Information Services & Technology Committee

Applicants At-A-Glance

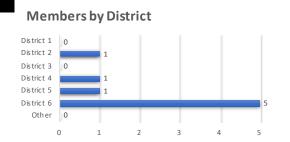
Four (4) Three-year terms expiring February 28, 2027

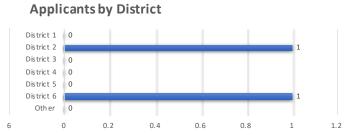
| Name | District | Gender | Ethnicity |
|-----------------|----------|--------|---------------------------|
| Van Leer, Blake | 6 | Male | Caucasian/Non-Hispanic |
| Li, Henan | 2 | Female | Asian or Pacific Islander |

INFORMATION SERVICES & TECHNOLOGY COMMITTEE DEMOGRAPHICS

Districts

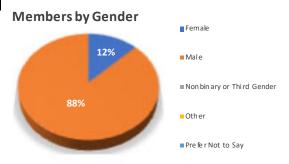
| | Members | Applicants |
|------------|---------|------------|
| District 1 | 0 | 0 |
| District 2 | 1 | 1 |
| District 3 | 0 | 0 |
| District 4 | 1 | 0 |
| District 5 | 1 | 0 |
| District 6 | 5 | 1 |
| Other | 0 | 0 |
| Total | 8 | 2 |
| | | |

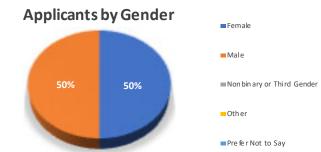




Gender

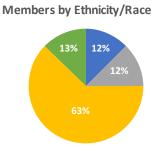
| | Members | Applicants |
|---------------------------|---------|------------|
| Female | 1 | 1 |
| Male | 7 | 1 |
| Nonbinary or Third Gender | 0 | 0 |
| Other | 0 | 0 |
| Prefer Not to Say | 0 | 0 |
| Total | 8 | 2 |



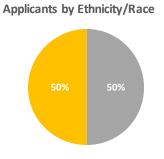


Ethnicity/Race

| | Members | Applican |
|---------------------------------|---------|----------|
| African-American | 1 | 0 |
| American Indian/ Alaskan Native | 0 | 0 |
| Asian or Pacific Islander | 1 | 1 |
| Caucasian/ Non-Hispanic | 5 | 1 |
| Hispanic | 0 | 0 |
| Prefer Not to Say | 1 | 0 |
| Two or More Races | 0 | 0 |
| Other | 0 | 0 |
| Unknown | 0 | 0 |
| Total | 8 | 2 |









Information Services & Technology Committee

Recommendation Statement

Little, Madison S.

From: Council, Julia < Julia. Council@mecklenburgcountync.gov>

Sent: Friday, April 19, 2024 12:41 PM

To: Little, Madison S. **Subject:** ISTAC Vote

Good afternoon Madison and happy Friday!

The ISTAC committee board voted unanimously today to approve the application for Henan Li.

They decided to hold off on the decision for Blake VanLeer, as they wish to allow time for additional districts to apply.

Let me know if you have any questions.



Julia Council
Sr Administrative Support
ITS | Business Operations
Mecklenburg County Government
Office: 980-314-4801 | MeckNC.gov



Advisory Board Application Form Submit Date: Mar 12, 2024 Statement to Applicants Profile Which Boards would you like to apply for?

| Which Boards would | d you like to ap | oply for? | | |
|-------------------------------------|-------------------|-------------------|----------------|--------------|
| Information Services & | Technology Com | mittee: Submitted | | |
| Blake | R | Van Leer lii | | |
| First Name | Middle Initial | Last Name | | |
| What other names names or professio | _ | _ | | |
| BVLIII | | | | |
| blake@myblvd.com | | | | |
| Email Address | | | | |
| 10032 elizabeth crest l | n | | | |
| Home Address | | | | |
| Charlotte | | | NC | 28277 |
| City | | | State | Postal Code |
| Mobile: (202) 525-8717 | , | | | |
| Primary Phone | Alternate Ph | none | | |
| What Mecklenburg | County Distric | t do you live in? | Please verify | below. * |
| ₽ 6 | | | | |
| How long have you months, or years. | been a resider | nt of Mecklenbu | rg County? Plo | ease include |
| 10 | | | | |
| My age range is (pl | ease select on | e): * | | |
| ⊘ 30 to 45 | | | | |
| Ethnicity * | | | | |
| ✓ Caucasian/Non-Hisp | anic | | | |
| Gender * | | | | |
| ✓ Male | | | | |

