experience

Have you ever worked for the City of Culver City?

☐ Yes ☒ No

If you have worked for the City of Culver City, please list dates of employment and names of departments.

If you are related to any current City employees or appointed officials of the City of Culver City, please indicate name(s) and relationship(s).

Have there been, or are there now, any circumstances and/or relationships which might reflect adversely on the propriety of your serving as a member of any body to which you might be appointed?

☐ Yes ☒ No

If yes, please explain:



Community Service (List commissions, boards, committees and other organizations on which you have served or currently serve, are a member or have been a member and offices held and in what city those positions were or are held). Please feel free to include participation in community events. Please highlight Culver City community involvement:

Culver City Rotary Club member 20 years. Past Treasurer & club President, Culver City Rotary Community Foundation past President & Treasurer. Board member Culver City Chamber of Commerce.  
Employment. Please provide a minimum of 5 years of employment history, including titles and duties of current and past employment. Please feel free to attach a resume or CV in lieu of completing this section:

Former CPA with Public Accounting Firm Deloitte. Owner of Culver City Small Business for over 30 years - Marina Martial Arts.

Education (Include professional or vocational licenses and certificates.) Please feel free to attach a resume or CV in lieu of completing this section:

Bachelor of Arts Economics & Business from UCLA  
Certified Public Accountant (CPA) in California (License Inactive)  
Real Estate Brokers License - California  
Certificate in Real Estate Investments from UCLA

[Upload a Resume](#)

## Application Questions

For the body(ies) to which you seek appointment(s), what have you determined to be the primary role of the body?

Finance Advisory Committee role in Culver City is to give citizens an opportunity to oversee and participate in our city's financial planning and oversight.

Why do you seek appointment on the body(ies)? Please be specific to the body(ies)'s role.

I feel as a long-time business owner & former CPA I will be a valued sounding board for the committee's ideas and oversight.

What is there specifically in your background, training, education or interests that qualifies you for appointment? What special qualities and/or qualifications can you bring to the body(ies) to which you seek appointment(s)?

As a former Auditor (CPA) with one of the world's largest Accounting Firms, I conducted audits of city finances for various local governments.  
How do you envision your fulfilling the objectives, and/or goals of the body(ies), as established by the City Council?

I will be available for all meetings and will seek to understand what is not clearly defined.

How many meetings of the commission(s), board(s), or committee(s), to which you are interested in being appointed have you attended? Please indicate how often and when.

I attended many meetings of the Finance Advisory Committee when I first moved to Culver City years ago.

How much time, on a monthly basis, can you commit to reviewing materials in preparation for attendance at meetings of the body(ies) to which you desire appointment?

My schedule is flexible and I will make myself available for all meetings and will perform necessary review in advance of all meetings.

Is there anything else you would like to add that has not been covered by your answers to the prior questions? (You may attach supplemental information below.)

none AT THIS TIME

Please upload a file to attach supplemental information, if desired.

You are invited to attach additional pages, enclose a copy of your resume and/or submit supplemental information which you feel may assist the appointing authority in its evaluation of your application.

Please submit your application and any attachments no later than the final filing date as announced in the Notice of Vacancy and Request for Applications to the City of Culver City by submitting your application online or

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Culver City, CA 90232

By Fax: (310) 253-5830

By Email: city.clerk@culvercity.org

If you have questions regarding the completion or filing of this application, please contact the City of Clerk's Office, by fax or email as indicated above, or by phone at (310) 253-5851.

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### Outreach Question

The City Clerk's Office is always looking to improve outreach. Please indicate how you heard about this opportunity.

~~None Selected~~ recommended by community members

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### Supplemental Questions

Question applies to Landlord Tenant Mediation Board

Please select the Category for which you are applying to the LandLord Tenant Mediation Board \*

None Selected

Question applies to Parks, Recreation and Community Services Commission

How many meetings of the Parks, Recreation, and Community Services Commission have you watched on cable or via the internet in the last year? What was your impression of those meetings? What, if anything, would you change?



