

Wildcat MicroFund Business Support Coordinator (RFQ)



Prepared for: Mr. Mack McDonald

Prepared by: Mr. Ryan Hopkins MBA
Principal Consultant

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Description

This proposal has been prepared in response to the Wildcat MicroFund Program's need for start-up and small business technical assistance services.

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SECTION 1: EXECUTIVE SUMMARY

Blackbridge Consulting Inc. proposes to serve as the Wildcat MicroFund Business Support Coordinator for San Juan County, providing coordination, outreach, and hands-on business technical assistance to entrepreneurs and early-stage businesses throughout the County in partnership with Weber State University and regional stakeholders.

The engagement will be led by Ryan Hopkins, MBA, Founder and Principal Consultant of Blackbridge Consulting Inc., who brings nearly two decades of experience in financial planning and analysis, financial operations, and small business technical assistance. Mr. Hopkins has led publicly funded business support initiatives, cohort-based programs, and small business navigator engagements serving under-resourced and minority-owned entrepreneurs. Through this engagement, he will provide direct one-on-one technical assistance, facilitate community-based workshops, coordinate with local partners, and manage all reporting and documentation requirements.

Blackbridge's relevant experience includes delivery of the Fairfax County Latino Economic Development Corporation's THRIVE Small Business Development Program, the Feed the Soul Foundation's national cohort-based technical assistance program, and the City of Dublin, California Small Business Navigator Program. Across these engagements, Blackbridge has supported more than 129 small businesses through individualized advising, business plan development, financial forecasting, capital readiness preparation, and structured reporting to public-sector sponsors.

For San Juan County, Blackbridge will deliver services through a community-centered, facilitation-led approach designed to expand equitable access to capital and entrepreneurial education across rural and Indigenous communities. Services will include in-person and remote one-on-one technical assistance; delivery of Business Model Canvas training, Lean Business Plan workshops, and targeted marketing-focused training; outreach and partner coordination; and structured tracking of participation and business outcomes. Session topics and technical assistance activities will be tailored to local entrepreneur's needs while remaining aligned with Wildcat MicroFund objectives.

Services will be delivered over the initial contract year using a structured, milestone-based work plan that ensures consistent engagement, measurable outcomes, and timely monthly reporting to the County. Blackbridge maintains the operational systems and quality controls necessary to track participation, document activities, and support grant reporting expectations.

Blackbridge proposes a total not-to-exceed cost of \$30,000 for the first year of services. This reflects a lean, senior-led delivery model that prioritizes direct entrepreneur support, practical training, and accountable coordination while remaining aligned with County budget parameters. The proposed price includes all labor, outreach, facilitation, documentation, and reporting required to successfully support the Wildcat MicroFund initiative.

SECTION 2: RELEVANT QUALIFICATIONS AND EXPERIENCE

2.1 Firm History and Qualifications

Blackbridge Consulting Inc. is a management and financial consulting firm specializing in the design and delivery of small business development, capacity-building, and technical assistance programs for public-sector agencies, economic development organizations, and community-based partners. The firm focuses on providing structured, practical, and implementation-oriented support to small, local, and emerging businesses, particularly those operating in rural and underserved communities.

Blackbridge Consulting was established to address persistent barriers faced by early-stage entrepreneurs, including limited access to capital, incomplete business planning, underdeveloped financial systems, and lack of coordinated support services. Through hands-on technical assistance and community-based training, the firm helps entrepreneurs strengthen business models, improve financial readiness, and access funding and growth opportunities.

Since its founding, Blackbridge Consulting has supported publicly funded small business technical assistance programs across multiple jurisdictions, working with municipalities, counties, nonprofit intermediaries, and grant-funded initiatives to improve business sustainability and long-term viability. While the firm brings deep expertise in financial analysis and planning, its technical assistance model is intentionally multidisciplinary, integrating financial, operational, and management support to meet entrepreneurs where they are in their development lifecycle.

Experience Delivering Small Business Technical Assistance

Blackbridge Consulting has extensive experience designing and administering individualized and cohort-based technical assistance programs tailored to early-stage and small businesses participating in publicly funded entrepreneurship initiatives. These programs commonly include:

- Entrepreneur intake and readiness assessments to identify capacity gaps
- Development of customized technical assistance work plans
- One-on-one coaching focused on business modeling, financial management, and funding readiness
- Group workshops addressing core business development topics
- Performance tracking and outcomes reporting aligned with grant and public funding requirements

The firm has delivered services under federally funded, state-funded, and municipally funded programs, including initiatives supported by ARPA and other economic development funding sources. Blackbridge Consulting has served as both a prime technical assistance provider and a delivery partner supporting broader economic development strategies administered by public agencies and nonprofit organizations.

Breadth of Technical Assistance Services

Blackbridge Consulting's technical assistance services are designed to support entrepreneurs throughout their startup and early-growth lifecycle. Core service areas include:

- **Business Readiness and Planning:** Business Model development, Lean Business Plan preparation, and operational readiness assessments
- **Financial Management:** Bookkeeping cleanup, financial reporting, budgeting, forecasting, and cash flow analysis
- **Capital and Funding Readiness:** Loan and grant preparation, financial documentation, and application support
- **Operational Support:** Process improvement, internal controls, and documentation practices
- **Marketing and Customer Development:** Customer segmentation, outreach strategy, and market positioning
- **Performance Tracking:** Establishment of participation metrics, milestone tracking, and outcomes reporting

This integrated approach allows Blackbridge Consulting to provide practical, actionable support that aligns with the expectations of public-sector sponsors and funding partners while remaining accessible to rural and underserved entrepreneurs.