Interests & Experiences

Education

Purdue BA Information Systems, Minor Business Studies; Georgia Tech MBA Business Candidate

Proto Al, SG Benefit Providers, Kathy Ireland Partner, GM, Advisor, Consultant

Employe

Occupation

Business and civic experience

Experienced technology executive and entrepreneur with the proven track record. My love for technology and business began as a teenager with developing online video games, involving complex data sets, ecosystems, community building, fictional currency, and virtual economics. After college, I started my career with data analytics and product development. Eventually this path led me to working for billion dollar brands and scaling SaaS companies like my current role at Proto AI. On the civic side, I helped launch the "Dream Fearlessly" campaign which involved getting young women along with their mothers interested in tech. On a broad scale we called it the Dream initiative to ensure EVERYONE has the ability and access to make their dreams possible, especially in fields they might have thought impossible. I'm working on helping Charlotte secure an event here with AmFam and Amazon on potential sponsors.

Area of expertise and interests/skills

Information Systems, Product Development, Project Manager, AI, Big Data, Management of backend and frontend technology teams.

Additional Information

If you are or have ever served on a Mecklenburg County board/commission, please answer yes or no. If yes, please disclose the Board and term-end date.

No

Why are you interested in serving on the board(s) to which you are applying?

I am writing to express my interest in serving on the Information Services & Technology Committee for our county. As a resident deeply invested in our community's growth, security and prosperity, I believe I can contribute meaningfully to this committee and assist in driving positive change.

Have you attended a meeting of the advisory board(s) to which you are applying?

○ Yes ⊙ No

Hours Per Month Available for Position

I'm flexible, I recently sold one of my companies and have more available time to dedicate to advising the county.

How did you learn of the vacancy? *

Word of Mouth

Upload a Resume

Disclosure

Are you a Mecklenburg County resident?

⊙ Yes ○ No

Are you a current Mecklenburg County employee? (Mecklenburg County employees are prohibited from serving on any board where appointments are made by the Board of Commissioners. If you are a current, county employee who is to serve in an ex-officio and/or non-voting capacity on any board when required by law, please email clerk@mecknc.gov before submitting an application.)

o Yes o No

Are you a current vendor with Mecklenburg County?

○ Yes ⊙ No

• Do you have any personal or business interest that could create a conflict (either real or perceived) if appointed? If yes, please explain the conflict.

○ Yes ⊙ No

Disclaimer

I, hereby, authorize Mecklenburg County to verify all information included in this application. I certify that I have read the appointment policy and that the information contained in this application is true according to the best of my knowledge and belief. I certify that I am providing my legal name and address in which I reside. I understand that inaccurate or untrue information will be cause for removal from any appointed advisory board. By submitting this application, I agree to adhere to all County policies pertaining to advisory boards, including attendance. I understand if I do not achieve 65% annual attendance, I will be automatically removed from the board or commission to which I am appointed. I understand that this application is subject to the N.C. Public Records Law (NCGS § 132-1) and may be released upon request.

✓ I Agree

Signature of Applicant (Sign Your Legal Name):

Blake R. Van Leer III

Board Specific Questions

Blake Van Leer

Growth Expert with Executive C Level Experience

Charlotte, NC 28277 blake@myblvd.com +1 202 525 8717

Executive and entrepreneur with the proven ability to drive company growth with North Star metrics. Demonstrated ability to Co-Lead and partner with executives, lead GTM strategies, and process to meet growth benchmarks. Some other skills include extensive experience in growth strategies, revenue lift, team building, strategic acquisitions, fundraising, product development, customer retention, brand development, data analytics, ecommerce, Al and stack management.