Question applies to Parks, Recreation and Community Services Commission

**What Parks, Recreation and/or Human Services experience would you bring to the PRCS Commission?**

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Question applies to Parks, Recreation and Community Services Commission

**What makes the PRCS Commission the commission that you want to be on, as opposed to being a member of any of the other Commissions, Committees, and Boards?**

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Question applies to Bicycle and Pedestrian Advisory Committee

**Please ensure you meet the qualifications below for the membership category(ies) for which you are applying. Please select the Category for which you are applying to the Bicycle and Pedestrian Advisory Committee**

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None Selected

Question applies to Finance Advisory Committee

**Please ensure you meet the qualifications below for the membership category(ies) for which you are applying. Please select the Category for which you are applying to the Finance Advisory Committee:**

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None Selected

Question applies to Finance Advisory Committee

From the City Council approved "Finance Advisory Committee Bylaws:

"Business Community Member: Shall own or be the primary operator of a duly licensed business located within the City limits.

Please call the Finance Department at (310) 253-5865 if you have any questions regarding eligibility for Finance Advisory Committee positions.

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**Thank You**

The City Clerk's Office encourages all interested persons to apply for all positions in which they have an interest!

## Application Form

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**Which Boards would you like to apply for?**

Finance Advisory Committee: Submitted

**If you are applying for more than one body, please list those bodies in the order of preference for which you would like to be considered below.**

Finance Advisory Committee

Andrew  
First Name

Lachman  
Last Name

**Are you a Culver City resident?**

☒ Yes ☐ No

**If you are a resident of Culver City, please list how many years:**

4

**Are you a Culver City business owner/operator?**

☒ Yes ☐ No

If you are a Culver City business owner/operator, please list how many years.

1

Are you registered to vote in Culver City? (Certain bodies currently require its members to be registered voters.)

☒ Yes ☐ No

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## Demographics

Other information you wish to share.

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## Qualifications and Experience

Have you ever worked for the City of Culver City?

☐ Yes ☒ No

If you have worked for the City of Culver City, please list dates of employment and names of departments.

If you are related to any current City employees or appointed officials of the City of Culver City, please indicate name(s) and relationship(s).

Have there been, or are there now, any circumstances and/or relationships which might reflect adversely on the propriety of your serving as a member of any body to which you might be appointed?

☐ Yes ☒ No

If yes, please explain:

**Community Service (List commissions, boards, committees and other organizations on which you have served or currently serve, are a member or have been a member and offices held and in what city those positions were or are held). Please feel free to include participation in community events. Please highlight Culver City community involvement:**

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Member, Culver City Chamber of Commerce 2019 - LACBA, Culver Marina and Century City Bar Associations, Member 2019 - Member, Culver City Cultural Affairs Foundation 2014-2015 Member and Vice President of Los Angeles City Quality & Productivity Commission 2010-2013. MidCity West Community Council 2004-2010 Chair 2008-2009 - attended LA City Budget workshops. Vice Chair 2006-2008 Chair Bylaws 2006-2008 - Chair Public Safety 2005-2006 - Member - Renters Representative 2004-2006, Government Representatives 2006-2009

**Employment. Please provide a minimum of 5 years of employment history, including titles and duties of current and past employment. Please feel free to attach a resume or CV in lieu of completing this section:**

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2017-2019 Attorney - Lachman Law, a Professional Corporation, provided legal services to technology startups and small businesses regarding corporate, licensing and privacy matters. 2015-2016 Legislative Director, Congressman Ted Lieu, managed legislative agenda for freshman Congressman, handling arts, parks, budget, government operations and technology-related issues. Served as primary staff for House Budget Committee and worked with local cities on budget and funding issues. 2014 - Political Director Ted Lieu for Congress 2011-2012 Senior Legal Counsel OSI Consulting provided counsel and advise on transactional and HR issues for a multinational technology services company. 2009-2011 Consultant Joint Committee on the Arts. Managed committee hearings and legislation on arts and arts funding issues including organizing hearing in Culver City on creative economy and education. Also served as Senator's field representative to Westside, Culver City and Hollywood.