Public-Sector Program Delivery & Reporting Experience

Blackbridge Consulting operates within public accountability frameworks and understands the importance of transparency, documentation, and measurable outcomes. The firm routinely supports program administrators with:

- Monthly, quarterly, and annual reporting
- Participant tracking and service documentation
- Data integrity and audit-ready recordkeeping
- Continuous improvement based on performance metrics and stakeholder feedback

This experience enables Blackbridge Consulting to serve as a reliable partner to San Juan County by delivering high-quality technical assistance services without creating additional administrative burden for County staff.

Organizational Capacity

Blackbridge Consulting maintains a flexible, lean delivery model designed to support personalized technical assistance and community-based programming. Engagements are led by senior-level consultants and supported by standardized tools and reporting systems that ensure consistency, accountability, and service continuity.

This structure allows the firm to provide hands-on support to entrepreneurs while remaining responsive to changing program needs and local priorities.

Commitment to Inclusive Economic Development

At its core, Blackbridge Consulting is committed to advancing inclusive economic development by strengthening the capacity of rural, Indigenous, and underserved entrepreneurs to participate meaningfully in local and regional economies. The firm's experience working with community-based organizations, nonprofit intermediaries, and public agencies positions it to effectively support initiatives such as the Wildcat MicroFund.

Through culturally responsive engagement, practical technical assistance, and disciplined program management, Blackbridge Consulting helps ensure that entrepreneurs across diverse communities have access to the tools, knowledge, and resources needed for sustainable growth.

2.2 Relevant Experience

Fairfax County Latino Economic Development Corporation (LEDC) – THRIVE Small Business Development Program (April 2024 – March 2025)

Blackbridge served as a technical assistance provider under this ARPA-funded program delivering virtual, one-on-one financial technical assistance to small businesses in Fairfax County, Virginia. The team delivered more than 1,200 hours of individualized support, including needs assessments, scoped workplans, accounting record development and reconciliation, financial analysis and forecasting, loan documentation review, business valuation support, and development of financial presentations and reports. Blackbridge regularly reported outcomes to LEDC and supported program monitoring and accountability. The program primarily served very small, underrepresented businesses, many of which lacked formal accounting systems and were led by women and entrepreneurs of color.

Feed the Soul Foundation – Small Business Development Program (June 2021 – December 2024)

Blackbridge has supported this national, grant-funded cohort-based technical assistance program since 2021, providing structured financial advisory services to restaurant-based small businesses across the United States. Each annual cohort includes approximately 30 businesses receiving \$10,000 in technical assistance services. Across multiple cohorts, Blackbridge has supported 89 businesses through virtual one-on-one advising, financial analysis and forecasting, accounting system development, loan readiness support, business valuation analysis, and financial strategy development. The engagement also included designing and delivering group-based virtual classes and peer-learning workshops, as well as preparing program reports for the Foundation.

City of Dublin, California – Small Business Navigator Program (April 2023 – Present)

Blackbridge provides ongoing technical assistance services to small businesses in the City of Dublin through the City's Small Business Navigator Program. Services include development of scoped workplans, financial analysis and forecasting, business plan development, market research, preparation of financial presentations, and reporting. The program supports very small local businesses, many of which operate with limited internal capacity, and requires close coordination with municipal economic development staff to ensure alignment with City objectives and consistent service delivery.

2.3 Key Personnel

Ryan Hopkins, MBA – Principal Consultant / Technical Assistance Lead

Ryan Hopkins will serve as the Program Director and Principal Consultant for the Wildcat MicroFund Business Support Program, providing overall leadership, strategic oversight, and quality assurance. Mr. Hopkins will serve as the primary point of contact with San Juan County and will be responsible for ensuring that all program activities are delivered in accordance with the Scope of Services, approved work plans, and performance expectations.

In this role, Mr. Hopkins will oversee program implementation, coordinate with County staff, the San Juan Chamber, Weber State University partners, and community organizations, and ensure that training, technical assistance, and reporting activities align with the County's economic development and entrepreneurship objectives. He will monitor program performance, address implementation risks, and guide continuous improvement efforts to ensure measurable and sustainable outcomes for participating entrepreneurs and small businesses.

Qualifications Snapshot

- **Education:** Master of Business Administration (MBA) in Corporate Finance & Business Management; Bachelor of Science in Economics
- **Years of Relevant Experience:** 15+ years in financial consulting, program leadership, and public-sector small business technical assistance
- **Relevant Expertise:** Program design and management; small business capacity-building; financial analysis and forecasting; capital readiness; performance monitoring; stakeholder coordination
- **Public-Sector Experience:** Led and supported publicly funded technical assistance and entrepreneurship programs for municipal and county agencies and public-sector-funded nonprofit organizations
- **Professional Affiliations:** Association of Finance Professionals; American Economic Association; Institute of Management Consultants USA

Dr. Victoria Okotie, DBA, MBA, Senior Technical Assistance Consultant

Dr. Victoria Okotie will serve as a Senior Technical Assistance Consultant for the Wildcat MicroFund Business Support Program, providing advanced one-on-one business advisory services and supporting group-based training activities for participating entrepreneurs and early-stage businesses. In this role, Dr. Okotie will focus on strengthening business readiness, financial management, and capital access through hands-on coaching and applied technical assistance.