Willing to relocate: Anywhere

Authorized to work in the US for any employer

Work Experience

EVP, GM and Head of Commerce

Proto AI - Washington, DC April 2021 to Present

Executive Marketing and Sales leader for growth stage B2B SaaS AI company. Responsible for overall GTM vision, strategy, roadmap, and results across marketing and sales functions including sales development (SDR & BDR teams), product development team, demand generation, digital & growth marketing, partnership retention, sales director meetings, product marketing, brand, corporate & content marketing. Also responsible for building out Partnership Programs with new hires and assisting with future funding rounds.

- Created and implemented GTM strategy
- Lead a team across multiple locations, responsible for various functions
- Identifies and implements methods to improve quality, efficiency, and productivity, reduce costs and increase profits
- Recruited CEO, CTO, Engineers, SVPs, BDRs, Managers
- Lead product development, sales, and growth teams
- · Maintained relations with investors with GTM reports and pitches for multiple rounds of funding
- Managed strategy, processes, investment, and optimization across all channels
- · Held weekly leadership and investor meetings with deep analytics and reporting
- Hit numerous benchmarks and assisted CEO with every aspect of the company
- Work closely with in-house Creative and Marketing teams to fuel new ideas related to demand generation

Chief Growth Officer and Special Advisor to Kathy Ireland

kathy ireland Worldwide - Santa Barbara, CA November 2017 to Present

- Blake contributes to numerous board meetings, provides strategic planning directly to Kathy, C-level team and partners.
- Lead product dev teams for multiple verticals.

- Developed and lead GTM teams for new product launches.
- Evaluated and managed tech stack for all ecosystem partners.
- Lead marketing projects from concept creation to execution and evaluation while aligning with kiWW's ecosystem.
- Van Leer helped scale kiWW from \$2B to \$3.1B in sales.
- Blake was responsible for managing the tech stack, digital ads, ecomm stores, multiple ecosystems, business development, leading sales and marketing teams, data driven lift in revenue, SEO strategies, ad buys, sales growth, identifying new sources of revenue, developing new products, technology operations, negotiations and data analytics.
- Blake now works on a case by case basis. As the personal advisor to Kathy Ireland, Blake is frequently called upon to assist with due diligence, to model out potential opportunities for years, build presentations and meet with Kathy's C-Level partners as a liaison e.g. AmFam, NIH, Macys, Amazon, Ebay, Wayfair, Nourison, WNBA, NFLPA, Berkshire Hathaway

Chief Growth Officer

Porter Capital - Charlotte, NC April 2020 to August 2021

Executive Marketing and Sales leader for growth stage B2B SaaS FinTech company.

- Responsible for overall GTM vision, strategy, and roadmap
- Lead marketing and sales functions including sales development (SDR team) demand generation, digital & growth marketing, product marketing, brand, corporate & content marketing.
- Responsible for building out Partnership Programs with new hires, being the first partnership person, and creating a 400% ROI from the program.
- Lead teams at multiple locations with multiple verticals under parent companies Porter Capital and Porter Freight Funding.
- Since leading the teams, Porter experienced its highest revenue-producing year and largest number of clients ever in its 31 years of existence. Porter continues to experience consecutive back-to-back recordbreaking months.

Dream Fearlessly Advisor

American Family Insurance - Portland, OR August 2018 to January 2019

- Assisted American Family and it's volunteers, Amazon and ChickTech in Portland to help 200 mom and daughter duos re-imagine their futures with technology building an Alexa skill, learning video game design and more.
- Blake was brought in last minute to fix a low performance and boost attendance for their Dream Fearlessly campaign.
- Blake quickly created, deployed and managed a successful campaign.
- Through strategic event promotion and amplification, combined with digital and influencer marketing, Blake ensured the event was sold out.
- Additionally, Blake organized onsite and online digital influencers as well as marketing campaigns during the event in order to spread globalawareness inspiring more girls and women in tech to dream fearlessly.

