

# BARBARA GUTIERREZ, CPA, CGMA

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## FINANCE AND OPERATIONS EXECUTIVE

### CHIEF FINANCIAL OFFICER | CHIEF PEOPLE OFFICER | SENIOR VICE PRESIDENT OF FINANCE SENIOR VICE PRESIDENT OF CORPORATE SERVICES

Driver of strategy and sustained results in emerging and entrepreneurial organizations

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**PROFILE:** Progressive executive leader, operational strategist, and trusted advisor with over 30 years of broad financial and operational experience in directing and improving the financial operations of public, private equity and privately-held companies. Transformational leadership abilities and demonstrated success with entrepreneurial, high growth companies, and in streamlining business operations that drive growth and improve efficiency and profitability.

**Leadership · Acquisitions & Integration · Compliance & Controls · Strategic Planning & Execution  
Infrastructure Development · Financial Planning & Analysis · Legal and Contracts · Change Management  
Sales Operations · Team Development · Capital Transactions · Entrepreneurial Growth · Human Capital Management**

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## BOARD ROLES AND AFFILIATIONS

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<b>University of Denver School of Accountancy</b> , Advisory Board and Alumni Relations Committee	2013 to present
<b>InnovAge</b> , Compliance, Investment, and Information Security Committees, Staff to Audit Committee	2017 to present
<b>Strad Energy Services (TSX: SDY)</b> , Corporate Secretary, Board and Committee Staff	2011 to 2016
<b>Jones International University</b> , Board member, Audit Committee Staff	1998 to 2011
<b>Jones Knowledge Group</b> , Audit and Executive Committee Staff	1998 to 2011
<b>Camp Fire of Colorado</b> , Board member and Finance Committee	1996 to 2000

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## SELECT EXECUTIVE LEADERSHIP ACHIEVEMENTS AND HIGHLIGHTS

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- **Emergent leadership in driving and managing high growth companies** for scalability and profitability.
- **Lead role in acquisitions and joint venture transactions**, leading to 45+% company growth.
- **Executive leader for strategic acquisition and integration** for public company leading to 23% growth in market capitalization.
- **Key player in executing complex capital transactions** and working with lenders and equity holders.
- **Corporate Secretary and advisor to the Board** on class action litigation, risk management and liaison with TSX.
- **Key player in \$100+M Initial Public Offering** working with underwriters, counsel, auditors, and strategists.
- **Established Project Management Office in two organizations**, to manage and streamline resources and improve efficiency and success of organizational initiatives
- **Selected as Executive Sponsor** for North American strategic initiatives to improve **Sales Effectiveness and Operations Training**.
- **Lead company-wide system implementation** that replaced three legacy systems and yielded a 20+% gain in operational efficiencies.
- **Recipient of the Medallion of the Alliance award**; CEO honor for extraordinary demonstration of corporate value bestowed upon only two people in 10 years.

# BARBARA GUTIERREZ | Resume

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## PROFESSIONAL EXPERIENCE

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### **InnovAge**

*Largest Program of All-Inclusive Care for the Elderly (PACE) in the nation operating sixteen locations in five states. InnovAge is a full-risk, integrated care delivery system for seniors, with services ranging from primary and specialty care, transportation, social engagement, home care, and facility care. The mission of InnovAge is to allow seniors to live life on their terms – by aging in place, in their own homes and communities, for as long as safely possible.*

#### **Chief Financial Officer**

**2017 - present**

Recruited to lead high growth (45% y/y) company with organic, acquisition, and denovo growth streams. Responsible for financial and regulatory compliance for the organization. Play a key role in corporate development and strategy, deal structure, and integration. Transacted two complex restructurings of credit facility and executed dividend distributions to shareholders within one year. Executive sponsor for automation and scalability for several cross-functional systems. Serve as trustee for 401(k) and 409 (a) plans, and member of the Cyber Security governing committee. Work directly with Board and Audit, Compliance and Executive Committees of the Board.

### **HERO DVO, LLC**

*Leading practice management group focused on delivering the systems, processes, people and patient support to efficiently deliver quality dental, vision and orthodontic care to children in underserved communities. With dozens of offices nationwide, over a million children ages six months through 20 years have gained access to the care they need.*

#### **Chief Financial Officer and Chief People Services Officer**

**2016 – 2017**

Recruited by Private Equity group to develop a professionally-managed firm. During 6-month CEO transition, partnered with Chief Operations Officer to develop, implement, and manage company growth strategy. Implemented data warehouse to enable data-driven decision making. Launched eLearning platform for institutionalizing training and development.

