

Alex Bean

PROFESSIONAL HISTORY

Program Administrator - Law, Letters, and Society

The University of Chicago, Chicago, IL; May 2022-present

- Managed the operations, development, and communications of an undergraduate program concerned with law and legal systems
- Oversaw financial administration, coordinated course schedules and catalog, and planned annual deadlines and events calendars
- Tracked student progress, managed course promotions, and facilitated organization of both the Faculty and Student Boards
- Acted as program liaison to other departments, offices, and programs in the University, both to manage day-to-day functions and develop the program's partnerships and development

Social Sciences Collegiate Division Coordinator

The University of Chicago, Chicago, IL; August 2021-May 2022

- Supported operation and planning for the Social Sciences Core sequences, including communications, scheduling, and acting as inter-departmental liaison
- Provided teaching support for SSCD-affiliated courses and instructors, including processing academic appointments and organizing desk copies
- Helped with large and small-scale projects, from calendar management to data collection, communications, and grant dispersal

VP of Membership Outreach

City Colleges of Chicago Contingent Labor Organizing Committee, Chicago, IL; July 2020-July 2021

- Managed social media and web presence for adjuncts' union
- Oversaw media contacts, public statements, and press releases
- Coordinated phone banking, texting, and other membership communications

Adjunct Faculty

Harold Washington College, Chicago, IL; August 2010 - July 2021

- Taught classes of 25-30 students per course, 4 courses per semester, in the Humanities Department
- Created course curriculum, including class structure, goals, lesson plans, and projects
- Transitioned to distance learning for all courses during COVID-19 pandemic



EDUCATION

A.M., The University of Chicago, 2010

B.A., Bowling Green State University, 2009

REFERENCES

Gretchen Holmes Lyons
Administrator - Social Sciences Collegiate Division
The University of Chicago



Howard Nusbaum
Master - Social Sciences Collegiate Division
The University of Chicago



Rachel Tollett
Uniserv Director - Service Area H-E
Illinois Education Association



Marie Rowley
Marketing and Communications Manager
Chicago Cultural Alliance



Ashley N. Williams

Over ten years of experience assisting in various office situations including but not limited to training, compiling, and analyzing data for multiple departments as well as members of the upper management staff and creating and presenting reports and presentations. I am very proficient in MS Word, MS Excel, MS Outlook, and MS PowerPoint. I am also proficient in DropBox, Google Docs, Illustrator, Photo Shop, Aderant, ARCS, and other Client Management Software.

Demonstrated success record in:

- Analyzing various types of reports and data
- Managing a project that consisted of gathering and interpreting data from other departments
- Research and Research Analysis
- Training new and existing employees during the implementation of new company policies
- Assisting in the streamlining process of reporting between the company and clients
- Typing and understanding various legal documents
- Handling various phone calls from clients and consumers
- Experienced with managing daily schedules
- Motivating staff to peak performance levels by assuring that company deadlines were met
- Creating and implementing training manuals
- Comprehending, analyzing, and monitoring phone calls
- Knowledge of FDCPA and HIPAA
- Managing reporting projects for upper management

Education

Indiana Wesleyan University

- Masters in Public Administration 2017-2019

University of Missouri-Columbia

- Bachelor of Arts in English with a minor in History 2005-2010

How to Communicate with Tact and Professionalism

- Certification 2012

PROFESSIONAL EXPERIENCE

Cerity Partners

2021-Present

Accounts Receivable Manager

Primarily responsible for monitoring the receivables of the advisors by using various reporting data and analytical software.

- Ensure timely collection of payments
- Manage and mentor Accounts Receivable Analyst
- Answer questions regarding complex cash application items and lead research efforts to resolve and ensure cash is applied to the proper invoice
- Set objectives for the accounts receivable team that align with the accounting department's goals
- Communicate with our offices across the country to advise of past due receivables, answer questions and assist as needed
- Complete accounts receivable balance sheet reconciliation monthly
- Prepare additional monthly, quarterly, annual, and ad-hoc reports as needed

Hinshaw and Culbertson

2015-2021

Client Account Analyst

Primarily responsible for monitoring the relationship between the law firm and the clients by using various reporting data and analytical software.

- Compile data and statistics based on the financial history between the law firm and the client
- Training new employees on best practices and utilizing the Client Management System
- Prepare daily and weekly reports for the upper management staff detailing daily receivables as well as outstanding invoices
- Planning and scheduling meetings
- Preparing and submitting various correspondence to clients daily
- Assisting in the streamlining process between the firm and a major client regarding the reporting of their outstanding accounts receivables
- Monitor invoice status (e-billing and/or regular accounts receivable) for clients and document accounts receivable and unbilled inventory status in system; follow-up in efforts to ensure timely collection of invoices
- Meet with attorneys on an ongoing basis to determine status regarding aged unbilled time and collection of their receivables
- Work queue of assigned accounts by email, telephone and by correspondence, when necessary, documenting collection efforts
- Follow up with clients regarding missed payment plan payments
- Prepare and distribute reminder statements monthly
- Reconcile, research client accounts, payments, unapplied cash, etc. upon request
- Identify and help resolve problematic patterns and situations that may adversely impact billing and collections
- Prepare accounts receivable write off requests and obtain necessary approvals
- Respond to routine requests for documents or information by attorneys or clients
- Generate reports for aged accounts receivable and unbilled time, open invoices, credits, payment history and any other reports, as requested
- Occasionally conduct skip tracing and asset searches
- Perform any other duties and responsibilities as requested

Walgreens Infusions and Respiratory Services

2013-2015

Collections Specialist

Monitored and maintained patient accounts to ensure that the patient balances were satisfied in a timely manner.

- Reviewed accounts assigned for a particular infusion and respiratory location
- Established payment plans for outstanding balances
- Provided information regarding the services provided for the outstanding balances
- Interpreted various insurance explanation of benefits (EOB) forms
- Made and received phone calls to answer questions regarding patient billing
- Processed card and check payments via phone
- Ensured prompt and timely payment of submitted invoices
- Followed up on invoices submitted to ensure prompt and timely payment and escalates issues as necessary
- Evaluated payments/denials received for correctness and ensures that they are applied appropriately
- Identified bad debt write-offs and A/R adjustments
- Initiated write-off and adjustments in accordance with policies and procedures
- Ensured that secondary bills and patient invoices are accurately generated and submitted on a timely basis
- Identified any overpayments and/or duplicate payments, and investigates and resolves
- Processed refund requests, in accordance with policies and procedures
- Adhered to Regulatory / Payor Guidelines and policies & procedures
- Knowledge of HIPAA and FDCPA

Harris and Harris

2011-2013

Quality Assurance Analyst-Team Lead

- Assisted with the drafting of a policy and procedure manual
- Lead a team of four to insure they scored at least 40 calls per day

- Monitored recorded calls to insure quality
- Analyzed various recorded conversations
- Edited Excel formulas to insure proper scoring of recordings
- Presented ideas on how to improve call quality
- Created reports to discuss errors made on recordings
- Trained new employees on how to properly score recordings
- Managed daily schedules
- Motivated the team to recover more revenue
- Managed daily totals
- Organized various documents
- Edited documents to insure the information is correct

Faber and Brand Law Firm

2006 – 2010

Senior Legal Account Representative

- Handled various legal documents
- Placed and received phone calls from clients and consumers
- Created various learning techniques for new employees
- Managed and organized call lists in order to encourage consumers with past due accounts to repay the debts that they owe
- Knowledge of HIPAA laws and violations
- Knowledge of FDCA

Organization

Order of the Eastern Star

2013-Present

- Planned community engagement activities including by not limited to Community Health Fairs, Community Back to School Fairs, Toy Drives, and Fundraisers for Domestic Violence Awareness

BRIAN C COMER

PROFESSIONAL SUMMARY

Experienced, high energy integrated communications and business executive with a background in renewable energy markets, fundraising, advertising, and media – well versed in public relations, marketing strategy, broadcast media, and branding initiatives. Proven effectiveness in managing cross-functional teams in results-oriented environment, combining outstanding public presentation and interpersonal skills with strong conviction in team collaboration and personal excellence to create impact and deliver exceptional products and services. Well suited for fast paced, dynamic organizations.

CIVIC INVOLVEMENT SUMMARY

Impassioned advocate for causes that provide for community, equality, the environment, and safety. Serving as president of a 5,000 mailable address community in Chicago provides the perfect opportunity to promote community building, community safety, beautification/green space, small business, intelligent development, and reasonable architectural preservation. Additionally, leading an organization that actively encourages "inclusion through volunteerism" for adults with disabilities allows for open conversation with the Chicago community regarding the value of every person.