**Education (Include professional or vocational licenses and certificates.) Please feel free to attach a resume or CV in lieu of completing this section:**

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Harvard University John F Kennedy School of Government Emerging Leaders Program 2013 JD George Washington University Law School 1998 BA Communications and Political Science, American University 1992

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[Upload a Resume](#)

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## Application Questions

**For the body(ies) to which you seek appointment(s), what have you determined to be the primary role of the body?**

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Review of the revenues and expenditures of Measure Y, Measure CW, and Measure C funds consistent with the City Council Adopted Budget, as well as proposing and reviewing changes to other revenue sources and other government efficiency matters.

**Why do you seek appointment on the body(ies)? Please be specific to the body(ies)'s role.**

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As a business owner who relocated to Culver City because of the great city services and business license tax that are reasonable compared to Santa Monica and Los Angeles. I have a particular interest in continuing to build Culver City as a community tech leader, but this also requires a good quality of life for all of our residents across all economic and demographic profiles. The chance to take my experience not only as a business owner, but having worked in policy/budget issues at the state and federal level and on government efficiency issues would be a chance to serve my community and provide advice and input on how keep our government efficient, while funding critical programs and initiatives and providing and improving equity of services and funding of those services.

**What is there specifically in your background, training, education or interests that qualifies you for appointment? What special qualities and/or qualifications can you bring to the body(ies) to which you seek appointment(s)?**

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I believe my background as a business owner who has also worked on budget and policy issues for state and federal governments and served as Vice Chair of the Los Angeles Innovation Commission (it was called the Los Angeles City Quality and Productivity Commission) gives me a unique set of perspectives that would be an asset to the city. My work with the City of Los Angeles Commission included working with my friend (and now LA City Controller Ron Galperin) on issues ranging from asset tracking and IT access as well as an annual quality and productivity award program to highlight efforts to improve government efficiency. My first job in government was helping the state of Maryland draft and create an innovation award program, followed by working for the Maryland State Highway Agency on government efficiency issues. As Ted Lieu's legislative director, I staffed his work on the House Budget Committee.

**How do you envision your fulfilling the objectives, and/or goals of the body(ies), as established by the City Council?**

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I have always approached my objectives from a viewpoint of being prepared and building consensus. I will continue to work closely with the Council and my fellow commissioners in that manner.

**How many meetings of the commission(s), board(s), or committee(s), to which you are interested in being appointed have you attended? Please indicate how often and when.**

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I have only recently returned to Culver City in October. I have reached out to the commission members and councilmembers I know to get a better understanding of how the commission is approaching both the business license tax issue and the broader agenda of the commission.

**How much time, on a monthly basis, can you commit to reviewing materials in preparation for attendance at meetings of the body(ies) to which you desire appointment?**

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I own my own business across the street from City Hall and I have time and flexibility to work on these matters for a commission, but I want to stay focused on one commission plus my community building efforts.

**Is there anything else you would like to add that has not been covered by your answers to the prior questions? (You may attach supplemental information below.)**

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Please upload a file to attach supplemental information, if desired.

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### Outreach Question

**The City Clerk's Office is always looking to improve outreach. Please indicate how you heard about this opportunity.**

- 
- ☒ Website/Email
  - ☒ Word of Mouth

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### Supplemental Questions

Question applies to Finance Advisory Committee

**Please ensure you meet the qualifications below for the membership category(ies) for which you are applying. Please select the Category for which you are applying to the Finance Advisory Committee:**

- 
- ☒ Resident
  - ☒ Local Business Representative

Question applies to Finance Advisory Committee

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**Which Boards would you like to apply for?**

Finance Advisory Committee: Submitted

**If you are applying for more than one body, please list those bodies in the order of preference for which you would like to be considered below.**

Randall (Randy)