### **STRAD ENERGY SERVICES, Ltd.**

**2011 - 2016**

*Leading provider of energy solutions and services to the North American oil and gas industry; product manufacturer for internal and external customers; publicly-traded Canadian-based company (TSX: SDY); Operations span several regions in Canada and the US with multiple product lines.*

#### **Corporate Executive and Senior Vice President of Corporate Services for North America**

**2014 - 2016**

Promoted to Corporate Secretary (TSX) and SVP of Corporate Services and for North America. Responsible for Human Resources, Information Technology, Legal/Contracts/Risk Management, Fleet and Facilities, Business Systems and Services for North America. Lead Executive on strategic acquisition, driving 23% growth in market cap.

#### **SVP of Finance and Administration for US Operations**

**2011 - 2014**

Member of Executive Team and co-leader of US Operations. Recruited to Strad as part of Executive succession plan. Transformed accounting and finance team to manage high-growth operations and public company requirements. Managed operational and financial growth resulting in record company results for 2014. Led organizational restructuring and consolidation increasing EBITDA margins by 100%.

### **JONES KNOWLEDGE GROUP**

**2001 - 2011**

*Internationally recognized as a pioneer in the fusion of education and communications; delivers education and training solutions via its subsidiaries focused in online postsecondary education, technical training, software development and professional services.*

#### **Chief Financial Officer and Senior Vice President**

Integral member of the senior executive team, Board of Directors, and Audit Committee. Prepared robust business plans, financial analysis, and requisite documents for business development activities including organic expansion, mergers and acquisitions, and external financing transactions. Managed and reduced operating cash requirements by 80% by implementing key operational metrics. Established centralized Project Management Office resulting in consolidated project management resources across all business units. Key business partner to sales and marketing via management of Sales Operations function.

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## QUOVADX

1999 - 2000

*A publicly traded company and leading provider of integrated business solutions for the healthcare industry. Formerly Xcare.net, Inc. and currently owned by Lawson Software.*

### Corporate Controller

Key member of \$100m+ Initial Public Offering team. Transitioned the company from private to public status. Provided technical expertise on software revenue recognition matters and worked extensively with sales, legal counsel and clients on contract negotiations.

## PHYCOR OF DENVER / FRONT RANGE MEDICAL MANAGEMENT

1994- 1999

*Subsidiary of publicly traded company, providing management services to physicians and other third parties.*

### Executive Director and Vice President

Promoted upon restructuring of business operations; led company in transition to a medical services organization. Coordinated contract dissolution between PhyCor and Focus Health Services, LLC; structured transactions with individual physician practices. Developed and negotiated billing services contracts with individual physician practices.

### Chief Financial Officer

Recruited to the executive team to position the company for growth. Oversaw significant expansion through acquisitions and organic growth of physician group from 20 to 100+ over a two year period. Managed financing transaction of \$70+M. Achieved 100% increase in revenue by developing and negotiating a third-party billing contract. Initiated the development of a reimbursement division. Directed information services in the implementation of a decision support system, data warehouse and enhancements to information systems and technologies.

## OTHER RELEVANT EXPERIENCE

**HEALTHONE** - Financial Manager, Presbyterian/St. Luke's Medical Center and Spalding Rehabilitation Hospital; Controller, Spalding Rehabilitation Hospital; Assistant Controller, Swedish Medical Center

**DELOITTE & TOUCHE** – Senior Auditor

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## EDUCATION

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Bachelor of Science – Accounting (Magna cum Laude)

University of Denver, Denver, CO

Continuing Professional Education for AICPA and CO CPA Licensure

Women's Leadership Foundation 2019/2020 Boardbound Program

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## PROFESSIONAL CERTIFICATIONS & MEMBERSHIPS

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- Certified Public Accountant (CO)
- Colorado Society of CPAs
- American Institute of CPAs
- Chartered Global Management Accountant
- Financial Executives International (FEI)
- Several Professional Organizations
- Community volunteer
- Littleton Hospital Volunteer