PROFESSIONAL EXPERIENCE

BRIAN COMER CONSULTING, Chicago, IL

2014 - Present

Consulting enterprise focused on smaller organizations requiring national/global reach

Lead Consultant/Principal

- Created a competitive new software product line for Affordable Care Act reporting client during the industry's infancy. The product line now represents a 38% increase in annual revenue for client.
 - Real-time research of federal tax mandates required by the new law as it pertains to the scope of product development which changed regularly as law/industry came online.
 - Constructed prototypes, overseeing all testing of data modules to confirm accuracy of model.
 - Increased marketability of product through hosting user-centric design research conducted from client's existing customer base and prospects.
 - Worked hand-in-hand as lead interface with software development teams troubleshooting back-end issues.
 - Designed interactive educational programs for customers to learn how to use the new products.
 - Led sales function and managed sales force.
 - Co-developed brand marketing program (digital & print) with client for use by sales team and at trade shows
 - Oversaw continual design improvement, decreasing client's cost to manage of product from year to year.
- Startup Consultant for client entering the renewable energy industry. The client is now an active member of the growing renewable community with renewable assets across North America.
 - Designed business plan for entry into a new industry for the client.
 - Connected client to domestic and international renewable developers, independent power producers, utility industry, and investors.
 - Guided strategy for asset acquisition and development of owned assets to leading to a third year 75% increase on initial financial investment.
 - Directed talent acquisition of knowledgeable professionals to lead client forward.
- Development consultant providing fundraising and business development services

ACCIONA ENERGY NORTH AMERICA CORPORATION, Chicago, IL

2008 – 2012

A Global Leader in Sustainable Energy

Business Development Manager – East Coast Region

- Evaluate and identify greenfield and acquisition opportunities to best fit company's risk portfolio.

Brian C. Comer, page 2

- Swiftly negotiated and acquired over 6,000 acres of land involving over 70 landowners in less than a five-month period for two projects sites within the Eastern seaboard marketplace.
- Engage and educate local officials and ‘influencers’ to build early community support of targeted project sites leading to swift land control process.
- Prepare comprehensive Renewable Portfolio Standard review for multiple states, projecting future load growth and identifying risks to pinpoint new investment opportunities for wind and solar projects.
- Investigate and present detailed analyses of state regulation boards to management to create consensus to move forward with targeted project areas.
- Managing all development activities and cross-functional resources, including project budgeting, environmental and wildlife review, transmission analysis, and consultant relationships.
- Manage analyses and document flow for several utility-scale asset divestures representing over \$10 million in recognized revenue.
- Assisted in the evaluation of solar, water, salt and several other renewable opportunities within the energy marketplace.

IMPACT 360, Chicago, IL

2004 – 2008

Founded and operated integrated communications firm specializing in marketing, advertising and public relations targeting local Chicago companies.

- Responsible for developing new business to drive recognized revenue to IMPACT 360.
- Designed integrated marketing strategies utilizing radio, television, web, and print mediums broadening client brand exposure.
- Applied structured thinking and analytical insight to help clients grow revenues by 30%.
- Initiated training programs for clients’ sales teams delivering 40% growth in billings.
- Provided clients with detailed market research determining their existing market share, need for brand repositioning and identifying growth target markets.
- Implemented internal profit modeling and cost analysis strategies measuring our clients’ marketing campaigns.

DEPAUL UNIVERSITY, Chicago, IL

1999 – 2004

Nation's largest Catholic university with over 23,000 students.

Assistant Director of Development, Office of Development (2000 to 2004)

- Re-designed and implemented proactive grass roots marketing and solicitation plan for internal campaign resulting in increased donor participation of 300% and campaign dollars of 400%.
- Tailored marketing and communications strategies to best market the President’s Club – achieving 20% increases in both annual giving and membership.
- Developed and executed formal training programs to assist volunteers in strengthening their fundraising skills – resulting in increased volunteer solicitations and donor response rates by 15%.
- Researched, targeted and sold faculty services and facilities to mid-sized and multinational corporations generating nearly \$200,000 in annual revenue; while managing marketing and promotional budget of \$10,000.
- Guided marketing and advertising strategies, both print and online, for graduate program of DePaul’s Kellstadt Graduate School of Business producing 15% increase in applicants to the program.

EDUCATION

Bachelor of Science in Marketing • DePaul University, Chicago, IL

PROFESSIONAL & CIVIC ACTIVITIES

| | |
|---|---|
| Sheffield Neighborhood Association | President, 2020 – Present; Director 2017-2020 |
| Trinity Volunteer Corps | President 2020 |
| Chicago Police Department CAPS | Beat Facilitator, 2022 |
| Chicago 2016 Next Generation Leadership Advisory Council | Member, Board of Directors, 2008 – 2009 |
| World’s Largest Block Party/Shamrock’n at Old St. Pat’s | Chair, 2004 – Present |
| Chicago Gateway Green, Green Tie Ball | Chair, Corporate Underwriting, 2007 – 2008 |
| Young Irish Fellowship Club of Chicago | Vice President, Board of Directors, 2004 – 2008 |

DARREN TAYLOR

EDUCATION

M.A. Public Safety Administration December 2009
Lewis University, Romeoville, IL
B.A. Fire Service Administration September 2006
Eastern Oregon University, La Grande, OR
Chicago Fire Academy, August 2006
California State Fire Academy, May 1999
American River College, Sacramento, CA
EMT for Field Paramedic License, November 1996
Southwestern College, Chula Vista, CA

EXPERIENCE

FIREFIGHTER/PARAMEDIC

Chicago Fire Department, Chicago, IL 2006--

Klamath County Fire District, Klamath Falls, OR 7/2001-8/2006

With Chicago I was one of the radio instructors. Also dive certified. I help with the CPFTA program. I support Ignite the Spirit as a past boxer, presently on football team and in the calendar. My benefit is that I have experience in both rural and urban arenas. They both share unique opportunities and challenges that I have met and in cases, exceeded.

CERTIFICATIONS

**Firefighter III * HazMat (TechB) * Confined Space Tech *
Collapse Tech* SCUBA OW-1* Fire Prevention * FSVO*
Trench Tech* Rope Rescue Tech* VMO Tech* Fire Instructor II*
Fire Investigation/Command* Several Wild land classes* Many
NFPA/ICS Fire Officer Classes* Incident Safety Officer* P.C. 832**

PARAMEDIC

ATI, Chicago, IL 5/07—5/09

St. Elizabeth Hospital, Red Bluff, CA 9/1999-11/2001

American Ambulance/AMR, Fresno, CA 10/1997-11/1998

Fast paced single role Paramedic in urban/rural areas, sole 911 providers. ACLS/CPR Instructor. High volume system status. Bicycle Paramedic Team. Provide excellent patient care, scene management. Hospital based ambulance, assist in ER, disaster drill coordinator, prepare CQI reports, community driven and minded.

RESERVE/VOLUNTEER FIREFIGHTER

Tehama County Fire/CDF, Red Bluff, CA 8/2000-4/2002

East County Fire Protection District, El Cajon, CA 5/1995-10/1997

EMT & INSTRUCTOR

Oakton College, Skokie, IL, 2018

Triton College, Chicago, IL 2007

Klamath Community College, Klamath Falls, OR 1/2002-6/2005

AHA & Schaefer Ambulance, San Diego, CA 1994-1997

Jacob Ringer



Professional Experience

Sushi Hall

Chicago, IL

Partner

2021- present

- Recruited and led a team of professionals from concept to successful opening featuring an acclaimed local sushi chef
- Featured in the Chicago Tribune, Block Club Chicago, and named on Eater Chicago's "July Hot List"
- Responsible for all operational needs including capital raise, vendor relationships, and contract selection
- Oversight of all day-to-day financial and staffing operations, including strategic decision-making
- Licensed general contractor on site every day overseeing construction

The Institute for Political Innovation

Chicago, IL

Deputy Director

2020-2021

- Advocated for the advancement of Final Five Voting (FFV), a theory created by Katherine M. Gehl and Harvard Business School Professor, Michael E. Porter
- Recruited, developed, and managed business and civic non-partisan and cross-partisan leaders in FFV efforts in over fifteen states

Metro Commercial Real Estate

Chicago, IL

Senior Associate

2019-2020

- Found and evaluated strategic development opportunities for clients, including financial modeling
- Licensed Real Estate Broker

Ringer for Results

Chicago, IL

Candidate for 43rd Ward Alderman

2018-2019

- Led a grassroots campaign through direct personal connections, including over 10,000 door knocks
- Managed all organization activities to meet budget and other financial goals
- Participated in eight public debates, multiple endorsement sessions, and TV/ radio appearances
- Leveraged data to create a comprehensive outreach strategy including social, IP, and direct mail
- Called "an active force in the community" by Block Club Chicago

mHUB

Chicago, IL

Community Development Manager

2017-2018

- Drove membership, growing from 150 members to over 500
- Managed the membership team, which was responsible for all member activities and recruitment

RK, Ltd.

