

Qualifications Summary

A senior level professional with 20+ years of experience and demonstrated proficiency in the areas of:

- ✓ Evaluation and financial analysis of projects and programs
- ✓ Statistical & econometric analysis
- ✓ Development and implementation of financial and operational measurement and tracking systems
- ✓ Financial modeling, forecasting & reporting
- ✓ Competitive intelligence & benchmarking
- ✓ Development of utility revenue requirements, cost of service and tariff design
- ✓ Process coordination, mapping & analysis
- ✓ Development and delivery of reports and presentations
- ✓ Proficient in Microsoft Office
- ✓ Management & supervision

Financial Forecasting & Analysis

- ✓ Financial forecasting and project analysis for Grenada Electricity Service, Ltd (GRENLEC) and Dominica Electric Services, Inc. (DOMLEC). The primary focus of the work is development of strategic/financial analysis and forecasting models or the evaluation of geothermal, solar and wind power options and how to strategically integrate these options into the current and future regulatory paradigms.
- ✓ Project finance analysis using excel to fine-tune and prioritize independent power projects and secure financing from lenders for various independent and renewable power projects with Tampa Electric & Carbon Resources of Florida as well as coal mining projects with Carbon Resources of Florida; packaging and presentation of results to management and lenders.
- ✓ Preparation and presentation of an annual strategic analysis that served as the primary resource document in annual planning process for New York State Electric & Gas Corporation; the analysis included a base financial forecast with key sensitivities, a detailed benchmarking analysis of the company against its regional peers utilizing a detailed statistical and econometric analysis of FERC Form I data, an assessment of year to date progress on all key operational priorities and financial goals, a regulatory risk assessment as well as an industry issues analysis.
- ✓ Development and company wide implementation of a capital project analysis tool for New York State Electric & Gas Corporation; the tool was utilized to screen and prioritize the projects to be included in the company's annual capital budget
- ✓ Developed econometric & engineering based end-use electric forecasting models which were utilized for strategic planning as well as the planning and evaluation of DSM programs at Orange & Rockland Utilities and New York State Electric & Gas Corporation.
- ✓ Development of an econometric model of the total US long-distance telecommunications market; the model's ability to measure both total market and carrier specific price elasticity by service offering over time proved instrumental in AT&T securing price cap regulation from the Federal Communications Commission.
- ✓ Development of the pricing framework and in the field sales tools for a luxury home-builder in the Sarasota/Ft. Myers/Naples Florida markets.
- ✓ Development of costing and pricing analysis tools to establish retail pricing strategies for service and equipment offerings for over 500 HVAC, Plumbing and Electrical companies.

Utility Regulation & Ratemaking

- ✓ Served as the primary consultant for the Grand Bahama Port Authority in its role of the regulator of the Grand Bahama Power Company (GBPC). Duties include the critical review of GBPC tariff filings, formulation of GBPA responses and positions, working with both GBPA/GBPC to reach final resolution of outstanding issues and ongoing review of GBPC operations and finances between tariff filings. Reached successful resolution and approval of the GBPC filed rate plan with new rates effective 2/1/2016.
- ✓ Development of revenue requirement, cost of capital, cost of service and tariff design models utilized by DOMLEC, Inc. (the electric utility on the Island of Dominica) in its deliberations with the World Bank and development of tariff filings with the Dominica Independent Regulatory Commission.
- ✓ Development of an excel based model to determine rate base, capital structure, cost of capital, net operating income and general revenue requirements for Progress Energy Florida; the model produced the requisite Minimum Filing Requirements for the company's 2009 general rate case.
- ✓ Coordination of the discovery process for the Progress Energy Florida 2009 General Rate Case for over 900 requests relating to rate base, capital structure and cost of capital.
- ✓ Support the Progress Energy Florida wholesale marketing function with embedded and marginal cost analysis of prospective contracts; complete the required cost support with each executed contract that is filed with the Federal Energy Regulatory Commission.
- ✓ Developed and secured regulatory approval of an electric tariff for New York State Electric & Gas Corporation to keep seasonal customers from switching to diesel based self-generation; filed the tariff with and secured approval from the New York State Public Service Commission.
- ✓ Participated in a US-AID consulting project for electric power stations in the restructuring nations of Poland and Lithuania; prepared and delivered presentations on strategic and financial planning, budgeting and capital project analysis.
- ✓ Management of an 8 person department responsible for evaluation and regulatory filings for Demand Side Management at New York State Electric & Gas Corporation including the successful recovery of a 75 basis point regulatory incentive for successful program implementation.