First Name

Lentz

Last Name

**Are you a Culver City resident?**

☐ Yes ☒ No

**If you are a resident of Culver City, please list how many years:**

**Are you a Culver City business owner/operator?**

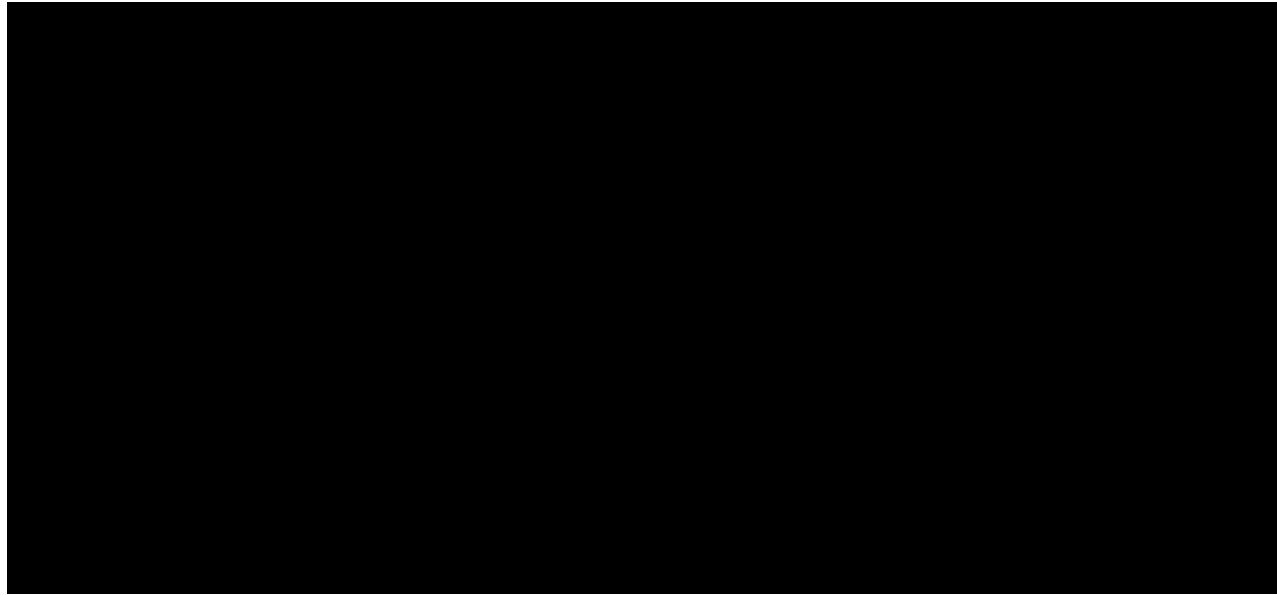
☒ Yes ☐ No

If you are a Culver City business owner/operator, please list how many years.

2 years

Are you registered to vote in Culver City? (Certain bodies currently require its members to be registered voters.)

☐ Yes ☒ No



### Qualifications and Experience

Have you ever worked for the City of Culver City?

☐ Yes ☒ No

If you have worked for the City of Culver City, please list dates of employment and names of departments.

If you are related to any current City employees or appointed officials of the City of Culver City, please indicate name(s) and relationship(s).

Have there been, or are there now, any circumstances and/or relationships which might reflect adversely on the propriety of your serving as a member of any body to which you might be appointed?

☐ Yes ☒ No

If yes, please explain:

**Community Service (List commissions, boards, committees and other organizations on which you have served or currently serve, are a member or have been a member and offices held and in what city those positions were or are held). Please feel free to include participation in community events. Please highlight Culver City community involvement:**

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I have been an active member of the communities in which I live throughout my life. Over the years, I have participated in and/or held leadership positions in a plethora of school, community and church related boards, committees and other groups based on my interest and abilities and on the need. I currently sit on the Board of the Adelanto Cannabis Association and I am a co-lead of the Adelanto ad-hoc committee for cannabis regulation and oversight. When my children were younger I held more "coach" and "assistant coach" positions that I can count, and I often supported by committee membership or board leadership various teams, leagues and events. One area I have consistently focused on in my professional career is Diversity and Inclusion, a focus area that I have championed in multiple ways including creation of programs and committees to generate awareness and fairness in the workplace. Generally speaking, I am the type of person who answers the call when I am able, and I always focus on the goals and the needs of the organization as opposed to any personal agendas.