Chicago, IL

Senior Director

2014-2017

- Advised clients on a wide range of political, financial, and strategic issues
- Prepared and managed budgets on multiple special projects, including forecasting

City of Chicago

Chicago, IL

Chief of Staff to the Chief Financial Officer

2012-2014

Financial Policy Associate for the Chief Financial Officer

2011-2012

- Drove high impact projects for the CFO of Chicago in finance, pension, public-private partnerships, municipal marketing, municipal bonds, and public policy
- Helped deliver \$280 million in new revenues to the City in an innovative municipal marketing transaction
- Assisted launching and organizing an annual Investor Conference, a first-of-its-kind investor outreach event for Chicago and its sister agencies that has been replicated by cities and states nationwide
- Advised CFO on wide range of financial and strategic issues

Other Relevant Experience

Lincoln Central Association

Director

Lincoln Park

2022- present

Member

2015 - present

Bauler Park Advisory Council

Vice President

Lincoln Park

2020- present

Old Town Triangle Association

Old Town Art Fair Parking Chair

Old Town

2021- present

By-law committee

2020 - 2021

Member

2017 - present

St. Michael's Tee-Ball

Commissioner

Old Town

2019- present

Lincoln Park Zoo

Auxiliary Board – Sustaining member - Former: President, Nom & Gov, VP, Spooky Zoo

Lincoln Park

2012 – present

Board of Trustees- Ex-Officio

2016 – 2018

Center for Economic Progress (merged with Ladder Up)

Board of Directors - Former: Nominating Chair, External Affairs

City Wide

2014 –2018

The Night Ministry

Member-at-large - Former: Associate Board Member

City Wide

2012 –2018

Education

Tulane University

New Orleans, LA

Master of Finance, A.B. Freeman School of Business

2009

Bachelor of Science in Management, A.B. Freeman School of Business

2008

Competencies and Certifications

- Licensed Real Estate Agent, Illinois
- Licensed General Contractor, City of Chicago
- State of Illinois Liquor License Holder
- Advanced with: Microsoft Suite, NGP/VAN, Vote Builder, Toast, Tock
- Fluent with: Salesforce, WordPress, Prezi, ARCGis, CoStar, Lexis Nexis, C++

JAMES F. KROEGER



SUMMARY

Visionary and successful small business owner with 30+ years work experience in the Lincoln Park community. Active public servant with valuable 16-year corporate experience as a former pension actuary. Highly principled business leader and a firm believer in collaboration, cooperation and teamwork, but not afraid to speak up to protect the rights of constituents that are victims of discrimination and oppression.

- Lincoln Park Presbyterian Church, Attendee since 2018, and Member 2020 to present
- Treasurer for Park West Condominium Association 2012 to 2016
- Director at Large for Park West Community Association 2008 to present
- Commissioner for Clark Street Special Service Area (SSA #23) 2007 to present
- Director at Large for 345 Fullerton Parkway Condominium Association 2008 - 2014
- Associate of the Society of Actuaries (ASA), 1990. Enrolled Actuary (EA), 1994
- Other interests include Competitive Powerlifting (Won 1985 Wisconsin Junior State Championships and 1995 Illinois State Championships), international travel, volunteering, football, and golf.

SKILLS

LEADERSHIP
OPERATIONS
PEOPLE MANAGEMENT
COLLABORATION
PROBLEM SOLVING

EXPERIENCE

- | | |
|--------------|---|
| 2004-present | <p>Owner/Managing Member Chicago, IL KPLEX HOLDINGS, LLC</p> <ul style="list-style-type: none">• Acquired 11,000+ square foot commercial real estate parcel located at 444 W. Fullerton Parkway (NW corner of Clark & Fullerton).• Successfully managed property through three anchor-tenant turnovers (Emilio's to Zapatista in 2010, Standard Market Grill in 2013, and Casati's Modern Italian in 2018).• Maintained 94% occupancy rate over 18-year ownership period. |
| 1991-present | <p>Owner/CEO Chicago, IL LINCOLN PARK FITNESS CENTER</p> <ul style="list-style-type: none">• Founded neighborhood health club with over 350 active members and four employees in December 1991. Majority owner from 1991 to 2000 and sole owner/operator from March 2000 to present.• Operated club profitably since 1993 with profit margins ranging from 25% to 55% of revenue. Expanded revenue stream through implementation of annual Xmas tree sales.• Negotiated usage agreement with neighborhood condominium association that increased annual revenue by 20%.• Negotiated 11,000+ square foot commercial real estate purchase and relocated club in November 2003. |

1992 - 1995 Associate Actuary
WATSON WYATT WORLDWIDE Chicago, IL

- Consulted with management and union trustees on collectively bargained employee benefit plans. Provided financial modeling and analysis of cost implications on proposed plan modifications.
- Developed intern training program. Significant involvement in recruiting and staff development/mentoring.

EDUCATION

2000 - 2003 **KELLOGG SCHOOL OF MANAGEMENT** Evanston, IL
NORTHWESTERN UNIVERSITY
Master of Business Administration degree, June 2003

- Majors in Analytical Finance, Entrepreneurship & Innovation
- Member, Entrepreneurship/Venture Capital Club
- Completed degree while working full-time and managing own business. 3.5/4.0 GPA

1982 - 1987 **UNIVERSITY OF WISCONSIN - MADISON** Madison, WI
Bachelor of Business Administration degree, May 1987

- Triple Major - Actuarial Science, Quantitative Analysis, Risk & Insurance
- President of the Actuarial Science Club

| | | |
|----------------|--|-------------|
| 2005 - present | Owner/CEO WEBSTER/RAVENSWOOD FITNESS CENTER | Chicago, IL |
| | <ul style="list-style-type: none"> ● Acquired 25 year old health club business with over 500 members and implemented turnaround plan. ● Relocated club in 2010 and increased membership base to over 950 active members, and 18 employees. | |
| 2013 - present | Owner/CEO EDGEWATER FITNESS CENTER | Chicago, IL |
| | <ul style="list-style-type: none"> ● Expanded to third location. Obtained Small Business Improvement Fund (SBIF) grant. Offered over 35 (pre-pandemic) weekly fitness classes to over 700 active members. Created jobs for 15 active employees. | |
| 2015 - present | Chairman/Co-Founder/Parkinson's Advocate ROCK STEADY BOXING WINDY CITY, LTD | Chicago, IL |
| | <ul style="list-style-type: none"> ● Established specialized exercise program, designed to slow the progression of Parkinson's disease, to the City of Chicago. ● Provided 100's of people with PD the necessary resources to maintain their independence and quality of life through regular exercise and social interaction. ● Raised in excess \$150K as part of a 4-person, young-onset team that walked from the northern tip of Scotland to London, England over the course on 17 days in September of 2021: walk4parkinsons.org | |
| 1995 - 2003 | Consultant and Associate MERCER HUMAN RESOURCE CONSULTING | Chicago, IL |
| | <ul style="list-style-type: none"> ● Worked with senior management of large hospital client on design and implementation of new cash balance retirement plan. ● Instituted change in actuarial procedure that enabled client to save over \$60M in additional ERISA minimum funding requirements. ● Managed annual FAS 87 expense/disclosure project for office's largest client. Improved efficiency by 20%. ● Led office-wide training sessions on pension funding standards. ● Valued and analyzed cash flows for defined benefit pension plans. Consulted and advised on funding alternatives in conformance with government regulations. ● Served on valuation efficiency committee and recommended changes that became part of standardized office procedures. | |

JILL KRAWCZYSZYN

Pronounced "kraw-sis-en"

PROFILE SUMMARY

Creative, self-motivated, and results-oriented Large Deal Executive and Sales Team Leader with over 25 years of experience in large deals, consulting, delivery management, sales management, sales, executive business development, marketing, planning, and deal structuring and sourcing. Sold and closed billions in large, complex, multi-tower deals with contract values greater than \$50-500M+ TCV, across multiple industry sectors. Industries served include Government, Retail, Consumer Products, Media, Manufacturing, Utilities, Travel and Transportation, and Transit Local Government. I work with new and existing clients - across multiple industry sectors - to drive game-changing business performance outcomes for clients and develop unique, special relationships of trust.

EDUCATION

MIT SLOAN

Cambridge, MA

Executive Education Program-Course Participant

- Completed coursework on Management and Organization topics that was company sponsored.

INSEAD

Fontainebleau, FRANCE

Executive Education Programme

- Completed a company sponsored Executive Management Programme in Corporate Finance, Marketing and Strategy related to improving shareholder value for clients.

J.L. KELLOGG GRADUATE SCHOOL OF MANAGEMENT

Chicago, IL

NORTHWESTERN UNIVERSITY

Masters in Management MBA: Marketing, Finance, and International Business

- Evening Management Association (Student Government) President and V.P. Academics.
- Dean's Distinguished Service Award. Completed degree while working full-time and traveling for work.

THE OHIO STATE UNIVERSITY

Columbus, OH

Bachelor of Science: Industrial Systems Engineering

- Recipient of the General Motors Scholarship and the Alumni Scholarship (4 years)
- Ohio State Varsity Crew Team, Engineers' Council President, Chi Omega Sorority Officer

EXPERIENCE

Present

ATOS INTERNATIONAL

Chicago, IL

Vice President – Global Large Deal Team – 3/20 – Present

- VP in the Global Strategic Deal Team, leading large deal qualification and capture for several multi-tower deals between \$100 and \$500M TCV.
- Captive Center and alternative business model development including ODC to BOT, BOT, JV and Hybrid
- Managing all aspects of the deal cycle including deal shaping, Price to Win, solutioning, financial model options, deal specific marketing programs, bid management, storytelling, win strategy, sales themes and messaging, relationship building and touchpoint strategy, negotiations, and closure.
- Multi-tower scope includes cloud migration, desktop, midrange, MF, network, voice, applications, ServiceNow, help desk, BPO, consulting, applications, and infrastructure modernization.
- Deals include – Major Auto Maker, Global Transportation Company, Global Engineering Services Firm, and Global CPG, Retailer and Media Company