Budgeting & Reporting

- ✓ Completed monthly reporting and in depth analysis of Direct Energy's \$12 Million retail HVAC/Plumbing and Electrical home services division for Executive Management.
- ✓ Constructed excel based budgeting templates used by over 500 HVAC, Plumbing and Electric service companies in the United States and Canada affiliated with Clockwork Home Services (now Direct Energy, Inc.). Completed a national rollout and training of 12 franchise business consultants. In addition to a financial budget, the models establish the key marketing, sales and operational outcomes consistent with those results which drive the key daily priorities for each of these companies.
- ✓ Developed excel based daily tracking and reporting systems utilized by over 500 HVAC, Plumbing and Electric companies affiliated with Clockwork Home Services (now Direct Energy, Inc.); also designed a complementary template and process for the daily consolidation and management reporting for 30 company owned stores
- ✓ Developed monthly reporting and variance analysis packages for the Cable Networks Division of Acterna Corporation; the excel based model extracted data from the Great Plains Accounting System as well as excel based budgeting tools to provide management a versatile menu driven tool to review results across and number of key dimensions (e.g. product, department, region)

Coordination & Management

- ✓ Provided consulting to 30-40 Air Conditioning & Heating, Plumbing and Electrician franchises in the areas of marketing, pricing, human resources, operations, sales and financial management.
- ✓ Participated on the team coordinating the divestiture of over \$1 Billion of electric generation assets; activities included financial modeling, program planning, regulatory coordination, due diligence and bid evaluation. All assets were sold in excess of book value and provided the cornerstone for New York State Electric & Gas Corporations subsequent acquisitions that transformed the company into Energy East and its eventual acquisition by Iberdola.
- ✓ General management of a \$5 million / 25 employee HVAC company in Nashville, TN
- ✓ Managed all of the accounting and cash/banking activities for a \$10 Million portfolio of coal mining and marketing companies while the Vice President of Finance at Carbon Resources of Florida.

Work History

Apr 2004 - Present	Vinhage & Associates , Bradenton, FL (Independent Consultant)
July 2010 – April 2011	Direct Energy (fka Clockwork Home Services) , Sarasota, FL (Mgr. Finance)
Jan 2009 – July 2010	Progress Energy , St. Petersburg, FL (Sr. Regulatory Specialist)
Jul 2006 - Jan 2009	Clockwork Home Services , Sarasota, FL (Mgr. Financial Planning & Analysis)
Sep 2005 - Jul 2006	Carbon Resources of Florida , Bradenton, FL (VP Finance)
Dec 2004 - Sep 2005	Clockwork Home Services , Sarasota, FL (Franchise Business Consultant)
Mar 2002 - Apr 2004	Progress Energy , St. Petersburg, FL (Lead Financial Analyst)
Nov 2000 - Mar 2002	Acterna Corporation , Bradenton, FL (Sr. Financial Analyst)
Apr 1999 - Nov 2000	TECO Energy , Tampa, FL (Mgr. Financial Planning & Analysis)
Jan 1989 - Apr 1999	New York State Electric & Gas , Binghamton, NY (Mgr. Strategic Planning)
Jan 1988 - Jan 1989	Orange & Rockland Utilities , Pearl River, NY (Economic Analyst)
Jun 1986 - Jan 1988	AT&T Communications , Bedminster, NJ (Sr. Market Specialist)

Education

MA, Economics, 1986 / ABD, 1991
BA, Economics, 1984

SUNY Binghamton, Binghamton, NY
West Chester University, West Chester, PA