Dr. Okotie will support entrepreneur intake and readiness assessments, deliver individualized technical assistance sessions, and contribute to Business Model Canvas, Lean Business Plan, and capital readiness workshops. She will work closely with the Program Director and technical assistance team to address complex business challenges, support funding application preparation, and ensure consistent, high-quality service delivery aligned with Wildcat MicroFund objectives.

In addition to direct advisory services, Dr. Okotie will leverage her background in data analytics and performance management to help entrepreneurs improve recordkeeping practices, financial documentation, and outcome tracking. This integrated approach will strengthen both day-to-day business operations and long-term funding readiness.

Qualifications Snapshot

- **Education:** Doctor of Business Administration (DBA); Master of Science in Data Science; Master of Business Administration (MBA); Bachelor of Science in Chemical Engineering
- **Years of Relevant Experience:** 15+ years of experience in business advisory services, data analytics, financial management, and performance improvement across public and private sectors
- **Relevant Expertise:** Business planning and analysis; financial management; capital readiness; performance measurement; documentation systems; training facilitation
- **Public-Sector / Program Experience:** Led and supported publicly funded entrepreneurship and technical assistance initiatives for state and local government agencies and nonprofit organizations
- **Leadership & Advisory Experience:** Founder and CEO of a consulting firm providing business, technology, and strategic advisory services to public-sector and regulated-industry clients

Luis Gabriel Cruz Andrada – Technical Assistance Consultant

Luis Andrada will serve as a Technical Assistance Consultant for the Wildcat MicroFund Business Support Program, providing direct one-on-one business technical assistance and supporting group-based training activities for participating entrepreneurs and early-stage businesses. In this role, Mr. Andrada will focus on hands-on delivery of financial, operational, and business planning guidance to strengthen business readiness, sustainability, and informed decision-making.

Mr. Andrada will support entrepreneur intake and readiness assessments, deliver individualized technical assistance sessions, and assist with workshops related to budgeting, forecasting, financial reporting, business model development, and capital readiness. He will work under the direction of the Program Director and in coordination with County partners and community organizations to ensure timely, consistent, and well-documented service delivery aligned with Wildcat MicroFund program objectives.

Qualifications Snapshot

- **Education:** Bachelor of Science in Business Administration, Concentration in General Management (Cum Laude)
- **Years of Relevant Experience:** 8+ years of experience in financial analysis, budgeting, forecasting, and small business advisory support
- **Relevant Expertise:** Financial planning and analysis; budgeting and forecasting; financial reporting; loan and grant readiness; client-facing advisory services

- **Public-Sector / Institutional Experience:** Extensive experience supporting publicly accountable environments, including management of large-scale budgets and compliance-driven financial reporting
- **Technical Skills:** Advanced proficiency in Microsoft Office; experience with QuickBooks, SAP, Cognos, Tableau, and related financial and analytical systems

Kamesha Penn, MBA – Program Coordinator / Administrative Lead

Kamesha Penn will serve as the Program Coordinator / Administrative Lead for the Wildcat MicroFund Business Support Program, providing day-to-day operational coordination and administrative support to ensure smooth, efficient, and responsive program delivery. In this role, Ms. Penn will support scheduling, entrepreneur communications, documentation management, and internal coordination across the project team and County partners.

Ms. Penn will manage entrepreneur intake logistics, coordinate one-on-one technical assistance sessions and community-based workshops, and track participation, milestones, and deliverables. She will work closely with the Program Director, technical assistance staff, and County and partner organizations to ensure timely service delivery, accurate recordkeeping, and consistent communication with program participants and stakeholders throughout San Juan County.

Qualifications Snapshot

- **Education:** Master of Business Administration (MBA); Bachelor of Science in Business Administration
- **Years of Relevant Experience:** 10+ years of experience in financial analysis, program support, and operational coordination
- **Relevant Expertise:** Program coordination; scheduling and logistics; financial and operational reporting; entrepreneur and client communications; data tracking and reconciliation
- **Public-Sector / Program Experience:** Supported publicly funded small business technical assistance initiatives, including work with the Feed the Soul Foundation and the LEDC THRIVE Program
- **Technical Skills:** Advanced proficiency in Microsoft Excel and Office Suite; experience with QuickBooks, Zoho Analytics, Wave, and other financial reporting tools

SECTION 3: PRICING PROPOSAL

Blackbridge Consulting Inc. proposes a transparent and cost-effective pricing structure that reflects a lean, senior-led delivery model and aligns with OBDD’s budget parameters. Pricing is designed to ensure continuity, accountability, and high-quality facilitation while efficiently supporting program coordination and reporting throughout the contract term ending June 30, 2027.