12/16- 12/18 **INFOSYS, LTD**

Chicago, IL

Associate Vice President – CPG, Retail, Logistics (CRL) Industry – 12/16 – 12/18

- Lead a dedicated Team of Delivery, Service line and Business Development Associates with a focus on the Retail, CPG and Logistics Industry in the US and Canada.
- TCV Goal is \$75M+; Pipeline currently at 3X TCV goal
- Sold a Global 5 country digital rollout of SAP HANA on AWS Cloud within first 90 days of joining, which set up 3 years of guaranteed and contracted revenue.
- Created and executed complex account planning sessions and plans for each target account to drive a portfolio of solutions over time and expand the footprint within each account.
- Large deal focus with over 3 deals between (\$50-200M) over the last 15 months
- Opened, closed and managed business at several F500 Clients

6/14-12/16 **TATA CONSULTANCY SERVICES**

Chicago, IL

US Sales Head – Travel Transportation and Hospitality (TTH) Industry – 6/14 – 12/16

- Leading a dedicated Team of 7 Experienced Business Development Executives, 2 Sales Operation Managers and a Marketing Manager for NA TTH, as well as Matrixed Presales and Solution Teams
- TCV Goal is \$150M+; Pipeline exceeding over 4X team quota.
- Large deal focus with over ten deals greater than \$25M in the pipeline over the last 18 months
- Opened and closed business at six+ new F500 “Dream Accounts” at clients that TCS was chasing for up to 10 years (Hyatt, Hertz, BBA Aviation, Transurban, MOL, Odjefell, Atlas Airlines, NetJets and others)
- Engaged in deal cycles with RFPs and/or sole source pricing with over 25% of the new logo Travel, Transportation and Hospitality Industry targeted “Go-to-Market” list.
- Executed a complete Go-to-Market Analysis and Sales Plan for the TTH Market
- Interviewed over 63 candidates to hire 6
- Successfully completed a portfolio of targeted campaigns on the following topics: RPA, AI, Mobility, IoT, BPS/BPO, Salesforce, Oracle, SAP, Big Data and others.
- Identified, selected and funded TTH Team participation in a full suite of Marketing and Professional Organization events (Cornell, CIO Summits, Railtrends, Dreamforce, US Open and others)
- Developed targeted collateral and marketing campaigns across multiple TTH segments (Rail, Airline, Hospitality, Logistics, etc.)
- Participated in weekly Cluster Head reviews and monthly President Reviews, as well as peer meetings
- Dedicated client and direct report advocate, with a player-coach style and creative strategic selling skills
- Participated in most deals cycles with the team, at a detailed level to offer deal shaping, legal and strategic guidance

8/11-6/14 **ACCENTURE LLP**

Chicago, IL

Role: NA Products Sales Team – Executive Capture Lead, 8/12 - Present

MAJOR MANUFACTURING CONGLOMERATE

Deal: \$200M+ – AO, IO, BPO F&A, BPO HR, BPO Procurement Service Areas

Status: RFP Submitted, Orals Completed

- Led the RFI and Orals response for a Multi-Tower \$200M Shared Services deal that includes AO, IO, BPO F&A, BPO HR, BPO Procurement
- Instrumental member of the Deal Team which delivered an exceptional, competitive proposal and 3 hour Orals in just one week.
- Participated as the Sales Lead in the response and orals sales messaging, positioning, differentiators, pricing strategies, content creation, finally editing and formatting and presenting.
- Led and coordinated the key meetings and contacts with the client team members in IT and Procurement
- Provided high level action tracking for the team throughout the response timeframe and coordinated all internal approvals for the submissions.
- Key member to assess and contribute to the Power Mapping and Overall Account Planning

MAJOR US AIRLINE CORPORATION

Deal: \$162M – Application Outsource and Innovation Service Areas

Status: RFP Submitted, Client declined due to Accenture strategy to Sole Source

- Assisted as the new member of the Deal Team tasked with creating and submitting a complex RFP for a

Dedicated Delivery Center for up to 1300 FTEs

- Instrumental member of the RFP Deal Team which delivered an exceptional, competitive proposal response to Client in just three days.
- Participated as the Sales Lead in the RFP sales messaging, executive summary, differentiators, pricing strategies, content creation and finally editing and formatting.
- Led and coordinated the key meetings and contacts with the client team members in IT and Procurement
- Provided high level action tracking for the team throughout the RFP timeframe.
- Key member to assess and contribute to the Power Mapping and Overall Account Planning

MAJOR US RAILROAD CORPORATION

- Originated a new pipeline of \$50M + in sales opportunities at this \$17B Railroad in 120 days
- Developed the Sales Messaging and Competitive Win Strategies for each deal
- Sale Lead/Originator executing three Oral Presentations, one RFI, three RFP's and two SOW's in less than four months
- Extensive client meetings with the CIO and VP's of Finance, IT, HR, Accounting and Operations, and their respective staff members
- Prepared a complex business case for the client for a 5 year AO capacity services deal
- Evaluated 4 years of trouble tickets and conducted IT organizational interviews to validate business case for the AO, EAM and HR opportunities
- Quickly developed client relationships, allowing access to executive initiatives such as the BPO F&A, BPO Procurement initiative, which will address \$1.6B in Indirect Services spend and delivers over \$100M benefits
- Key member of the Accenture Deal Team executing on legal, partnerships, SOW drafting, sales messaging, pricing and negotiating strategies
- Key pursuits include the following:

Deal: \$2M - SAP EAM Blueprint, Add-on \$20-40M FY14

Status: Awarded, Project Delivery started 4/13/13, Signed and Closed

Deal: \$1.5M - SAP HCM/SUCCESSFACTORS Blueprint, Add-on \$10-20M FY14

Status: Lost, RFP and Orals Complete

Deal: \$6.67M - SAP AO Capacity Services Agreement

Status: In Closing Process with Legal, Waiting for SOW Signature, SOW and Business Case Complete

Deal: - \$38M BPO F&A and Procurement for Indirect Services Spend of \$1.6B

Status: Scheduling Follow-up Executive Steering Committee, Demo on Tools Complete

Deal - \$10M+ est. SAP HANA Implementation with HP

Status: Identified Six Use Cases, Waiting for Data from Client

THE ILLINOIS TOLLWAY

Deal: \$44-100M+ - Electronic Tolling Solution

Status: Signed and Closed - Board Approved, Down Selected, BAFO Complete, Signed

- Developed the Sales Messaging and Competitive Win Strategy for this multi-year Electronic Tolling Solution for this Illinois Agency
- Instrumental member of the RFP Deal Team which delivered an exceptional winning proposal response based on 7000 requirements, resulting in 900+ pages of content and complex State Agency requirements, in only five weeks
- Participated as the Sales Lead in the RFP sales messaging, pricing, legal, third party vendor coordination, content creation, packaging, management of staff activities and ultimately delivering the RFP to the client
- Led and coordinated the winning Orals preparation for the team which included 5 hours of detailed and complex system/solution demonstration and one hour of targeted Q&A
- Provided detailed, daily activity and action tracking to the team throughout the RFP and Orals
- Worked closely with SAP Management and three members of the SAP Demo Team to execute key parts of the demo agenda for Accenture and assist in helping our team with presentation techniques
- Prepared and prepped the Third Party Orals Coach on the team, presenters, style, competition, strengths, weaknesses and messaging for the deal

Deal: \$10+M- ERP SAP Implementation

Status: RFP Complete, RFI Orals Complete, Complete

- Developed the Sales Messaging and Competitive Win Strategy for this \$10+M, 17 competitor ERP RFI
- Participated as the Deal Shaper for the Orals Presentation
- Led and coordinated the Orals preparation for the team, which included six SE's
- Provided detailed, daily activity and action tracking to the team throughout the RFI Orals

MAJOR MULT-STATE TRANSIT AUTHORITY

Deal: \$185+M - Fare Management Solution and Outsource

Status: Signed and Closed - Board Approved, Down Selected, BAFO Complete, Signed

- Developed the Sales Messaging and Competitive Win Strategy for this \$125+M multi-year Fare Management Deal- current sales cycle has been three years
- Participated as the Deal Shaper through four written Client Clarifications, Orals and Bid resubmissions in 5 months, coordinating with partners, preparing and reviewing financials, legal and content for the submissions
- Crafted the value proposition for the Accenture Fare Management offering
- Working closely with Accenture OCM, PR and the deal team, developed and executed a 7 month tactical Offensive Marketing Plan which changed the game and included targeted, competitive mitigation actions laced throughout the deal cycle including: Webinars, Mailing, Email Campaign, Industry Events, PR Placements and client placed information
- Drafted an effective sales focused Orals Video which included Pierre Nanterme, CEO, and has been used an example for other deal teams
- Prepped and coordinated the deal team for full-day Orals and worked extensively to storyboard an effective demo with the team
- Prepared and prepped the Third Party Orals Coach on the team, presenters, style, competition, strengths, weaknesses and messaging for the deal
- Instrumental in drafting with legal, a new commercial model for the overall deal structure that changed Accenture's win position after two years

OTHER DATA

- Interests include: local politics, cultural activities, global travel, the great outdoors, real estate investing, sailing, scuba, kayaking, crew and dogs
- She is former nationally ranked competitive Rower and US Rowing National Championship (2001, 2002, 2003) and Certified Scuba Instructor
- She lives in the 43rd Ward with "Bow the Pointer"
- Languages: Spanish, 5 yrs.

REFERENCES Available upon request.