Head of Growth

kathy ireland Health and Wellness - Charlotte, NC November 2017 to November 2018

- Blake began his role as an advisor and would later become the Marketing & Sales Director for a 100+ person marketing and sales division. He was responsible for preparing company with an aggressive growth and marketing strategy and future funding rounds.
- Lead the marketing, B2B sales, ecommerce, social media, email and digital ad teams.
- Lead our teams in visualizing clear accountabilities through further development of KPIs, and overseeing plan into action
- Helped ideate concepts and products. Then lead team's strategy alignment while managing assets, agencies, vendors, events, timelines and budgets.
- Maintain an established budget while improving ROI.
- He and his team developed/managed all material for their roadshow, IPO and numerous multi-million dollar licensing deals; experiential events and onsite management; news interview and event video production; Paid Search, Email Campaigns, press releases; influencer campaigns; SEO; social media SEO, digital ads; social media.
- Blake provided onsite web development, IT setup and management, including Nasdag IT relations.
- After the IPO, he setup sales channels, strategic pricing, ROI lift, team performance on boarding, a sales funnel process, strategies and helped close licensing deals (\$35Million+).
- Maintained company's CRM with up-to-date reports.

Founder/CEO

Padfinders (Acquired) - Washington, DC January 2015 to February 2018

Like most entrepreneurs, Blake wore many hats and applied GTM strategies with a tech background. Blake managed the product, inside and outside sales teams while growing a SaaS business to over 500 apartment buildings (clients) and 32 relocation specialists (SDRs & BDRs).

- He also personally designed a custom CRM, programed data feeds, and managed the front and back in engineer teams.
- Created lead funnel tools. Blake also deployed an SEO strategy that ranked number one for Padfinder's relevant keywords, and managed the Paid Search, video content, Influencer and Event marketing campaigns.
- Blake lead the process for product market fit, platform launch, fundraising and market adoption strategy.
- Lead marketing and sales team to secure over 1,000 b2b clients.
- Leads SEO, Digital Ad and content curation process.
- Created weekly reporting presentations for investors and the executive team.
- Created and maintained high level executive relationships in the multi-family industry.
- Met with multi-family corporate executives regularly to confirm and meet leasing goals.

GTM Advisor

Kure Corp - Charlotte, NC February 2016 to December 2017

• As a consultant, Blake was responsible for advising the brand on their real estate expansion and marketing process. Blake later came on as Head of Growth and assumed a COO/CMO role. He was responsible for growing into 200+ stores, siting, permitting, construction and designing store locations.

- Kure was a Tech and CBD brand and expanded to over 125 stores.
- Kure was a new disruptive brand with government ad restrictions.
- As a solution, Blake helped craft an effective social media strategy and creative online advertisements.
- He directed the real estate division, marketing department and recruited project managers, managed numerous vendors while outperforming budget expectations. Before leaving his advisory role for Kathy Ireland, Kure converted it's negative burn to profitable monthly gain.

Co-Founder

Van Leer Realty - Miami, FL 2010 to 2015

- Commercial & Residential Real Estate Sales and Investments; Consulting for Land Development and Industrial Real Estate Development.
- Blake works alongside family offices and investors scouting, acquiring and permitting commercial and industrial land projects. His expertise is industrial, rail, and warehouse.

Project Management and Marketing Manager

Garnet Inc - Washington, DC January 2002 to January 2010

- Garnet Inc is a construction, engineering and development company.
- At Garnet, Blake project managed for numerous residential, commercial, heavy construction, gas to energy and solid waste projects in Washington, DC, Maryland, Virginia and Atlanta.
- Blake also managed data analytics for population growth, trash volume forecasting and marketing.
- He also assisted with siting, permitting and technology implementation.

Education

Master's in MBA

Georgia Tech

August 2023 to Present

Bachelor's degree in Information Systems, Business Studies

Purdue

August 2002 to May 2004

Transfer, Certificate of Business in Business Administration/Data Analytics

University of Maryland - College Park, MD

August 2000 to May 2002

High school diploma

West Nottingham Academy - Colora, MD

August 1996 to May 2000

Skills

- Marketing
- Data analytics
- Seo
- Brand management
- Team management
- Lead generation
- Metrics
- · Social Media Marketing
- · Google Analytics
- Marketing Strategy
- Al
- Digital Marketing
- Sales Pipeline
- Microsoft Office (10+ years)
- Microsoft Powerpoint (10+ years)
- Management (10+ years)
- Mentoring (10+ years)
- CRM Software
- Social Media Management
- E-Commerce
- PPC Campaign Management
- B2B Sales
- Business Development
- Salesforce
- User Interface (UI)
- Email Marketing
- SEM
- Content Creation
- Web Development
- Application Development
- Google AdWords
- · Content Development
- Outside Sales
- Strategic Planning
- Technology sales (10+ years)
- SaaS
- Accounting (10+ years)