The proposed price includes all labor, planning, outreach, training delivery, technical assistance, documentation, coordination, and reporting required to provide in-person and remote one-on-one business support; deliver Business Model Canvas, Lean Business Plan, and marketing-focused trainings; coordinate with San Juan County, the San Juan Chamber, and Weber State University partners; and prepare required monthly activity summaries and invoices. No additional costs are anticipated beyond the proposed price.

Cost Category	Description	Rate	Estimated Hours	Extended Cost
Consulting & Technical Assistance Services	One-on-one business coaching, Business Model Canvas and Lean Business Plan training, capital readiness support, outreach, partner coordination, and workshop delivery	\$150/Hour	160	\$24,000
Administrative, Documentation & Reporting Support	Intake processing, scheduling, participation tracking, data management, monthly reporting, invoicing, and documentation management	\$75/Hour	80	\$6,000

Total Proposed Cost: Not to Exceed \$30,000

Value to San Juan County is delivered through a lean, senior-led service model that prioritizes direct entrepreneur support while maintaining strong accountability and compliance. Blackbridge Consulting’s approach minimizes administrative overhead by integrating outreach, service delivery, and reporting functions and leveraging virtual and community-based delivery formats

where appropriate. Program resources will be actively monitored to ensure adherence to budget parameters while maintaining high-quality, responsive service to participating businesses.

SECTION 5: INDEPENDENT CONTRACTOR COMPLIANCE

Blackbridge Consulting Inc. confirms its status as an independent contractor and will perform all services in that capacity. The firm maintains required insurance coverage and assumes full responsibility for all applicable taxes, regulatory compliance, and indemnification obligations in accordance with County requirements.

Ryan Hopkins

Desoto, Texas
214-458-9052 · ryanhopkins9@gmail.com

PERFORMANCE SUMMARY

FP&A Leader and Senior Manager with 10+ years of experience driving budgeting, forecasting, long-range planning, and executive decision support across complex and mature environments. Proven expertise in corporate financial modeling (P&L and cash flow), cloud and IT cost management, and cross-functional business partnering. Trusted advisor to executive leadership, known for building scalable financial models, strengthening reporting rigor, and translating complex data into actionable insights.

CORE COMPETENCIES

P&L Ownership
Profitability Analysis
Budgeting

Forecasting & Long-Range Planning
Variance Analysis & Cost Optimization
Executive & Business Partnering

Financial
Scenario Modeling
Data-Driven Financial Reporting

PROFESSIONAL EXPERIENCE

Blackbridge Consulting **Principal Consultant**

Apr. 2022 - Present

- Lead FP&A ownership across multiple client organizations, including annual budgeting, rolling forecasts, and long-range financial planning.
- Own and maintain integrated financial models supporting P&L and cash flow planning and strategic initiatives.
- Partner directly with C-suite and senior leaders to deliver executive-level insights supporting growth, margin optimization, and investment decisions.
- Design scalable FP&A reporting packages and dashboards improving visibility into performance drivers, KPIs, and forecast accuracy.
- Lead financial process improvements and systems implementations to support scalable, high-quality reporting.

Sabre Technology **Senior Financial Analyst**

Jan. 2017 - Apr. 2022

- Led budgeting, forecasting, and financial analysis for large-scale IT vendor portfolios, supporting executive decision-making through trend analysis, variance explanations, and cost optimization insights.
- Served as the financial subject matter expert for a multi-year cloud migration initiative, partnering with IT, procurement, and senior leadership to evaluate cost efficiency, ROI, and long-term financial impact.
- Developed and maintained vendor expense and forecasting models to improve visibility into spend patterns, accruals, and future cost drivers across a complex vendor environment.
- Managed financial oversight for a \$230M accounts payable portfolio, ensuring accurate forecasting, disciplined expense management, and timely reporting to leadership.
- Drove process improvements across vendor expense cycles, reducing invoice approval and payment timelines from 60 days to 14 days while strengthening financial controls and reporting accuracy.
- Identified and supported \$1.8M in cost savings through detailed expense analysis, variance investigation, and mitigation strategies in collaboration with cross-functional partners.

Animal Supply Company **Senior Financial Analyst**

Oct. 2015 - Jun. 2016

- Held full P&L ownership for the business unit, leading annual budgeting, forecasting, and ongoing financial performance management to support operational and strategic decision-making.
- Produced financial and KPI reporting packages for leadership, delivering clear insights into revenue, cost drivers, margin performance, and operating trends.
- Conducted variance and trend analysis, investigating drivers of performance deviations and partnering with business leaders to support corrective actions and improved results.
- Implemented Hyperion Essbase to enhance financial forecasting, streamline reporting processes, and improve data accuracy and consistency.
- Led financial process improvement initiatives, coordinating with corporate finance and cross-functional stakeholders to strengthen controls, reporting quality, and operational efficiency.

Accent Care**Jul. 2015 - Oct. 2015****Financial Analyst**

- Supported corporate budgeting, forecasting, and financial reporting, providing variance analysis and ad-hoc financial insights to inform management decision-making.
- Performed commission and incentive compensation analysis, ensuring accurate calculation, approval, and alignment with business performance.
- Delivered financial decision support to senior management and cross-functional teams across Finance, Sales, Operations, and Contracts.
- Utilized Hyperion Essbase to support the annual budgeting process, including development of financial models and reporting outputs.