Date: August 2022

MICHAEL D. JURECKI, CFA

SENIOR CORPORATE DEVELOPMENT EXECUTIVE

Mergers & Acquisitions | Strategic Plan Development | Financial Analysis and Valuation

Accomplished, analytical and goal-oriented executive with a comprehensive corporate development background encompassing the areas of mergers and acquisitions, financial analysis and valuation, strategic planning and business plan development. Excellent interpersonal skills with proficiency in leading teams, engaging in negotiations and delivering insightful presentations. Recognized by peers as a proactive visionary with consistent demonstrated expertise in formulating innovative solutions and analytic metrics to achieve objectives. Track record of successful accomplishments. Specific areas of expertise include the following:

- Corporate Development
- Mergers & Acquisitions
- Strategic Planning
- Financial Analysis and Valuation
- Negotiations
- Business Plan Development
- Client Relationship Management
- Product Development Processes
- Analytic Metrics
- Management Presentations
- Post-Closing Integrations
- Alternative Investments

CORE ACCOMPLISHMENTS

- Recognized as an expert in leading high profile acquisitions, including Gresham Investment Management and FAF Advisors acquisitions in 2011 and 2010, respectively.
- Expertise in spearheading organizational transformations, such as leading the strategic process to migrate from municipal specialist to broad-based investment manager and a firm's venture into international markets.
- Demonstrated success simultaneously leading multiple teams of internal and external constituents on longer-term engagements through utilizing broad industry expertise and strong interpersonal skills.

PROFESSIONAL EXPERIENCE

INDEPENDENT CONSULTANT, Chicago, IL

2015 – Present

Consulted eight firms on a variety of corporate development and strategy projects; projects encompassed capital raising, financial modeling and analysis, product development and transaction advisory.

- Algert Global – Produced detailed assessment of existing economic arrangement with former partner and proposed alternatives for restructuring such arrangement. Provided financial analysis and structural review of contemplated acquisition.
- Astor Investment Management – Coordinated due diligence efforts, developed financial projections and provided quantitative and qualitative analysis of an acquisition proposal.
- BDV Group – Explored capital raising opportunities on behalf of two hedge funds and advised client on due diligence process as part of a reverse merger.
- FIRVA Capital Management – Provided framework for a strategic partnership for a new product initiative.
- THL Credit Senior Loan Strategies – Assessed opportunities to expand product portfolio into subadvised and annuity products.

NUVEEN INVESTMENTS, Chicago, IL

1998 – 2014

Senior Vice President, Corporate Development (2009-2014)

Vice President, Corporate Development (2002-2008)

Assistant Vice President, Corporate Development (2000-2001)

Led the development of comprehensive business plans for priority acquisition candidates; plans pertained to diverse areas such as sales and marketing, product development, shelf space and personnel requirements.

- Developed and implemented formal external development strategy, facilitating extensive candidate assessment (300+ candidates) ranging in value from \$10M to \$8B+.
- Led all facets of the acquisition process including target identification, due diligence, financial modeling and valuation, deal structuring, development of internal support, management presentations, transaction negotiations, joint business planning and post-Closing integration.
- Served as a key team member conducting targeted searches of potential international partners on a global scale (covering 30+ firms on three continents).

- Functioned as a core member of a multi-disciplinary team responsible for new product development for mutual funds, alternative investments and separately managed accounts.
- Delivered insightful presentations internally to the Board of Directors and Executive Committee and externally to senior leadership of targeted acquisition candidates.
- Represented Nuveen as a member of the Gresham Operating Committee which oversaw budgeting, financial results, investment performance and strategic planning.
- Produced and oversaw detailed five-year financial projections for priority acquisition candidates.
- Oversaw \$180M seed capital portfolio and played an instrumental role in new product development decisions.

Key Achievements:

- Led the 2011 acquisition of 60% of Gresham Investment Management, leading to the addition of \$14B of AUM.
- Co-led the 2010 acquisition and integration of FAF Advisors, resulting in the addition of \$27B of AUM, a long-term strategic relationship with U.S. Bancorp and \$20M in cost savings.
- Led the 2008 acquisition of Winslow Capital Management, which expanded from \$4B of AUM to \$30B+ of AUM within three years of Closing.
- Participated in the evaluation of 20 potential parent-level transactions encompassing sale of the firm, mergers of equals and go-public scenarios (with transaction values ranging from \$6B to \$15B+).
- Directed an alternative investment search that subsequently identified 100+ firms, effectively achieving relationships with 30+ hedge fund, hedge fund of funds, private equity and liquid alternatives managers.

NUVEEN INVESTMENTS, Chicago, IL

1998 – 2014

Associate, Corporate Development (1998-1999)

Led strategic planning processes, increased management's external orientation, provided guidance for future business initiatives and developed measurable performance metrics

Key Achievements:

- Co-designed and implemented the firm's first formal strategic planning process to accelerate transformation from municipal specialist to broad-based investment manager.
- Played a leadership role in the firm's venture into international markets, which involved market assessments, analysis of potential distribution and asset management partners and development of entry strategies.
- Established framework for analyzing potential acquisition candidates, resulting in the evaluation of 40+ firms.

VAN KAMPEN INVESTMENTS, Oakbrook Terrace, IL

1992 – 1998

Senior Fixed Income Analyst, Assistant Vice President (1997-1998)

Fixed Income Analyst (1996-1997)

Led financial and operational restructuring of 18 credits valued in excess of \$250M, which involved the review of budgets, analysis of strategic plans, and supervision of legal counsel, consultants and project managers

Key Achievements:

- Reorganized individual responsibilities within high-yield group, substantially improving market responsiveness.
- Valued 110 distressed securities worth approximately \$4B using discounted cash flows, asset values, multiples and liquidation values.
- Managed the development and implementation of a proprietary database for 750+ credits with market value of approximately \$5B.

Senior Associate Fixed Income Analyst (1994-1995)

Associate Fixed Income Analyst (1992-1994)

Key Achievements:

- Delivered informative monthly presentations to the investment committee pertaining to the structure and credit quality of eight portfolios.
- Performed credit and relative value analysis of 90+ healthcare credits valued at approximately \$1.5B.
- Established policies and procedures for the analysis of tax-exempt healthcare debt.
- Trained three junior analysts to effectively analyze investment-grade healthcare bonds.

NUVEEN INVESTMENTS, Chicago, IL

1991 – 1992

Municipal Financial Analyst

Key Achievements:

- Presented strategic credit recommendations to the credit review committee on a bi-weekly basis.
- Evaluated credit quality of approximately \$1B of fixed income securities.

EDUCATION

Northwestern University, J.L. Kellogg Graduate School of Management, Evanston, IL
Master of Management, 1997

University of Illinois, Urbana-Champaign, IL
Bachelor of Science, Finance, 1991

CERTIFICATIONS

Chartered Financial Analyst

Norman Hutchinson



Professional Summary

Reputed and highly creative Brand Touring/Sales Professional & Independent Contractor, with expertise in providing quality services. With over 12 years experience in branding and traveling throughout the world. Being a team player and a hard worker explains my work ethic and pursuit for doing the job the right way.

Experience

Brand Touring/Independent Contractor-2022-2011

*Brand Manager for the Air & Water Show for Arizona Tours

*Lead Sales Representative for Southwest Airlines Annual Taste Of Chicago Events

*Brand Ambassador/Model for Nike at the Annual Chicago Marathon

*Brand Touring/Model for BMW Automotive Conferences

*Brand Ambassador/Model for Facebook Virtual Reality V.I.P. Members Conferences

Professional Development/Education

*High School Diploma

*Certified Life & Purpose Coach at Yale University

PAUL KENDRICK

WORK EXPERIENCE

Community Representative, Alcott Elementary Local School Council July 2022 – Present

- Public outreach to increase neighborhood involvement, enrollment, and input to strengthen the school
- Contribute to the school's progress measured against the continuous improvement plan and goals

Executive Director, Rust Belt Rising July 2019 – Present

- Recruited over 700 leaders across the Midwest to train on organizing for change and policy solutions for economic development and neighborhood/community vitality
- Administer the organization, manage organizers, plan events, and fundraise major and small gifts with the Board of Directors to support a \$200k+ budget
- Create messaging, design polling research, and partner with state and local parties to provide trainings
- Led a voter registration program that recruited 3,704 volunteers, made 600k voter calls, and helped 47,841 Wisconsin and Michigan register to vote to rebuild the Blue Wall and defeat Donald Trump

Adjunct Professor, National Louis University Sept. 2019 – Present

- Facilitate career development for first-generation college students to clarify interests, search for opportunities in Chicago, and prepare for and get professional opportunities
- Teach a service-learning class for student teams to solve a problem for a Chicago human service organization using a design innovation process

Lake County Regional Get Out the Vote Director, Pritzker for Governor Sept. 2018 – Nov. 2018

- Project managed GOTV and Underwood campaign coordination, supporting stakeholders and organizers

Domestic Director and Advisor, Presidential Personnel, The White House Feb. 2016 – Jan. 2017

- Recruited, selected, vetted, and coached to retain 500+ presidential appointees for eight domestic agencies such as the Dept. of Education to help the Obama White House and federal departments build the most diverse, talented teams possible
- Used strategic judgment and stakeholder management to advance initiatives in government, handling confidential personnel and political matters with high-level officials, and successfully managing complex processes against aggressive timelines
- Increased retention and effectiveness of appointees through leadership development programming
- Wrote memos to President Obama recommending courses of action for nominations and appointments