**Employment. Please provide a minimum of 5 years of employment history, including titles and duties of current and past employment. Please feel free to attach a resume or CV in lieu of completing this section:**

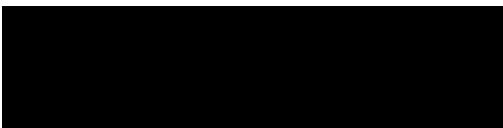
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Please see attached resume.

**Education (Include professional or vocational licenses and certificates.) Please feel free to attach a resume or CV in lieu of completing this section:**

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Please see attached resume



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## **Application Questions**

**For the body(ies) to which you seek appointment(s), what have you determined to be the primary role of the body?**

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I understand that the Finance Advisory Committee is charged with the responsibility to "provide advice to the City Council based on the specific tasks or duties approved by the City Council." At a high level, my expectation is that this primarily involves (1) reviewing proposed expenditures for the City, (2) looking at ways to generate additional revenues, and (3) looking for ways to be more efficient with existing programs and expenses. As a business community member (Howling Juice), I would also look to represent the perspectives and needs of the business community on the FAC.

**Why do you seek appointment on the body(ies)? Please be specific to the body(ies)'s role.**

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I am a proud member of the Culver City business community. During the initial launch of my business, Howling Juice, I was consistently impressed by the responsiveness and diligence of the City and the people at City Hall. It made me feel good about launching Howling Juice in Culver City. I have a very substantial business background and significant experience dealing with budgets and financial matters. I also understand that civic and public matters do not always proceed in a purely business or "corporate" manner. I believe it takes someone with a balanced understanding of both worlds to be a strong advisor to the City. I fit that profile and I am willing to serve. I will always think outside of the box and challenge convention, but still recognize that consensus and process are both very important, and the the long game can be as important or more important than any quick win.

**What is there specifically in your background, training, education or interests that qualifies you for appointment? What special qualities and/or qualifications can you bring to the body(ies) to which you seek appointment(s)?**

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Please see my resume. I have worked at a very high level in business ranging from service as the General Counsel for multiple Health Plans (at UnitedHealthcare), to running large consulting portfolios (\$300M+ annually), to negotiating and closing mega-deals (in excess of \$1.5 billion), to running organizations with more than 7,000 employees. I have had CFOs and Chief Compliance Officers reports to me, and I have built those departments from the ground up.

**How do you envision your fulfilling the objectives, and/or goals of the body(ies), as established by the City Council?**

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I will zealously address any and all matters the FAC is charged with supporting. In simple terms, I will attend every meeting, inform myself and research relevant issues, confer with colleagues, and develop solutions and recommendations for the City. I will also look at the FAC process and operating approaches and make recommendations for improvements.

**How many meetings of the commission(s), board(s), or committee(s), to which you are interested in being appointed have you attended? Please indicate how often and when.**

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I have not attended meetings of the FAC in the past. I plan to attend the scheduled meeting on 11/14, which is the first scheduled meeting I could attend after receiving the invitation to apply for consideration as an FAC member.

**How much time, on a monthly basis, can you commit to reviewing materials in preparation for attendance at meetings of the body(ies) to which you desire appointment?**

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I will do what it takes. I find assigning an arbitrary number of hours to be more of a guess than a commitment. I am used to burning the midnight oil and doing what it takes to get the job done. You can count on me to be in attendance and to be informed and prepared.

**Is there anything else you would like to add that has not been covered by your answers to the prior questions? (You may attach supplemental information below.)**

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I thank you for your consideration, and I would be honored to be selected to serve on the FAC.

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Please upload a file to attach supplemental information, if desired.



