

## **OVERVIEW**

Patty Cruz has over 20 years in the energy industry with specialties in utility organizational effectiveness, due diligence and project management. Her expertise includes the following areas:

- Strategic planning
- Business transformation and performance improvement
- Communication planning and stakeholder engagement
- Change management
- Cultural evolution
- Process road-mapping
- Leadership development and teambuilding
- Due diligence for power resources and electric transmission projects

Ms. Cruz helps clients achieve higher levels of performance and business transformation by evaluating the organization's: alignment with its strategic plan, leadership, corporate structure and culture. She works with utilities to define their strategic direction and implemented action plans to achieve their purpose or vision.

Ms. Cruz also works with utility executives to enhance leadership skills and develop teams to: lead the organization through workforce issues, face industry challenges, conduct process redesign efforts to adapt to new technologies, and develop effective internal and external communication strategies.

She assists in due diligence assessments associated with financings, development or equity investments in power resources and electric transmission projects.

Ms. Cruz is fluent in both English and Spanish and has participated as a client interface, facilitator, and translator on multiple domestic and international Spanish language assignments. She is regularly invited to speak at state and national industry conferences on topics related to her areas of expertise.

## **PROJECT EXPERIENCE**

### ***Strategic Planning***

Ms. Cruz facilitated the planning process for various electric, water, wastewater, natural gas, and telecommunication utilities. The process included: (1) interviewing key internal and external stakeholders to obtain their input on the utility's current situation and desired future state; (2) identifying and training the core planning team who will be held accountable in developing and implementing the strategic plan; (3) facilitating workshops to define strategic and tactical elements; and (4) producing a multi-year strategic plan supported by annual tactical action plans. Additionally, she facilitated workshops with advisory teams composed of members of governing bodies and stakeholders to obtain their input throughout the planning process and endorsement of the final plan.

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### ***Business Transformation***

Ms. Cruz conducted organizational audits primarily for utilities. These assessments included reviewing the structure of the organization, functional areas and processes, staffing levels, and talent management practices. Frequently, projects also included performance benchmarking of the utility against similar organizations and best practices assessment.

Based on results, Ms. Cruz designed alternate organizational structures based on the utility's needs, identified appropriate spans of control, determined staffing levels and developed recommendations to achieve higher levels of performance.

### ***Communication Planning and Stakeholder Engagement***

Ms. Cruz led public involvement efforts for various utilities. Projects involved developing communication plans that identify stakeholders, defining core messaging for diverse media, facilitating workshops with internal and external groups, monitoring the media, and developing educational materials related to the topics being addressed. The objective of these projects was to develop comprehensive strategies to guide communications consistently, collect input from employees and/or the community, and obtain endorsement for the utilities' efforts.

### ***Change Management***

Ms. Cruz assisted clients with managing change (new technologies, structures, strategic plans) that impact key processes across the organization and helping employees understand, endorse and adapt to the new situation. She defined strategies to lead the change management efforts, including communication strategies, and interactive and educational sessions with employees to develop messaging, identify channels, and develop materials. As a result, employees were provided with the information and educational materials to understand the new situation, implications of the change, how the company planned to adapt, and how their support contributed to the success of the company in adapting to that change.

### ***Cultural Evolution***

The successful implementation of new initiatives is significantly impacted by the culture of the utility. Ms. Cruz used tools to quantify and measure the corporate culture, defined core values, and developed and implemented plans to drive organizational change. Once the cultural assessment was completed, results were analyzed, and recommendations were defined. These efforts delivered a clear picture and supporting information about the limiting and positive factors in the culture, providing the platform for a cultural paradigm shift that leads to improved performance and productivity.

### ***Process Road-mapping***

Ms. Cruz assisted clients in the review and mapping of existing processes to identify redundancies, improvement opportunities, define necessary resources, schedules and deliverables. Once the current situation was understood, she worked with key employees to refine/design the functional processes so that they were in alignment with previously defined objectives, connected to new technologies, to achieve higher levels of productivity and enable cost savings.

### ***Leadership Development and Teambuilding***

Ms. Cruz is a certified Birkman Method consultant and has worked with executive, management and supervisory teams at various utilities. The Birkman method is based on an online assessment that provides

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insights into personality traits that are used as a foundation to further enhance leadership skills, career development, and teambuilding opportunities. Additional efforts included working one-on-one with utility personnel to facilitate leadership development.

### ***Due Diligence for Power Resource and Electric Transmission Projects***

Ms. Cruz assisted in due diligence assessments associated with financing or equity in power resource and electric transmission projects by reviewing project documents such as System Impact Studies, Facilities Studies, Interconnection Agreements and Power Purchase Agreements, and other contractual and legal documents (e.g., tariffs, market rules), to identify potential liabilities and risks that the project would bear. Developed reports describing these liabilities and risks, and describing the analysis performed to quantify those risks and liabilities.

## ***PROFESSIONAL HISTORY***

Ms. Cruz began her career with Human Services International, a management consulting firm located in Santiago, Chile, where she worked with financial institutions to improve the levels of service provided to customers. In 1999, she joined R.W. Beck, a highly regarded, international management consulting firm of approximately 500 employees. Ms. Cruz continued work as a management consultant under SAIC, who purchased R. W. Beck, and eventually transitioned to Leidos. In 2018, she joined Hometown Connections as VP of Consulting and Training prior to joining nFront Consulting LLC.

## ***EDUCATIONAL AND PERSONAL***

Ms. Cruz's educational background includes a Master of Business Administration in Management from the University of Tennessee, a Master of Science in Human Resource Management from the Catholic University in Chile, and a Bachelor of Science in Communication from the Javeriana University in Colombia. She also is a Certified Birkman Consultant, a Cultural Transformation Tools Consultant, and Facilitator.