Links

https://myblvd.com/portfolio/

https://www.linkedin.com/in/vanleer

Awards

Commerce Nexty Award

June 2023

Under Blake's leadership, his company won best vendor and took up a "Nexty" during Commerce Next 2023

Certifications and Licenses

Developing Innovative Ideas for New Companies: The First Step in Entrepreneurship

January 2017 to Present

University of Maryland College Park: Developing Innovative Ideas for New Companies: The First Step in Entrepreneurship

Project Management Professional (PMP)

Driver's License

Groups

Advanced Technology Development Center (ATDC)

April 2023 to Present

Mentor and Member

Additional Information

Van Leer is also available as a consultant. He has extensive experience developing and executing GTM strategies and building product dev and growth teams.

In his spare time, write and has written a book about the 1956 Sugar Bowl which was optioned for a major motion picture film.

Statement to Applicants

| Which Boards woul | d you like to apply for? | | |
|---|--|---------------------|----------------------|
| Information Services & | Technology Committee: Subm | iitted | |
| Henan | Li | | |
| First Name | Last Name | | |
| | have you used? (includes, nal monikers) NOTE: If no | | |
| n/a | | | |
| henanli2007@gmail.co _{Email} Address | m | | |
| 3940 Bristol Drive | | | |
| Charlotto | | NC | 20200 |
| Charlotte City | | <u>NC</u> State | 28208 Postal Code |
| ▽ 2 | | e in? Please verify | |
| ☑ 2 How long have you | been a resident of Meckle | | |
| ☑ 2 How long have you months, or years. | | | |
| № 2 How long have you months, or years. | been a resident of Mecklo | | |
| I 2 How long have you months, or years. | been a resident of Mecklo | | |
| ✓ 2 How long have you months, or years. ✓ My age range is (pl ✓ 30 to 45 | been a resident of Mecklo | | |
| ✓ 2 How long have you months, or years. 7 My age range is (pl ✓ 30 to 45 | been a resident of Mecklo | | |
| ✓ 2 How long have you months, or years. 7 My age range is (pl ✓ 30 to 45 Ethnicity * ✓ Asian or Pacific islandary | been a resident of Mecklo | | |
| ✓ 2 How long have you months, or years. 7 My age range is (pl ✓ 30 to 45 Ethnicity * ✓ Asian or Pacific islandary | been a resident of Mecklo | | |
| How long have you months, or years. My age range is (pl 30 to 45 Ethnicity * Asian or Pacific islan Gender * Female | been a resident of Meckle ease select one): * | | |
| How long have you months, or years. 7 My age range is (pl 30 to 45 Ethnicity * Asian or Pacific islander * | been a resident of Meckle ease select one): * | | |

Henan Li

| Alteryx Employer | Consultant Occupation |
|---|---|
| Business and civ | vic experience |
| technology and fina from complex and c on process improve | d experienced data analytics leader with extensive experience in ancial service industry, delivering solutions and extracting deeper insights difficult data • Extensive experience in Digital Transformation, focusing ement, automation and technology enablement strategy • Solid track emplex projects and building strong relationship with stakeholders and ams |
| Area of expertise | e and interests/skills |
| enablement; Self-s | Digital Transformation • Governance / Compliance • Technology ervice technology adoption • Highly skilled in data analytics and data SAS, SQL, R, Alteryx and Tableau |
| Additional Infor | mation |
| | e ever served on a Mecklenburg County board/commission, es or no. If yes, please disclose the Board and term-end date. |
| no | |
| Why are you into | erested in serving on the board(s) to which you are applying? |
| | community leveraging my skills / expertise 2) Have the opportunity to ner leaders in the industry and interchange ideas / experiences |
| Have you attend applying? | led a meeting of the advisory board(s) to which you are |
| ○ Yes ⊙ No | |
| Hours Per Month | n Available for Position |
| 1.5 | |
| How did you lear | rn of the vacancy? * |
| ☑ Word of Mouth | |
| <u>LiHenan_202401.pd</u> Upload a Resume | <u>if</u> |
| Disclosure | |
| Are you a Meckle | enburg County resident? |