Director of Coalition & Grassroots Engagement, Opportunity Nation May 2014 – Feb. 2016

- Grew a coalition of 350 organizations and businesses using outreach and partnership skills to pass legislation increasing young people's career opportunities: Workforce Innovation and Opportunity Act
- Recruited and trained 80 young advocates to be grassroots ambassadors for the campaign
- Drafted a policy plan for increasing youth employment and educational opportunity in America
- Organized a national summit on improving opportunity, co-convened with the United Way and U.S. Chamber of Commerce, attended by a thousand business, government, youth, and nonprofit leaders

Special Assistant (Presidential Appointee), U.S. Department of Education April 2013 – May 2014

- Elevated promising approaches in K-12 education through digital communications, including a website, *Progress*, and social media content
- Drafted regulatory documents and hosted webinars to communicate grant application processes to school systems and other practitioners

Associate Director, Alumni Project, Presidential Inaugural Committee Dec. 2012 – Jan. 2013

- Coordinated a day-long career training event attended by 700+ Obama campaign staff members

Youth Vote Director, Obama for America – Wisconsin**Feb. 2012– Nov. 2012**

- Led the campus program for President Obama and Senator Tammy Baldwin, managing 10 organizers
- Drove collection of 30,000 pledge vote cards, registering 15,000 students and activating more than 1,000 volunteers, increasing turnout from 2008 in wards of major campuses

Director of Policy, Single Stop USA**Dec. 2010 – Feb. 2012**

- Mobilized a coalition around integrating government benefit program enrollments to make health, human service, and other anti-poverty programs more accessible for Americans
- Crafted user-friendly policy updates—researching and communicating national and state-based changes

Director, College Success Office, Harlem Children’s Zone**May 2007 – Nov. 2010**

- Grew the program from 130 students and a staff of 3 to 760 participants and a staff of 29, hiring high-performing team members and using data to drive program improvement
- Achieved 85% of participants enrolled in college with retention rates closing the achievement gap
- Coordinated high school college access sites, community college support initiatives, tutoring, a summer academic intensive to help students avoid community college remedial/developmental classes, career development workshops, and a summer job/professional development program for over 100 students
- Customized a case management system with indicators, metrics, staff support systems and action plans for all students to provide academic, emotional, and financial aid support

Presidential Administrative Fellow, George Washington University**Office of Government and Community Relations****May 2005 – May 2007**

- Organized a neighborhood business association to elevate local businesses and generate collaboration among them to publicize the neighborhood’s assets and events

VOLUNTEER COMMUNITY INVOLVEMENT

- Lightfoot for Chicago campaign, Uptown office, Volunteer
- The Happiness Club (Chicago arts education youth nonprofit), Board Member and Volunteer
- Indivisible Lakeview/Lincoln Park/Old Town, Steering Committee Member
- Indivisible Chicago Alliance, Council Member
- Wrightwood Neighbors Association, Member
- Lincoln Central Association, Bauler Park Advisory Board
- 43rd Ward Democrats, Executive Committee and Voter Registration Volunteer

PUBLICATIONS

- Co-author, *Nine Days: The Race to Save Martin Luther King Jr.’s Life and Win the 1960 Election*; Farrar, Straus and Giroux, 2021. A *New York Times Book Review* Editors’ Choice, *Oprah Magazine* “Book You Will Love,” and recommended by President Obama on Twitter
- Co-author, *Douglass and Lincoln: How a Revolutionary Black Leader and a Reluctant Liberator Struggled to End Slavery and Save the Union*, Walker Books, 2008
- Co-author, *Sarah’s Long Walk: The Free Blacks of Boston and How Their Struggle for Equality Changed America*, Beacon Press, 2005
- Articles in *Chicago Sun-Times*, *New York Times*, *Washington Post*, *USA Today*, *Fortune*, *Huffington Post*, *Talking Points Memo*, *The Capital Times* (Madison, WI), and *American Heritage*

EDUCATION

- Master of Public Administration (Nonprofit Management), 2007, George Washington University
- Bachelor of Arts (American Studies), 2005, George Washington University

Resume – Rebecca Janowitz



Education:

- **University of Sussex, BA in History** – 1969-1973
 - **Loyola University of Chicago Law School, JD** – 1973-1976
 - **University of Chicago Harris School of Public Policy, Master of Public Policy** – 2006-2008
-

Work Experience:

- **Legal Assistance Foundation, VISTA** – 1976-1977
 - **South Dakota Legal Services, Staff Attorney** – 1977-1979
 - **Pecquet and Janowitz, Partner** – 1979-1995
 - **Office of Alderman Toni Preckwinkle, Special Assistant** – 1995-2001
 - **Chicago Public Schools, Coordinator of Special Projects** – 2001-2007
 - **Cook County Sheriff's Office, Director of Reentry Services** – 2007-2010
 - **Cook County Justice Advisory Council, Special Assistant for Legal Affairs** – 2010-2021
-
- Author of **Culture of Opportunity: Obama's Chicago – the People, Politics, and Ideas of Hyde Park** (2010)

Steeg Pierce



Experience

November 2015 - PRESENT

WH Trading, Chicago - *Trader*

- Traded Eurodollar options OTC and electronically on company's biggest book
 - Worked profitably and autonomously in variable environments
- Traded natural gas options over the counter and electronically
 - Leveraged broker relationships into better execution and information

August 2013 - September 2015

Liquid Capital Markets, Chicago - *Trader*

- Built broker relationships for OTC trading while executing on electronic markets
- Wielded proprietary technology to identify volatility misalignments

Education

Coursera

- Data Science Specialization: Johns Hopkins
- Python Programming: University of Michigan

June 2013

University of Chicago - *BA, Economics*

- President, Delta Kappa Epsilon: grew rushing program and started annual 5k
- Relevant coursework: Economics of Crime taught by Steve Levitt

Community

2012 - Present

Resident - *43rd Ward*

- First as a renter and then as a homeowner in Hemingway House Condo Building

2016 - Present

streamofsteeg.com - *Writer*

- Write about economic problems and proposed solutions for all stakeholders
- Built a semi-weekly email newsletter

2020 - Present

Rotary Club - *Copywriter, Rotary Zone Institute*

- Organized content and wrote copy for newsletter promoting annual leadership institute

2020 - Present

State and Local Government Subcommittee - *Public Affairs Committee, ULCC*

- The subcommittee is charged with mounting public forums on:
 - Key issues, elections, and candidates

Activities

Boxing (fought in Chicago's Golden Gloves), cycling, backpacking, overlanding, traveling

STEVEN McCLELLAN



COMMUNITY-MINDED BUSINESS LEADER

Community-focused business owner with an eye for connecting people across the educational, political and social spectrum. I care about ensuring folks are heard, and lend a personal touch to all business dealings. I believe in persistence, and build my businesses to serve the community and contribute to the greater good.

Consensus building
Community engagement
Youth advocate
Savvy financial planner
Budget reconciliation
Business development

43RD WARD COMMUNITY SERVICE

- LaSalle Language Academy Local School Council Community Representative (Vice Chair)
- 1800 Cleveland/Hudson Green Alley Improvement Project: Identified major issue with alley drainage, created door to door survey for neighbor input, and co-chaired neighborhood committee to address the issue
- Bauler Park Upgrade
- Candidate for 43rd Ward Alderman in 2015 and 2019
- Basketball Coach at Menomonee Club for Boys and Girls

EXPERIENCE

McClellan Holding Company LLC d.b.a GOODFOOD CHICAGO, Chicago, IL | 2019-present

Owner

Key impact: Planned and led B2B sales and food vending at over 50 summer festivals both in the US and internationally. Responsible for end to end business ownership, menu planning, budgeting and event execution

- Created and maintained festival budget including goods, services and event staff
- Envisioned menus and conducted recipe testing in different regions to optimize sales and customer experience
- Managed growing social following to facilitate demand generation

Youth Producers Afterschool Programming, Chicago, IL | 2009-present

Founder

Key impact: Identified and engaged target schools for afterschool programming, providing educational and physical wellness support to a wide range of students. Responsible for business development in new markets, as well as implementation of revenue-driving strategies leading to YoY business growth

- Managed all technical aspects of programming, including computer editing systems, electronic titling systems, video switching equipment, and digital video effects units
- Supervise all on-site activities and events, including resolving escalated issues and building relationships with parents
- Implemented equitable hiring practices to ensure program staff reflected communities they served

3 Point Athletics Inc., Chicago, IL | 2009-2019

Athletic Coordinator - Lincoln Park

Key impact: Developed curriculum guidelines for all programs; coordinated with Athletic Directors and managed all programs, budgets and timetables in a complex and changing environment across five sports programs and afterschool programs

- Managed budget preparation for three sports leagues and school-year programs, aligning to stated goals
- Partnered with schools to create private leagues, tournaments, travel teams and afterschool programs
- Responsible for performance management for coaches during programs and leagues, providing feedback to drive a high performance environment
- Manage relationship with schools in Lincoln Park to provide athletic afterschool programming

After School Matters (North/North West Branch) Lutz Center, Chicago, IL | 2017

Program Specialist

Key impact: Support and assist instructors to implement best practices within programs to over 13,000 underserved teenagers; perform daily site visits to ensure programs adhering to Afterschool Matters mission statement and guidelines; build strong relationships with program partners and parents; managed all program compliance

- Ensure that all required data, including attendance, enrollment, incident reports, program verifications, and surveys were entered into the database system accurately
- Coordinate with instructors and program liaison for background check verification
- Scheduled all transportation for over 25 programs
- Successfully identified and resolved program issues resulting in all teens receiving their stipend on time

Chicago Board of Trade - Commodities, Chicago IL | 2002 -2010

Brokers Assistant

Key impact: Managed \$7M in weekly transactions; served as liaison and led daily strategic meetings with pit brokers and international clients

- Open outcry trading
- Responsible for data collection, analysis and summary
- Agile management of trade volume, receiving and endorsing orders via headset, hand signals, and brokers in-hand contracts during market hours
- Led daily strategy briefing
- Handled all aspects of outtrades
- Ability to read, analyze and relay information under extreme pressure

EDUCATION

Bachelors, Communication

University of Illinois Urbana-Champaign | 2005

TAMAR SUSAN NEWBERGER

SUMMARY

Computer scientist and executive in high-tech industry. Civic activist and volunteer. Diplomatic Spouse.