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**The City Clerk's Office is always looking to improve outreach. Please indicate how you heard about this opportunity.**

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None Selected

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### Supplemental Questions

Question applies to Finance Advisory Committee

**Please ensure you meet the qualifications below for the membership category(ies) for which you are applying. Please select the Category for which you are applying to the Finance Advisory Committee:**

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None Selected

Question applies to Finance Advisory Committee

From the City Council approved "Finance Advisory Committee Bylaws:

"Business Community Member: Shall own or be the primary operator of a duly licensed business located within the City limits.

Please call the Finance Department at (310) 253-5865 if you have any questions regarding eligibility for Finance Advisory Committee positions.

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### Thank You

The City Clerk's Office encourages all interested persons to apply for all positions in which they have an interest!

## AREAS OF EXPERTISE

- Portfolio Leadership, P&L
- Operations Leadership
- Sales & Market Development
- Business Transformation
- Healthcare
- Provider, Payer, Public Markets
- Management Consulting
- Small, Mid-Cap & Fortune 100
- Chief Operating Officer
- Corporate General Counsel
- Private Equity Experience
- M&A

## PROFESSIONAL EXPERIENCE

### CALIFORNIA BIOTECHNOLOGY CENTER

**2016-PRESENT**

[Privately held] California company based in Adelanto, California engaged in vertically integrated business operations in the medical marijuana industry.

#### FOUNDER, CHIEF “GROWTH” OFFICER 2015 -

- Responsible for strategic direction, corporate development and executive management over all business operations.

### COGNIZANT

**2013-2016**

[NYSE/CTSH] NASDAQ-100, S&P 500, & Forbes Global 2000 global technology, business process and innovation company. Enables global enterprises to achieve market-leading efficiency and powerful innovation. 217,000 employees. 50+ global delivery centers. FY'14 Revenues \$10.3B.

#### CHIEF OPERATING OFFICER, HEALTHCARE BPaaS SERVICES, 2015-2016

- Named Chief Operating Officer for new Cognizant business unit delivering comprehensive, enterprise level, business services including IT, operations, infrastructure, and numerous business functions for clients. Revenues: \$2.7B, multi-year program. Employees: 7,000.
- Directly managed HR, Finance, Compliance, Procurement, Communications, Administrative Operations and cross-tower functions including innovation, strategic planning and program launch & transformation.
- Reported to Global business head for HC BPaaS Services

#### DUAL ROLE; PORTFOLIO OWNER - UNITEDHEALTH GROUP, TRANSFORMATION EXECUTIVE - HEALTHCARE

- P&L owner for UHG business portfolio, Healthcare. Responsible for all aspects of portfolio performance, delivery, growth and executive relationship. Revenues: \$200M. Employees: 2,500.
- Executive sponsor and hands-on coach/champion for innovative transformation program sponsored by Cognizant CEO. Responsible to work with all strategic account teams across Healthcare vertical, to coach and drive transformation and expansion of client relationships and increased strategic impact. HC Revenues: \$1.5B
- Reported to Global business head for HC Services

### ACCENTURE

**2011-2013**

[NYSE/ACN] A Fortune 100 global management consulting, technology services, outsourcing and systems integration company. Helps clients become high-performers. 257,000 employees. 54 countries. FY'12 Revenues \$27.9B.

#### MANAGING DIRECTOR/PARTNER, HEALTH SOLUTIONS NORTH AMERICA

- Led and managed the North America Clinical Solutions-Provider, Payer & Public Markets business pipeline for consulting and outsourcing services. Revenues: \$250M. Employees: 1,000.
- Target market: Top 150 hospitals, approx \$1B+ in revenues. Indirect P&L.
- Drove Clinical Solutions EMR (Electronic Medical Records) Campaign and market development initiatives.

- Developed and managed Clinical Solutions (includes; System Implementation, Business/Health Transformation, Analytics, HIE – Health Information Exchange) sales pipeline >\$350M.
- Achieved annual targets: \$140M-Sales and \$130M-Revenues. Activities included:
  - top-down pipeline management.
  - developed and coached business originators and business development capture teams.
  - marketing campaigns for new and existing services.
  - direct customer involvement in key sales pursuits.
- Co-led multi-year Clinical Solutions Campaign involving development of EMR Consulting Solutions, offshore Centers of Excellence, and infusion of EMR/Clinical sales priorities and capabilities across Accenture's extended sales operations.
- Achieved 90% sales growth and 50% revenue growth, year over year.
- Reported to North America & Global Clinical Solutions Managing Directors.