Gibson Energy**Jul. 2014 - Jul. 2015****Regional Financial Analyst**

- Supported regional operations finance through monthly financial reconciliations, station-level cost-tracking, and volume and throughput analysis, providing visibility into key operational and financial drivers.
- Prepared and presented monthly accruals and variance analysis to support accurate month-end close and inform operational and finance leadership.
- Led the migration of invoicing and settlement data from Microsoft Excel to the proprietary TMW system, improving data integrity, reporting accuracy, and scalability of financial processes.
- Automated invoicing and settlement analysis procedures, reducing manual effort, minimizing errors, and improving the timeliness of financial reporting.
- Provided day-to-day leadership and oversight to a team of four data analysts and one revenue analyst, ensuring consistency, accuracy, and quality in financial reporting and analysis.

Additional Experience**Sept. 2008 - Jun. 2014****Insurance & Financial Services – Early Career Roles**

- Progressed through multiple roles supporting financial analysis, reporting, and operational decision support within regulated insurance and financial services environments.
- Developed a strong foundation in data analysis, controls, and cross-functional collaboration, contributing to accurate reporting and informed business decisions

EDUCATION**Master of Business Administration (MBA)**

University of Dallas — Irving, TX
 Concentration: Corporate Finance & Business Management

Bachelor of Science in Economics

Southern Methodist University
 Specialization: Financial Applications

TECHNICAL SKILLS**Financial Planning & Analysis**

- FP&A, Corporate Budgeting, Forecasting, and Accruals
- Variance, Trend & Root Cause Analysis

Financial Modeling & Decision Support

- Financial Modeling & Scenario Analysis
- Executive Financial Reporting

- Spending & Contract Evaluation

Systems, Tools & Analytics

- Hyperion Essbase, Smart View, NetSuite
- Advanced Excel, Tableau, Access, PowerPoint

Process & Performance Improvement

- Financial Process Improvements
- Reporting Optimization & Automation

Dr. Victoria Okotie

Houston, Texas | 832-692-0356 | kmg@kevinmitchgroup.com | www.kevinmitchgroup.com

Experience

2021 – Present	Chief Executive Officer	Kevin Mitch Group
2023 – Present	Adjunct Faculty: Business Analytics	University of Houston-Victoria
2022 – 2023	Adjunct Faculty: Business Analytics	Southern New Hampshire University
2017 – 2021	Global Subsurface Learning Advisor	BP
2014 – 2017	Senior Petroleum Engineer	BP
2013 – 2014	Performance Analyst	BP
2004 – 2013	Petroleum/Reservoir Engineer	BP

Professional Summary

Dynamic, strategic, and innovative leader with extensive global experience. Drives performance by translating complex challenges into pragmatic solutions in rapidly changing environments. Trusted by stakeholders to integrate diverse perspectives to deliver sustainable business value. A critical leader in identifying and executing opportunities utilizing data-driven analytics to improve business decisions and performance. Passionate about driving innovation and building strategic partnerships with clients and vendors. Leverages a unique blend of technical, digital, agile, business, communication, analytical, empathetic and leadership skills.

Business Delivery Expertise

Business Analytics | Strategy Planning | Digital Transformation | C-Suite Communication | Cybersecurity | Leadership | Technical Consulting | Agile Methodologies | Design Thinking | Performance Management | Project Management | Machine Learning | Entrepreneurship | Data Science | Researcher | Author

Education

Doctor of Business Administration (DBA), 2024 | Strategic Leadership and Innovation |
Chicago Concordia University (Doctoral Dissertation: Quantitative study on Leadership in Energy)

Master of Science, Data Science, 2021 | Texas Tech University | Rawls School of Business

Master of Business Administration (MBA), 2020 | Quantic School of Business and Technology

Bachelor of Science, Chemical Engineering, 2003 | Colorado School of Mines

Certifications

Enterprise Design Thinking Practitioner, 2019 | IBM

Professional Scrum Product Owner (PSPO), 2019 | Scrum.org

Professional Scrum Master (PSM), 2019 | Scrum Alliance

Professional Experience Summary

- Providing clients with technology solutions to accelerate business growth, identify emerging opportunities, leverage operational efficiencies, and extract insights with robust decisions.
- Cultivating strategic client relationships and partnerships underpinned with delivery of key business needs with measurable impact, outcome prediction and bottom-line value.
- Achieved 120+% increase in performance metrics (net promoter score, learning effectiveness, faculty performance) through integration of learner feedback for continuous improvement of learning offers
- Doubled global offerings year-on-year. Introduced data analytics and visualization tools to transform data into insights with business value.
- Developing technical excellence through quality delivery of learning offers consistent with business expectations. Oversight of Global Subsurface professionals and external faculty
- Incorporation of data analytics in performance management and annual demand planning processes
- Stakeholder influence and engagement planning across global teams and leadership
- Created innovative solutions for process improvement through data quality, dashboards, workflow, and process simplification
- Single point accountability for BP CEO global portfolio weekly production reporting
- Production performance reporting for BP Executive Leadership team
- In-depth variance analysis for BP production, adjusting for production sharing agreements, divestments, merger, and acquisition activities in bi-quarterly external Financial reports
- Accurate production data analysis and insight for investor presentation and corporate reports
- Coached users on performance management system for near term production forecasting worldwide across multi-disciplines
- Provided support to Upstream Global Reservoir Development performance management teams
- Forecasted short term production and scorecard tracking for monthly financial reporting
- Built integrated asset models to sense check development options and long-term production forecast
- Introduced and deployed new data management tool (Digital Well-file) to Business unit