⊙ Yes ┌ No

Are you a current Mecklenburg County employee? (Mecklenburg County employees are prohibited from serving on any board where appointments are made by the Board of Commissioners. If you are a current, county employee who is to serve in an ex-officio and/or non-voting capacity on any board when required by law, please email clerk@mecknc.gov before submitting an application.)

O Yes O No

Are you a current vendor with Mecklenburg County?

○ Yes ⊙ No

• Do you have any personal or business interest that could create a conflict (either real or perceived) if appointed? If yes, please explain the conflict.

○ Yes ⊙ No

Disclaimer

I, hereby, authorize Mecklenburg County to verify all information included in this application. I certify that I have read the appointment policy and that the information contained in this application is true according to the best of my knowledge and belief. I certify that I am providing my legal name and address in which I reside. I understand that inaccurate or untrue information will be cause for removal from any appointed advisory board. By submitting this application, I agree to adhere to all County policies pertaining to advisory boards, including attendance. I understand if I do not achieve 65% annual attendance, I will be automatically removed from the board or commission to which I am appointed. I understand that this application is subject to the N.C. Public Records Law (NCGS § 132-1) and may be released upon request.

✓ I Agree

Signature of Applicant (Sign Your Legal Name):

Henan Li

Board Specific Questions

Henan Li

Charlotte, NC 28208 | Tel: 404-984-0795 | Email: henanli2007@gmail.com

SUMMARY

- An innovative and experienced data analytics leader with extensive experience in technology and financial service industry, delivering solutions and extracting deeper insights from complex and difficult data
- Extensive experience in Digital Transformation, focusing on process improvement, automation and technology enablement strategy
- Solid track record of leading complex projects and building strong relationship with stakeholders and crossfunctional teams
- Highly skilled in data analytics and data visualization using SAS, SQL, R, Alteryx and Tableau

PROFESSIONAL SKILLS

Computational Skills: SQL, SAS, R, STATA, Python

Tools: Microsoft Office Suite, Tableau, Alteryx, UiPath (RPA), JIRA, AWS, Azure, GCP, PowerApps, Snowflake

Big Data: Hadoop, Hive

WORK EXPERIENCE

Alteryx Charlotte, NC Resident Consultant 03/2023 - Present

- Act as a trusted advisor and an analytics leader to lead the process to scope and provide post-sales consulting services of Alteryx's entire product suite (on-premises and cloud) across global organizations by working closely with Account Executives, Sales Engineers, Customer Success Managers, and Technical Account Managers
- Help assigned clients on diverse **end-to-end** analytics solutions, including workflow development and optimization, server migration, advanced **data science** and **AI** methodologies
- Build and roll out new professional service offerings in alignment with GTM strategies, focusing on establishing Center of Excellence, Use Case Development, Analytics for All, Governance Assessment and Sox Compliance tailored to individual customer journeys
- Provide tools and upskilling opportunities to promote data literacy and drive adoption of self-service analytics and enable citizen data scientists and analysts to maximize the value of the Alteryx platform
- Work actively with Product Team to evaluate and test AiDIN (new Generative AI capabilities), identify use cases
 and provide feedback to shape the future of the product
- Act as a recognized Subject Matter Expert on governance principles and best practices for the Alteryx platform