**Ingenix Consulting/OptumInsight** (rebranded as OptumInsight in 2011.)  
Minneapolis, MN

**2004-2011**

Ingenix is now OptumInsight, part of Optum— a leading health services business. OptumInsight specializes in improving the health system performance by providing analytics, technology and consulting services to enable better decisions and results. FY 2011 Revenues \$25B.

**VP, SOLUTION SALES LEADER - HOSPITAL MARKET, 2009-2011**

- Promoted to National Sales Lead for all Ingenix Consulting services for the Hospital Market. Revenues: \$100M in 2011.
- Developed and managed four (4) Regional Sales Executives covering the US.
- Expanded sales capabilities for new and emerging service lines; including developing targeted campaigns for process optimization and healthcare analytics consulting.
- Maintained mature services lines including Epic implementation and strategic consulting services.
- Co-led integration and redevelopment of two (2) disparate sales teams from acquired consulting organizations (Healthia Consulting and Global Works Systems).
- Recognized for key successes in the integration of acquired operations while continuing to generate \$6-\$10M sales wins for consulting services.
- Primary executive relationship owner with key IT services integration partners, including Epic Systems, Inc. and numerous staffing partners.
- Recipient of *Ingenix Customer Focus Award* - recognized for outstanding performance in sales, account management and leadership.

**VP & ACCOUNT EXECUTIVE, INGENIX/HEALTHIA CONSULTING, 2006 – 2009**

(Healthia Consulting was acquired by Ingenix Consulting, September, 2007)

- Promoted to Regional Sales VP. Assumed ownership for US Central Region which included Healthia's corporate home office and premiere markets; hospital systems and large provider organizations.
- Consulting "partner" role. Primary customer-facing sales executive responsible for all sales and account management across strategy, management consulting and IT implementation.
- Participated in leadership and management of all key business operations including Sales, Marketing, Recruiting, Account Management and Delivery/Quality oversight for all consulting business.
- Direct line management responsibility for all Central Region professionals; including 40+ Directors, Managers and Consultants.
- P&L: Annually sold, closed and managed \$9 - 13M in consulting business representing 60-85% of the divisional book of business.
- M&A: Co-led operations redesign and related change management efforts surrounding Healthia acquisition by Ingenix.
- Reported directly to CEO and COO.

**MANAGEMENT CONSULTANT & PRACTICE DIRECTOR** (Healthia Consulting), 2004-2006

- Combined role of full-time management consulting in addition to practice development and organizational leadership for Healthia Consulting. 2006 Revenues: \$16M. 30-35% growth annually.
- Developed and expanded Payer Consulting Practice focused on client advisement across business strategy, technology, change management and project support.
- While working full time as a billable management consultant, personally built and led a \$4M Healthcare Payer Consulting Practice.
- Operations leadership and program management for “Centers of Excellence” IT function. Included designation database development and application support for UHN/UHC Premium Designation Program.
- Built Healthcare Critical Analytics Function / Dept for UHC which governed the development, implementation & operations of analytics data, platforms, applications and tools across the organization.
- Worked directly with UnitedHealthcare CEO, COO and IT leadership.
- Project management and IT support for UHC’s Customer Reporting and Customer Coordination Departments.