Data Analytics Skills

- Script Languages: R, Python (Scipy, Numpy, Pandas, TensorFlow, PyTorch, Seaborn, Matplotlib)
- Database fundamentals, queries, and data mining (MySQL, NoSQL, ETL, Lucidchart, HTML, CSS)
- Machine Learning and Deep Learning Algorithms (Predictive analytics, Clustering, Classifications, Boosting, Dimensionality reduction, Decision trees, Naïve Bayes, Neural Networks, Random Forest, Support Vector Machine (SVM), Principal Component Analysis (PCA), Linear Regression, Logistics Regression, Multidimensional Scaling (MDS), K-Means (KNN), CART, NLP, Computer Vision, etc.
- Statistics, Probability and Regression Analysis (Time Series, Multivariate analysis, Econometrics)
- Business Intelligence: Data Visualization and Analytics (Tableau, Power BI, Spotfire, PowerApps)
- Data trends, patterns, and anomaly detection (structured and unstructured data sets)
- Data Science Toolkit: Anaconda, Spyder, Jupyter, Microsoft Azure, Pentaho, RStudio, Amazon Sagemaker
- PROSPER, GAP, MBAL, CMG (Builder, Result, GEM, CMOST), PIE, DSS, Open Wells, PEEP, Fekete CBM & RTA, Visual Basic, Palantir, Microsoft Azure DevOps, AutoCAD, Crystal Ball, Polymath, Petra, Rod-star, MS Word, Excel, Access, PowerPoint, Project, Sway, Teams, OFM

Technical Publications & Awards

- Doctoral Research Dissertation: "Closing the Leadership Gap - A Quantitative Study of Gender and Race in Energy"
- "Paradigm Shift in Carbonate Stimulation Unlocks Significant Prize" – BP/ADNOC CEO Award
- "Multiphase Flow Meter Performance: A Critical Piece of an Offshore Well Management Toolkit" (SPE 183055) – published in the *Society of Petroleum Engineers (SPE) Journal*
- "Multi Zone Completion Design Optimization in Offshore Prolific Carbonate Reservoirs: A Systematic Approach" (SPE-188311)
- "Successful Management in New Offshore Field Startup: Meeting Challenging Targets and Exceeding Expectations" (SPE 177745)
- "Prudhoe Bay Study of Horizontal Well Injectivity and Recommended Approach to Achieving Long Term Efficient Water flooding" (IPTC 11508)
- "Well Production Challenges and Solutions in a Mature, Very Low-Pressure Coalbed Methane Reservoir" (SPE 137317) *Cedric K. Ferguson Medal Nominee*

QUALIFICATIONS

- Strong analytical skills; support operations through analysis and attention to details
- Excellent verbal and written communication skills
- Ability to provide excellent customer service to individuals at all levels of an organization
- Rapidly adapt to new technologies and skilled in using Microsoft Office; Google Docs; ADP; Workday; SAP; Quali Financial System; Cognos Business Intelligence; Jaggaer E-Market; QuickBooks; WordPress; Student Information System; Python; Tableau; RapidMiner; TARA; STRATA; Canva

WORK EXPERIENCE

Consultant June 2023 – Present
Blackbridge Consulting

- Financial Planning & Analysis Consultant responsible for financial analysis, forecasting and presenting to clients.

Budget Analyst February 2020 — May 2023
Health Systems Marketing and Communications
Keck Medicine of USC, Los Angeles CA

- In charge of fiscal management of \$20 million marketing and business development project funding.
- Process invoices, purchase orders, reimbursements, and contract requests.
- Reconcile account balances and activity to the hospital general ledger.
- Maintain and analyze the current fiscal status for 7 project divisions.
- Monitor YTD actual expenses and develop projections for anticipated projects.
- Month-end, year-end closing, financial report preparation, and budget development.

Business Technician January 2014 – February 2020
Administrative Budget Assistant April 2013 – January 2014
Department of Molecular Microbiology and Immunology
Keck School of Medicine of University of Southern California, Los Angeles CA

- Gathers, organizes and records data for financial analysis
- Assisted in preparation of budget requests including budget amendments
- Creates and audits financial reports and manages financial database
- Financial analysis on federal and private sponsored grants
- Provides advice and guidance on budget related issues
- Processes reimbursements, procurement, and billing support
- Manages equipment inventory and service contracts
- Manages the administrative operations for the Master's Program in Molecular Microbiology and Immunology

EDUCATION

Bachelor's in Business Administration,
Concentration in General Management, GPA 3.7
California State University of East Bay
Cum Laude

Study Abroad Experience

- Accounting, University of Santo Tomas, Philippines

KAMESHA PENN

Mesquite, TX
214.412.4243
Kpenn2006@att.net

OBJECTIVE

Detail-oriented and analytical professional seeking a Revenue/ Financial Analyst position where I can apply my expertise in financial modeling, data analysis, and revenue forecasting to support strategic decision-making and drive business growth. Eager to contribute to a dynamic organization by leveraging strong proficiency in Excel, and financial reporting tools.