EXPERIENCE

DEMOCRACY 21 CONSULTANT

NEW YORK, NY
2017-2018

Built business plan for expansion of Democracy 21's (D21) Participatory Budgeting (PB) platform. D21 is the technology underpinning New York's city-wide PB as well as that of many European municipalities.

U.S. EMBASSY, PRAGUE SPOUSE, U.S. AMBASSADOR

PRAGUE, CZECH REPUBLIC
AUGUST 2014-JANUARY 2017

Planned and executed initiatives that advanced U.S. State Department goals, in particular those concerning women's leadership, entrepreneurship and STEM. Co-founded women's leadership forum under embassy auspices. Successfully brought together U.S. companies with local stakeholders to underwrite programs furthering women's entrepreneurship. Frequent speaker on these topics around the Czech Republic. Mentored local women on careers in tech.

CATBIRD NETWORKS CHIEF MARKETING OFFICER Executive Management Team

SILICON VALLEY,
NEW YORK, NY & CHICAGO, IL
AUGUST 2004-DECEMBER 2013

Brought in by CEO to turn around company. Catbird became one of the leading brands in the cloud and virtualization security space. Responsibilities included overall corporate strategy, product evangelism and PR.

TARANTELLA INC. Director, Enterprise Accounts and Channel Sales Director, Product Marketing and Analyst Relations

NEW YORK, NY & SANTA CRUZ, CA
October 2002-August 2004
September 2000- October 2002

Tarantella, a pioneer in thin-client computing, was a public company with a sales channel into both Global 1000 and SMB accounts.

SCO, INC. Director, UNIX Server Product Marketing and Product Management

MURRAY HILL, NJ
1996-2000

SCO revenue during this period was over \$200M/year with greater than 40% market share of all UNIX system software. The UNIX products brought in nearly all of the total corporate revenue. UnixWare 7 won Byte Magazine's Operating System of the Year Award, 1998.

NOVELL, INC. Senior Product Planner; Product Marketing Manager; Product Engineer

FLORHAM PARK, NJ
1993-1996

Directed key company-wide projects that defined, deployed and marketed Novell's next-generation operating systems.

MAGIC SOFTWARE ENTERPRISES, INC. Product Marketing Manager

TEL AVIV, ISRAEL
1992-1993

Managed the UNIX product marketing for \$17 million company selling an object-oriented Rapid Application Development tool.

AT&T BELL LABORATORIES, INC. subsequently UNIX SYSTEM LABORATORIES, INC. Systems Engineer, Member of Technical Staff

1985-1990
1990-1992
SUMMIT, NJ

Engineered the requirements for USL's UNIX System V Release 4.2MP, a fully multithreaded SMP version of the operating system. This product became an industry standard and the basis of UNIX products by major OEM's.

EDUCATION

COLUMBIA UNIVERSITY
M.S., Computer Science (AT&T Bell Laboratories OYOC Fellowship)

NEW YORK, NY
1986

COLUMBIA UNIVERSITY, BARNARD COLLEGE
B.A., Computer Science, *cum laude*

NEW YORK, NY
1985

CIVIC ACTIVITIES & BOARDS

Board of Trustees, HIAS (2019-Present)
Board of Trustees, Francis W. Parker School (2018-present)
Board Member, The In[Heir]itance Project (2019-present)
Board Member, Camp Ramah in Wisconsin (2013-present)
Council Member, Presidential Appointment, United States Holocaust Memorial Museum (2017-2021)
Trustee, International School of Prague (2015-2017)
Member of the Board, Young Women's Leadership Charter School (2009-2014)
Trustee, Chicago Jewish Women's Foundation (2006-present)
Member, Obama 2008 Technology, Media and Telecom Advisory Committee
Member, Obama 2008 and 2012 National Finance Committee

Timmy Knudsen

he/him/his

Bar

Admission: Illinois State Bar Association, Admitted November 2015

Professional Experience

Croke, Fairchild, Morgan & Beres

Chicago, IL

Partner

June 2020 – Present

- Recruited as firm's 8th partner to build a V.C. & Founders Group (firm has grown to 40+ lawyers).
- Serves as external general counsel to startups and an investor portfolio including well-known family offices, high net worth individuals, and V.C. funds, owning all legal tasks from term sheet to closing and thereafter.
- Closed 25+ convertible and equity rounds since June 2020 (from 'pre-Seed' to \$100million+ Series C's), including a deal recently named by *Pitchbook* as one of "the six VC deals that help define 2021".
- Established firm's Pro Bono Practice, focusing on asylum rights with the National Immigration Justice Center and reducing the gap in small business/startup funding towards historically undercapitalized founders.
- Drafted 30+ asylum applications (I-589) on sabbatical to serve an LGBTQ+ migrant shelter in Tijuana, Mexico.

City of Chicago Zoning Board of Appeals

Chicago, IL

Chairman

October 2020 – Present

Alternate Member

September 2019 – October 2020

- Appointed by Mayor Lori Lightfoot to serve as Chairman of the quasi-judicial board, which governs over variations from the Zoning Code, special use permits, and appeals of Zoning Administrator decisions.
- Directs all ZBA meetings from start to finish, coordinating applicants, objectors, lawyers, experts and staff.
- Implementing ongoing updates to ZBA application and general processes to streamline for equity and efficiency.

Katten Muchin Rosenman LLP

Chicago, IL

Associate, Corporate Department

Summer 2014 – June 2020

- Ran and negotiated M&A and private equity transactions ranging from \$5 million - \$400 million.
- Assisted as external general counsel to 4 startup clients and 2 family offices.
- Led 8+ Series A rounds for a corporate V.C. client investing in the clean energy technology space.
- Listed on the Katten Pro Bono Honor Roll for 4 years straight for representation of LGBTQ applicants for political asylum (in Chicago and Calexico border) and tax organization of two Illinois not-for-profits.

United States Senate Judiciary Committee

Washington, DC

Law Clerk for Senator Richard J. Durbin

Summer 2013

- Researched immigration issues that arose in debate during bill proceedings and drafted talking points used by "Gang of Eight" Senators in passing immigration reform out of Committee and Senate.
- Created comprehensive "Guantanamo Report" used by the Senator in hearing on presidential powers.

Institute of Government & Public Affairs

Chicago/Urbana, IL

Charles P. Wolff Memorial Fellow

June 2011 – June 2012

- Selected for fellowship to prepare an Illinois student for leadership in policy and public service.
- Liaison for University on state public policy issues and planned legislative conferences on pension reform.

Education

University of Illinois College of Law

Champaign, IL

Juris Doctor

May 2015

- Editor of Admissions of the *University of Illinois Law Review*
- Student Body Vice President of the University of Illinois at Urbana-Champaign
- Law Clerk at the Technical Review Unit of the Illinois House of Representatives
- PILI Fellow at the Land of Lincoln Legal Assistance Foundation (Domestic Violence Services)

University of Illinois – Urbana/Champaign

Champaign, IL

Bachelor of Science in Political Science, Minor in Business & Spanish

May 2012

Leadership Roles:

Advisor to 'LGBTQ Pride Fund I' (impact fund); Member of P33 Chicago's '33 Council; Member of Equality Illinois' PAC Board; Chairman of 43rd Ward Candidate Review Panel; Advisor to local and federal elected officials.

Honors:

Leadership Greater Chicago Class of 2022; *Crain's* 2020 List of Notable LGBTQ Executives; *Windy City Times'* 2019 LGBTQ '30 Under 30' List; recipient of the firm-wide 2018 Katten Award for Excellence in Pro Bono Service.