Bank of America Merchant Strategy and Analytics

Charlotte, NC 09/2021 - Present

- Work closely with Sales, Operations, Product, and Technology teams to support the **national rollout** of Merchant Service business across US with an average of **\$50B** transactions per month
- Develop tools, analytics, strategies to support the GBAM and Small Business underwriting team and help them deliver for clients, manage risk and drive revenue for the bank
- Manage the processing of Merchant Contingent Risk exposure for all active accounts (89K+) as well as manage
 credit risk and losses, including working with Technology team to perform data quality and push data into
 production
- Develop reports / data visualizations to provide recommendations to senior management on performance goals by determining key performance metrics and conducting trend analysis to deliver insights and decision strategies
- Lead an initiative to identify third-party vendors (Sales and Solution Engineers) that allow the bank to better
 manage merchant-based fraud and cyber risk and build a business case to provide recommendations to senior
 management
- Provide oversight of merchant service vendor models including ongoing monitoring reviews and required action items
- Mentor and train junior team members in business concepts and analytical techniques

Business Strategy & Initiative Manager, Enterprise Operational Excellence

01/2018 - 09/2021

- Led a team of analysts to implement Operational Excellence throughout the Finance / CAO organization across
 People, Process and Technology dimensions, focusing on defining reporting and analytics needs and architecting
 an optimal solution using Business Intelligence Tools (Tableau/Alteryx/Workiva/Uipath/SQL/SharePoint)
- Worked with stakeholders, cross-functional teams and process re-engineering teams to analyze current state
 processes, identify and prioritize automation opportunities, build use cases, create prototypes and implemented 40process improvements as a result of Operational Excellence
- Worked with Technology (Center of Excellence) and third-party vendors (Account Executives, Customer Success Managers, Solution Engineers) to build enablement strategy and showcase the implementation of data and analytics tools to drive user adoption (increase users by 300%) and increase collective knowledge of new technologies through blogs, quarterly innovation live sessions and trainings
- Worked as a Product Owner to lead a \$1M technology project and worked closely with business partners and Technology to develop the Enterprise Simplify and Improve platform (~500 users) with new reporting capabilities using agile methods (JIRA) resulting in saving 3 FTE hours, 25% reduction in data fields and better user experience
- Led the team to design and develop an executive **Tableau** dashboard to analyze the performance of over **800** Real Estate Capital projects worth ~**\$2B**, including project key metrics (**KPIs**), project risk profile and cost information
- Led an initiative to drive a culture of change across **Finance** and **CAO** and accelerate the adoption of self-service business intelligence tools, with **600** participants, **220** projects submitted and **50,000** capacity savings

Quantitative Finance Analyst

09/2015 - 12/2017

- Developed quantitative/qualitative models across Global Markets and Equities business to perform revenue and balance sheet **forecasting** (**SAS**, **R**) for financial planning and conduct scenario analysis for internal risk measurement as well as external regulatory submission (CCAR, DFAST)
- Developed a web-based tool (R Shiny) to support revenue/balance sheet forecast review process, provide in-dept analysis of results, automate business review presentations, and enable business to make more informed decision
- Conducted Ongoing Monitoring of **model performance** including back-testing, sensitivity and attribution analysis ar optimized this process for all models in **R**, shortening the report generation time from **3 days per model to 1 day**
- Led discussion to interpret forecast results, recent portfolio trends and potential market impacts to various key stakeholders, including line of businesses, BFOs, FP&A, Model Risk Management and other business partners

DeloitteAtlanta, GAData Analytics Associate07/2013 – 09/2015

- Built, tested and launched a web-based claims processing system to reconcile ~1.5 billion claims for the largest bankruptcy filing in US history
- Performed fraud analytics by developing complex SQL scripts to help identify fraudulent financial transactions across multiple countries in one of the largest Foreign Corrupt Practices Act (FCPA) investigations
- Responsible for loading, cleansing, validating and analyzing revenue data across various platforms in SQL and
 Tableau to evaluate a pre-employment screening firm's financial health in a mergers & acquisitions engagement

EDUCATION

| Georgia Institute of Technology | | Atlanta, GA |
|---|---------------|-------------|
| Master of Science in Economics/Statistics | GPA: 4.0/4.0 | 2011 - 2013 |
| Jilin University | | Changchun, |
| China | | |
| Bachelor of Management in E-commerce | GPA: 88.2/100 | 2007 - 2011 |
| | OTHERS | |