SKILLS

Financial Reporting

Forecasting

QuickBooks

Customer Service

TMW

Pak Energy

VAS

Zoho Analytics

Wave Apps

Microsoft Office (Advanced in Excel, Word, and PowerPoint)

EXPERIENCE

Revenue Consultant | Independent Contractor

2020-Present

- Analyzed and interpreted large volumes of revenue and operational data to crude oil and refined product transport to identify trends, discrepancies, and optimization opportunities.
- Prepared and reconciled complex settlement statements and customer invoices, ensuring accuracy and compliance with contractual terms.
- Generated and maintained financial and operational reports using Zoho Analytics, Pak Energy, and VAS, streamlining performance insights and revenue forecasting.
- Partnered with cross-functional teams (accounting, logistics, operations) to ensure end-to-end process integrity from shipment data capture through to final revenue recognition.
- Led initiatives to improve data workflows and automate reporting processes, resulting in reduced turnaround time and increased reporting accuracy.
- Ensured timely month-end and year-end close processes in alignment with company policies and regulatory requirements.

Financial Consultant | Independent Contractor

2023-Present

- Supporting small business development programs through impactful TA projects, including Feed the Soul Foundation and LEDC Thrive Program.
- Background in financial analysis with a focus on driving operational efficiency and sustainable growth
- Assisted and educated small businesses in using QuickBooks and understanding financial reporting, improving their ability to manage finances and making informed decisions.

Revenue Analyst | Meridian Transport

2019-2020

- Prepared and recorded monthly revenue transactions associated with the transport of oil.
 - Reduced invoicing errors for the largest customer by 45%, by doing a Root Cause Analysis to determine what actions needed to be taken to correct the issues.
 - Worked with marketing team to ensure contracts for customers were accurate and executed for invoicing.
 - Reconciled customer account balances and retrieved payments for past due balances.
 - Worked with Director of IT to streamline processes within Well Trax, to help invoice customers and settle drivers quicker and more efficiently.
-

- Filed various state revenue and volumetric reports.

Revenue Analyst | Gibson Energy

2014-2019

- Prepared and recorded monthly revenue transactions associated with the transport of oil.
- Reduced invoicing errors for all customers by 30%, by ensuring the information was current in the database.
- Recovered over \$100k for underpaid invoices from customers, by analyzing data and communicating with the customers.
- Worked with marketing and finance teams to ensure all contracts were up to date and executed for invoicing.
- Prepared month end close process, which included variance analysis of actual revenue versus accruals and account reconciliations, and presented it to senior management.
- Assisted with forecasting the company's quarterly budget
- Helped spearhead process improvement projects to help with more accurate reporting, invoicing, and settlements.

EDUCATION

MBA | Kaplan University

July 2016

**Bachelor of Science in Business Administration
Kaplan University**

October 2013



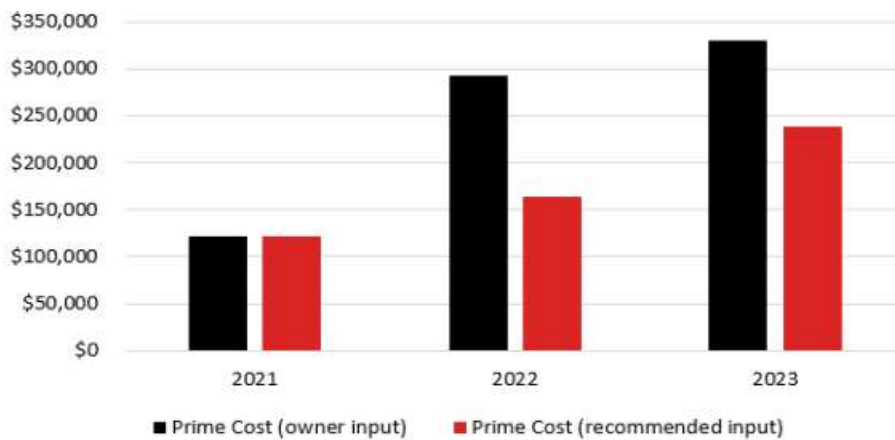
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Prime Cost as a Percentage of Sales

By increasing staff at the rate, we recommend, your Prime Cost decreases by 14% in 2022 and by 8% in 2023. Your average year over year decrease is 8%. RevPASQFT increases by \$75 in 2022 and \$174.72 in 2023 for average year over year growth of 58%. This is a significant increase in comparison to your current performance as well as your project performance with your inputs. RevPASH increases by \$2.99 in 2022 and \$4.72 in 2023, again for an average increase of 58%. By increasing headcount at a slower rate over the next 12-18 months, the positive impact from revenue growth can be captured in your net income.