WENDI TAYLOR NATIONS

| | |
|-------------------------|--|
| PROFILE | Business and community leader using skills and experience to promote and defend economic development, community services, healthcare and public education organizations that contribute to the public good. |
| PROFESSIONAL EXPERIENCE | <p>HAWTHORNE STRATEGY GROUP (HSG) FEB 2017 - PRESENT</p> <p>EVP & PARTNER</p> <p>Partner in mid-size, full-service communications firm. Clients include Metropolitan Pier and Exposition Authority (MPEA), Choose Chicago, DuSable Museum of Black History, Vyaire Medical, Tactile Medical, Amarillo College, Amarillo Economic Development, and Women’s Business Development Center.</p> <p><u>Accomplishments</u></p> <ul style="list-style-type: none">▪ Vyaire Medical<ul style="list-style-type: none">○ Drove vital information through rapid communications system to 2000+ members of the global medical community about using Vyaire ventilators to manage Covid-19.○ Prepared for and confronted potential hostile federal government action by developing relationships with local, state, and U.S. representatives at Vyaire manufacturing sites.○ Inserted Vyaire senior leadership into the conversation about Defense Production Act.▪ DuSable Museum of Black History and Education Center<ul style="list-style-type: none">○ Protected/improved DuSable’s reputation after high-profile Board departures and negative media.○ Drove global media coverage for the DuSable premiere of “The March,” a virtual reality experience of MLK Jr.’s 1963 march to Washington, D.C. produced by Viola Davis and <i>Time</i>.▪ Led a media campaign highlighting racist hate mail received at the museum resulting in regional media attention and \$27 million in state grants for increased security (pending).<ul style="list-style-type: none">○ Helped increase donor support by 56% since March 2020 by creating pandemic-related communications from CEO to stakeholders to maintain interest and support for DuSable.▪ Tactile Medical<ul style="list-style-type: none">○ Developed stakeholder communications to defend company from competitive actions and helped achieve lawsuit dismissed.▪ Amarillo College (AC)<ul style="list-style-type: none">○ Inserted AC leadership into national conversations about community college financing. Achieved multiple top-tier media, including <i>The Atlantic</i> and a profile in the 2020 feature film “The Antidote.”○ Launched AC’s “Innovation Outpost” to advance industrial innovation, digital transformation, and skill development in the Texas Panhandle.○ Launched AC’s Cinematic Arts program to gain share of \$1 billion Netflix investment in Albuquerque, NM. <p>WORLD BUSINESS CHICAGO (WBC) FEB 2014 – FEB 2017</p> <p>CHIEF MARKETING AND COMMUNICATIONS OFFICER</p> <p>CMO of the City of Chicago’s public/private economic development organization, then chaired by Mayor Rahm Emanuel. Tasked to grow Chicago’s \$560+ billion economy and bring new jobs to the city.</p> <p><u>Accomplishments</u></p> <ul style="list-style-type: none">▪ Created Chicago’s first global marketing plan, with measurable objectives and messaging hierarchy, to expand WBC brand from job attraction/retention, to long-term economic development.▪ Increased top-tier earned media coverage by 73%; social media engagement by 32%; website time on-site by 22%; and exceeded industry standard newsletter click-through rate by 65%.▪ Expanded into priority global markets (China/U.K./Mexico) to drive foreign direct investment (FDI) growth to over \$100 billion. Campaign results included:<ul style="list-style-type: none">○ IBM ranked Chicago 1st in North America and 6th globally in significant FDI projects○ <i>Economist Intelligence Unit</i> designated Chicago among the world’s ten most competitive cities○ A.T. Kearney’s Global Cities Index ranked Chicago among the top 10 cities in the world▪ Achieved over 50,000 new jobs through campaigns promoting Chicago to companies planning corporate moves, including ConAgra, McDonald’s, Kraft/Heinz, GE Healthcare.<ul style="list-style-type: none">○ <i>Site Selection</i> designated Chicago as “#1 Metro for Corporate Investment” four years in a row |

FLEISHMANHILLARD

OCT 2012 - FEB 2014

PARTNER & SVP

Reported to Senior Partner/Managing Director, Central Region.

- Led multi-agency, 97-member team to win \$37 million Get Covered Illinois business, the rollout of the Affordable Care Act, one of the largest government-sponsored consumer marketing campaigns in history.
- Oversaw all team functions, including marketing planning and all marketing channels (paid/earned media, web, social, elected officials, faith leaders, neighborhood/community partners, celebrity partners).

Accomplishments

- Exceeded federal enrollment target of 143K by 52%, for a total of 217K enrollees.
- Additional 405K enrolled in expanded Medicaid
- 2.8 million visitors to GetCoveredIllinois.gov; 32 million social video views
- Almost 700 broadcast earned media stories; nearly 1.7 billion paid media impressions
- Multiple awards, including 2014 'Best Integrated Advertising Campaign' (*Modern Healthcare/Advertising Age*) and two Emmys for Outstanding Achievement in Public Affairs.

BURSON-MARSTELLER

2012

FREELANCE CONSULTANT, HEALTH PRACTICE**HEIDRICK & STRUGGLES**

2010 - 2011

CHIEF MARKETING OFFICER

Reported to CEO of NASDAQ-traded (HSII) company with annual revenue of \$550 million and \$14+ million marketing budget; created firm's first global marketing plan to support brand re-positioning.

Accomplishments

- Positioned H&S with top-tier media including Bloomberg, CNN, *Financial Times*, Reuters, *Chicago Tribune*, "60 Minutes", CNBC and *USA Today*; increased brand media impressions by 900%.
- Drove brand visibility for global initiatives, including the first media relations effort in support of H&S Strategic Partner role with the World Economic Forum.
- Successfully managed crisis issues, including executive departures, stock performance, competitive actions, etc.
- Re-launched and developed measurement systems for Heidrick.com. Drove almost \$4 million in revenue, or an average \$80k per lead.

PORTER NOVELLI

2001 – 2010

EVP, GENERAL MANAGER

Reported to CEO; responsible for business development, visibility and operations of Midwest P&L. Grew business from \$3 million to \$6+ million and from 12 to 28 employees. Worked to establish/maintain leadership positions, support new product launches, and manage crisis and reputation issues for global clients.

- Established both domestic and global business in new categories, including food (McDonald's, Bel Brands), employee recruitment/technology (Monster.com), finance (PowerShares), alternative energy (ethanol industry/Indy Racing) and transportation/aftermarket (Veolia Environment, Molex Electronics)

**ADDITIONAL
EXPERIENCE****HILL AND KNOWLTON**

1998 -2001

Senior Managing Director

ADVOCATE HEALTH CARE, Oak Brook, IL

1993-1998

Director of Marketing

STURM ROSENBERG CAFFERATA ADVERTISING, Chicago, IL

1989-1993

Senior Account Executive; Account Supervisor

EDUCATION**MBA, KELLOGG SCHOOL OF MANAGEMENT, NORTHWESTERN UNIVERSITY****BACHELOR OF ARTS, DEPAUW UNIVERSITY****COMMUNITY
SERVICE****DUSABLE MUSEUM OF BLACK HISTORY, BOARD OF TRUSTEES****DEPAUW UNIVERSITY, BOARD OF VISITORS****KELLOGG ALUMNI ADVISORY COUNCIL/PETE HENDERSON SOCIETY****TREE HOUSE HUMANE SOCIETY, BOARD OF DIRECTORS**

CAREER HIGHLIGHTS

MARKETING STRATEGY TO SUPPORT MULTI-MILLION DOLLAR FUNDRAISING CAMPAIGNS

- St. Jude Children's Research Hospital ("Thanks and Giving" campaign)
- World Business Chicago (1871/mHub/Current/1K Jobs)

ESTABLISH/BUILD GLOBAL CONSUMER AND B-TO-B BRANDS

- Vyair Medical (breathing solutions)
- Acely/KCI (wound care)
- Get Covered Illinois (Affordable Care Act/health finance)
- EpiPen (Mylan/anaphylaxis)
- Accu-Chek (Roche Diagnostics/diabetes)
- AcrySof ReSTOR (Alcon/multifocal lens)
- OPTI-FREE Replenish (Alcon/contact lens solution)
- Systane (Alcon/dry eye)
- McDonald's (MOCNI/Chicago-area franchisees)
- The Laughing Cow (Bel Brands/cheese)
- Naked (Pepsi/juice)
- Powershares (exchange traded funds)
- Advocate Health Care (Illinois' largest employer and hospital system)

PROTECT/DEFEND GLOBAL BRANDS IN TIMES OF CRISIS

- DuSable Museum of Black History (board departures, rumors of financial problems)
- Vyair Medical (demand for ventilators during the COVID-19 pandemic)
- World Business Chicago (media criticism of WBC funding for Mayor's travel)
- Get Covered Illinois (website failure at launch)
- Heidrick & Struggles (financial performance, executive departures)
- OPTI-FREE Replenish (competitive claims of causing patient blindness in Asia)
- Veolia Environment (L.A. commuter train crash/engineer texting)
- Molex (hostage situation and union protests at Villemur, France plant)
- Advocate Health Care (child dies from bullet wound outside hospital E.R.)

RE-POSITION MAJOR GLOBAL BRANDS

- DuSable Museum of Black History and Education Center (re-position to include education focus)
- World Business Chicago (company attraction/retention to long-term urban economic development)
- Heidrick & Struggles (executive recruitment to Leadership Advisory)

SIGNIFICANT BUSINESS DEVELOPMENT IMPACT

- FleishmanHillard (Led team that won \$36 million "Get Covered Illinois" business)
- Porter Novelli (Drove new business and profitability after major \$18 million fraud loss)

AWARDS AND ACCOLADES

- Two Emmys (Get Covered Illinois/Outstanding Achievement in Public Affairs)
- "Best Integrated Advertising Campaign" (Get Covered Illinois/*Modern Healthcare* and *Ad Age*)
- Chicago "#1 for Corporate Investment" four years in a row (WBC/*Site Selection* magazine)
- Chicago "#1 in foreign direct investment" four years in a row (WBC/IBM Global Location Trends)