**UNITED HEALTHCARE**  
Minnetonka, MN

**1998-2004**

[NYSE:UNH] An operating division of UnitedHealth Group, the largest single US health carrier. FY’04 Revenues \$40.3M

**VP, VENDOR PROCUREMENT & PERFORMANCE MANAGEMENT, 2003-2004**

- Managed \$80M annual expenditure for strategic internal and external partners and suppliers on behalf of UHC Clinical Operations and UnitedHealth Networks, (UHN is a subsidiary of UHC).
- Procurement and management of critical supplier and customer relationships involving data and technology solutions, clinical care management services, disease & condition management programs, general consulting and program-specific vendor activity.
- Led design and development of Data Mart technology to assess physician performance on quality and efficiency criteria to support Premium Network, Physician Data Sharing and Clinical Profiles initiatives.
- Delivered strong, integrated programs and solutions while ensuring accuracy and consistency of performance by utilizing the principles of process excellence, Six Sigma and standard tools.
- Operations leadership - helped define requirements and priorities, created IT interfaces with internal organizations to define and procure services, developed and sustained operations support structure, and measured performance to ensure alignment with strategy and goals.

**ACCOUNT EXECUTIVE, NETWORK MANAGEMENT, 2002-2003**

- Developed and served in new role of Account Executive-UnitedHealth Networks to own corporate relationships and manage strategic business initiatives for \$220M in network services.
- Primary inter-company liaison between UHN and UHG sister companies of Uniprise (national accounts), Ovations (Medicare, Evercare and AARP business lines) and AmeriChoice (Medicaid).
- Indirect P&L: Primary account executive over all UHN services to sister companies.
- Led planning process for provider network enhancement across all markets nationwide and created metrics driven tracking environment. (Precursor to UnitedHealth Premium program that helps patients find doctors and facilities based on quality and cost efficiency of care.)
- Designed and implemented online reporting and tracking tools to manage 150+ network development objectives covering 200+ hospitals and 10,000 physicians.
- Supported UHC Marketing Services and external sales needs regarding network operations.

**VP – PRODUCT MANAGEMENT, 1999-2002**

- National business owner for \$120M customer base of UHC’s “out-of-area” health insurance.
- Led and managed operations, systems performance and comprehensive product support.
- Led process redesign and full implementation of enhanced business capability to support national PPO product and eliminated substantial service problems. Improved accuracy and timing of claims processing by 85%.

- Led development of next generation Certificate of Coverage for medical insurance products – achieved significant gains in usability and consumerism focus. Established business opportunity for annual savings of \$100M in benefit cost.
- Led broad-scale process improvement to develop and implement new operations model for product setup, including business processes for management of product standards and online systems to drive case review and communicate product information. Eliminated 450+ product variations and reduced set-up errors 60%.

#### ASSOCIATE GENERAL COUNSEL, 1998-1999

- Managed and provided all legal support for UnitedHealthcare, IL and UnitedHealthcare, WI Health Plans.
- Led and managed regulatory and compliance activities. Provided strategy and analytical support for health plan business initiatives.
- Extensive involvement in provider, broker and group contract development, negotiation and administration.
- Program liaison and oversight for UHC compliance, communications and technology initiatives.

#### RIDER, BENNETT, EGAN & ARUNDEL, LLP

1989-1998

Minneapolis-based full-service law firm.

#### PARTNER, COMPLEX LITIGATION

- Extensive corporate representation ranging from emerging businesses and start-up ventures to Fortune 500 companies.
- Devised successful litigation strategies for major claims involving contingent liabilities ranging from \$30M to \$500M.
- Resolved litigation and claim barriers affecting corporate mergers and sales of business units.
- Responsible for strategic planning, budgeting and decision making regarding computer network, space planning, technology issues and recruiting.

#### EDUCATION & PROFESSIONAL DEVELOPMENT

**William Mitchell College of Law**, St. Paul, MN

Juris Doctor, 1989 *Cum Laude* Honors

**University of Minnesota**, Minneapolis, MN

BA – Economics, 1986

#### AWARDS, SPEAKING ENGAGEMENTS, MISC.

- Cognizant *TCR Champion* – Business, Relationship and Performance Coaching
- Ingenix *Customer Focus Award* – Recognizing innovation and excellence in customer service.
- ABA National Trial Competition – Finalist.
- HIMSS & CHIME Professional Associations: Frequent Speaker & Facilitator at national events.
- HIMSS – Member MN and Board Member.
- Healthia Consulting, Founders' Award – Performance recognition.