	2021	2022	2023
Prime Cost (owner input)	\$121,221	\$292,352	\$330,133
Prime Cost (recommended input)	\$121,221	\$164,097	\$238,198

Prime Cost Comparison





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Financial Statement Findings

Income Statement

Your net profit improved \$54,946 from (\$117,334) in 2019 to (\$62,389) in 2020 and through seven months of 2021 (YTD Jul 2021) that trend continues as you have now crossed over into the black, showing a \$761 profit. Year over year revenue growth outpaced increases in COGS and operating expenses (mainly salaries & wages and variable expenses) driving profit gains from 2019 to 2020 despite Covid-19 impacts. COGS, salaries & wages, and variable cost are the most impactful cost categories and maintaining a tight handle on these costs is imperative.

Balance Sheet

Your balance sheet is strong, and the net worth of your business has continued to grow over the past time 2.5 years (period shown above). We used liquidity and solvency ratios to gauge the stability of your balance sheet. To get a sense of where your business stands from a liquidity point of view, we used the current ratio and for solvency we used the debt ratio and the debt-to-equity ratio.

Debt Ratio (total debts / total assets) at year end 2019 was 0.48 and trending in the right direction. As of July 2021 it was 0.40. A debt ratio greater than 1.0 means you have more debt than assets, while one less than 1.0 indicates that you have more assets than debts.

Debt-to-Equity Ratio (total liabilities / equity) measures your businesses financial leverage or level of risk from a lending institution's perspective. Your Debt-to-Equity Ratio was 0.46 at year end 2019 and has improved to 0.28 in July 2021 as your equity has grown faster than your liabilities. This means that you have \$0.28 of debt for every \$1.00 of equity and lenders would consider your business a low risk and would be more likely to approve for funding.



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Understanding Financial Statements

- Importance of financial literacy in business management
- Overview of income statements, balance sheets, and cash flow statements
- How to interpret financial data specific to the towing industry





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Receivables Turnover Ratio

Receivables Turnover Ratio = Net Credit Sales / Average Accounts Receivable

$$\text{Receivables Turnover Ratio} = \frac{\text{Net Credit Sales}}{\text{Average Accounts Receivable}}$$



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Receivables Turnover Ratio

Receivables Turnover Ratio Example

Let's say a towing company has the following:

- **Net Credit Sales:** \$120,000 for the year
- **Accounts Receivable at the beginning of the year:** \$15,000
- **Accounts Receivable at the end of the year:** \$25,000

First, calculate the **Average Accounts Receivable:**

Average Accounts Receivable = (Beginning Accounts Receivable + Ending Accounts Receivable) / 2

Average Accounts Receivable = (\$15,000 + \$25,000) / 2 = \$20,000

Now, use the Receivables Turnover Ratio formula:

Receivables Turnover Ratio = \$120,000 / \$20,000 = 6



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Techniques for Accelerating Receivables

Invoicing	Pay Option	Short Term	Early Pay	Automate	Partial Pay	Engage	Factoring	Follow Up	Track
Implement Prompt and Clear Invoicing	Offer Multiple Payment Options	Set Clear and Short Payment Terms	Offer Early Payment Discounts	Automate Payment Reminders	Negotiate Upfront or Partial Payments	Maintain Strong Relationships with Clients	Use Invoice Factoring	Follow Up on Overdue Invoices Quickly	Track and Manage Receivables Regularly



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Managing Capital Expenditures

Planning

Planning for major purchases (e.g., tow trucks, equipment)

Financing

Financing vs. leasing: Making the best decision for your business



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Sample Current vs Previous Year Comparison

Current vs Previous Year Dashboard

Revenue - 2020

205,326

67.5% vs previous year

Gross Margin - 2020

101,589

139.2% vs previous year

EBITDA - 2020

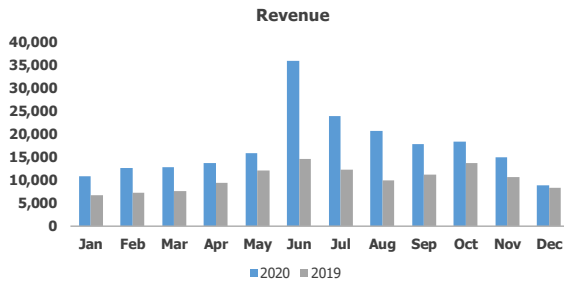
-58,306

-40.7% vs previous year

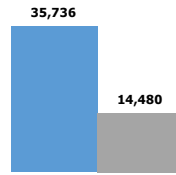
Net Profit - 2020

-62,389

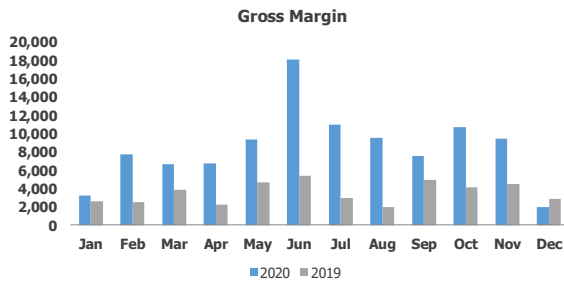
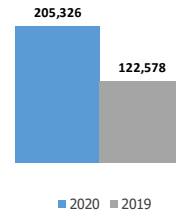
-46.8% vs previous year



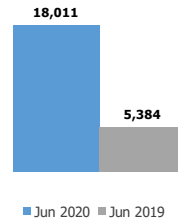
Revenue (Month)



Revenue (Year)



Gross Margin (Month)



Gross Margin (Year)