Certifications: SAS Base Certificate, Alteryx, Tableau Author, AWS, Azure, GCP

Language: English, Mandarin, Cantonese

Hobby: Tennis, Coffee, Travel

Information Services & Technology Committee

Board Details

The Information Services & Technology Committee serves as an advisory group to the Board of County Commissioners and reviews plans at a conceptual level for major new automated systems with respect to justification of the system; adequacy of the system functions; appropriateness of the technical approach; availability of technology and personnel resources; to advise on how business as a whole is accomplishing or approaching challenges; and, to provide feedback to the Board when necessary on ITS challenges.

| Overvi | ew | | | |
|--------|-------------------------|--|--|--|
| Size 1 | 2 Seats | | | |
| Term L | ength 3 Year | | | |
| Term L | Limit 2 Terms | | | |
| Contac | t Keri Carver | | | |
| _ | | | | |
| Phone | (980) 314-2152 | | | |

Additional

Qualifications

Members should have expertise in managing Information Systems. Persons serving must be a resident of Mecklenburg County. Appointed members must attend a minimum of 65% of all scheduled meetings in a calendar year and cannot miss three consecutive meetings. Failure to comply with attendance requirements will result in removal from the advisory board.

Advisory Board Details

The Committee validates the processes associated with implementation of automation plans including those used in the selection of equipment and service vendors. While performing these duties, the Committee provides appropriate coordination with any existing advisory bodies that may also have interest in the planned systems. The Committee reviews the plans of the ITS Department, of major automation projects and periodically reports to the Board of County Commissioners as to the same if necessary.

Meeting Dates/Times

Monthly - 3rd Friday at 7:30 a.m.

Meeting Location

Valerie C. Woodard Center - 3205 Freedom Dr., Charlotte, NC 28208, Suite 107

Time Commitment

1.5 hour for 10 out of 12 months

Stipend

No

Special Notes

Job Description

Information Services & Technology Committee

Board Roster

Andrew Blake

1st Term Sep 19, 2023 - Feb 28, 2027

Email andrew.blake@gmail.com

Home Phone Mobile: (980) 245-0020 Alternate Phone Home: (704) 644-8877

Address 2200 Hogan Ct Charlotte, NC 28270 **Appointing Authority BOCC**

Travis Burgess

2nd Term Mar 01, 2021 - Feb 28, 2027

Email buryor@aol.com

Home Phone Mobile: (704) 618-7139 **Alternate Phone** Home: (704) 501-7260

Address

11939 Canter Dr Mint Hill, NC 28227 **Appointing Authority BOCC**

Perry Chapman

1st Term Feb 16, 2022 - Feb 28, 2025

Email pchapman339@gmail.com **Home Phone** Mobile: (704) 953-7155

Address

5824 Mantario Dr Charlotte, NC 28269 **Appointing Authority BOCC**

Johnathan Gorke

1st Term Feb 16, 2022 - Feb 28, 2025

Email gorke@me.com

Home Phone Home: (612) 987-1673

Address

3904 Cambridge Hill Ln Charlotte, NC 28270 Appointing Authority BOCC

Kevin B Hutchinson

1st Term Sep 19, 2023 - Feb 28, 2026

Email kbhutch@outlook.com

Home Phone Mobile: (704) 340-6463

Address

10302 Auburn Top Ln Charlotte, NC 28277 **Appointing Authority BOCC**

Stacey Jenkins

1st Term Feb 21, 2023 - Feb 28, 2027

Email stacey.jenkins@gmail.com **Home Phone** Mobile: (980) 253-7552

Address

618 King Edward Road Charlotte, NC 28211 **Appointing Authority BOCC**

Shvetketu Pandya

Partial Term Sep 19, 2023 - Feb 28, 2025

Email shvetketupandya@yahoo.com **Home Phone** Home: (704) 588-7488 **Alternate Phone** Mobile: (980) 272-8716

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13128 Arrington Heights Pl. Charlotte, NC 28278

Appointing Authority BOCC

Terrence Ziemniak

1st Term Feb 21, 2024 - Feb 28, 2025

Email tmziemniak@yahoo.com
Home Phone Home: (312) 339-8293

Address

625 Barington Pl Matthews, NC 28105 **Appointing Authority BOCC**

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