

# Resume of Joseph L. Lewis

## Senior Manager, WSR Consulting Group, LLC

Joseph L. Lewis, a Senior Manager at *WSR Consulting Group, LLC* and the founder of Lewis & Co., has over 28 years of business and IT consulting experience. His expertise encompasses project management, systems analysis, business planning, business restructuring, expert analysis on business and accounting issues. His IT consulting and accounting experience and expertise has focused on numerous industries, including higher education, real estate investment, manufacturing, wholesale, distribution and financial service corporations.

Mr. Lewis' clients have included: The Walt Disney Company; California Institute of Technology; the California State University system; UCLA; Northrop; Litton; Mission Insurance Company; Great Western Life Insurance Company; and several privately-held companies.

### AREAS OF EXPERTISE

Mr. Lewis' projects and clients have included:

- **California State University - Office of the Chancellor ("CSU")** - Served as Project Manager for the planning and design of PeopleSoft Financial Applications. The project consisted of planning for the design and implementation of selected PeopleSoft Financial Applications throughout the twenty-three campuses within CSU. Subsequent to the planning phase of the project, Mr. Lewis managed the requirements definition/prototyping phase of the project to define the financial application design, configuration and data conversion processes to be used during implementation. Throughout the project, Microsoft Project software was used to plan, manage and report on progress. Mr. Lewis also directed a team to evaluate e-Procurement options available for the CSU & recommended the strategic approach to be followed by CSU.
- **California Institute of Technology ("Caltech")** - Over the period of three years, Mr. Lewis managed and directly participated in several projects at Caltech including:
  - The development & documentation of internal accounting control procedures in many financial areas.
  - The review and analysis of Caltech's endowment spending rule.
  - The computation of Caltech's historical yield on the endowment assets.
  - The documentation of existing business processes in the accounting areas.
  - The redesign of the business processes in the accounting areas.
  - The development of the structure of the new Chart of Accounts to be implemented in the Oracle Financial Applications.
  - The management of the year-end closing of Caltech's general ledger and the coordination of the year-end financial audit (providing accounting professionals to backfill for key management personnel assigned to the Oracle system implementation).
  - The reconciliation of moveable equipment records in a subsidiary system to the general ledger in preparation for conversion of data to the Oracle Financial Applications.
  - The design and implementation of the Oracle Financials Fixed Asset system
- **UCLA's University Relations Department (Fundraising, Development, Finance and Information Management)** - Selection of a new fundraising information system. Mr. Lewis was engaged by the project's Management Steering Committee to address management, technical & political issues hampering project progress. His role was primarily as a mediator & facilitator. After meeting with key project individuals and reviewing the work previously performed by the team, Mr. Lewis recommended/implemented various actions to get the selection process working effectively. The most significant action implemented was assisting the University in preparing a detailed system requirements analysis addressing user requirements, technical issues & cost constraints. Subsequently, the goal of selecting a vendor system was accomplished.
- **The Walt Disney Company** - Assist the Company's Project Management team in the planning and management of a multi-year project to consolidate and migrate approximately 1,000 enterprise applications and 2,000 servers from multiple data centers into three data centers. The project included management and status reporting for over 200

separate projects, in addition to the analysis of application and server inventory information. Specific responsibilities included:

- Project standards and templates - The development of project plan standards and work breakdown structure templates to be used for each of the individual projects using Microsoft Project.
- Project issue tracking - The development and maintenance of an Issues Tracking system using an Enterprise Sharepoint site.
- Project change control - Assist in the development of a Change Control process, including the development and maintenance of an Enterprise Sharepoint site to track, control and report on all Project Change Requests.
- Project estimation and resource requirements modeling - The development of a Resource Requirements Model (using Microsoft Excel) to provide Company management with the ability to estimate the overall duration and resource requirements on a rolled-up basis for all 200+ projects. The model enabled Company management to perform “what-if” analyses based upon numerous factors, including resource availability and time constraints, project complexity, and variable timing for major phases of each individual project. The model also interfaced with extracts from Microsoft Project plans to incorporate project-to-date actual results on a weekly basis.
- Project management and communication - The development and on-going maintenance of multiple Enterprise-wide Sharepoint websites for the collection and dissemination of project information. The design of the sites included creating numerous data lists whose information is created and updated via links to MS Access and Excel databases.
- Project status analysis - The development of an MS Access database system to reconcile numerous sources of application and server inventory information, report on the findings and manage efforts to resolve reconciliation variances. The various sources included data extracted from SQL databases and Excel files.
- Interfaces and testing - Assist project management with the development of a comprehensive list of interfaces associated with the Company’s Enterprise SAP application, and the development of a testing strategy to be used during the migration of the SAP application between data centers.
- **The Walt Disney Company** - Assist the Company’s Project Management team in various aspects of Project and Schedule Management for a \$1.7 Billion IT outsourcing project. The multi-year project encompassed the transition of all of the Company’s U.S. IT operations to external suppliers. The scope of the transition included the Company’s help desk, desktop support, network infrastructure, Enterprise application software (“SAP”) and data center operations. Specific responsibilities included:
  - Developing, maintaining and managing detailed project plans for the Company’s portion of the project.
  - The development of a project management reporting system to monitor and report on the status of the suppliers’ progress on their 12,000+ task project plans.
  - Developing & maintaining a weekly Project Management Dashboard published to both the Company and the suppliers’ management.
  - The development and management of an Enterprise-wide Sharepoint site for use by all project personnel, including executives, project managers and the user community.
  - The development of various Microsoft Access applications to assist in the validation of the suppliers’ compliance with desktop support Service Level Agreements (“SLA”). The applications included interfaces to the Company’s Help Desk software; thereby, providing Company management with the ability to validate all components of the desktop support SLA’s.
- **Private Manufacturer** - Manage the implementation of an MRP system and Production Scheduling system for a large plastic injection-molding manufacturer and distributor. This project included:
  - The planning and management of the overall implementation.
  - The documentation of system requirements for MRP, Production Scheduling and Inventory forecasting.
  - The design of the Bill of Materials.
  - The coordination of the gathering and verification of the data necessary to implement the application.
- **Private Manufacturer** - Design and develop a production forecasting system to enable the company to produce monthly forecasts on over 2,000 parts for periods extending out twelve to twenty-four months. The custom application was developed to stratify the company’s parts by numerous categories to enable the users to forecast using unlimited views of the historical sales data.
- **Independent Private School** - Served as part-time controller for a private school with kindergarten through sixth grade students. Responsibilities included budgeting, internal controls, coordination with independent auditors, development and improvement of policies and procedures, interface with the Finance Committee of the Board of Directors, and various special projects.

- **Federal Home Loan Mortgage Corporation (“Freddie Mac”)** - Served as expert in a civil trial dealing with issues of project management in a large mainframe system implementation. Mr. Lewis testified in Federal Court on behalf of Freddie Mac on the proper procedures to be followed in the management of a system implementation project and the roles of a vendor in the overall system development process.
- **Not-for-Profit Youth Soccer Organization (“American Youth Soccer Organization”)** - For three years, Mr. Lewis served as the manager (“Commissioner”) of a local soccer region serving approximately 1,800 players and 200 teams. In his volunteer role as Commissioner, Mr. Lewis coordinated the year-round efforts of over 2,000 volunteers, including all aspects of the organization: marketing, player registration, team management, player management, information processing, field operations and fundraising.

Earlier in his career, Mr. Lewis spent over a decade with Touche Ross (Deloitte & Touche), an international accounting & consulting firm, serving in both the consulting and audit departments. There, he specialized in providing financial, system and audit services to a wide range of large and small clients.

Mr. Lewis' assignments there fostered significant expertise in analyzing/using sophisticated computer hardware and software.

For two years, he was Senior Manager in charge of both the West Coast Computer Security Practice and Los Angeles Office's use of Computer Analysis Software for Deloitte & Touche. In these roles, he managed and performed security evaluations of mainframe & mid-range computer systems on a national basis and coordinated local training & use of statistical analysis software for cash flow, financial & audit analysis and litigation support engagements.

## Experience

<b>WSR Consulting Group, LLC (periodically as an associate firm)</b>	<b>1996 - present</b>
Senior Manager	
<b>Lewis &amp; Co., An Accountancy Corp., Los Angeles</b>	<b>1994 - Present</b>
Founder and President	
<b>Hankin &amp; Co., Los Angeles</b>	<b>1990 to 1994</b>
Principal specializing in Information System Project Management, Business operations consulting and Litigation consulting	
<b>Deloitte &amp; Touche, Los Angeles</b>	<b>1979 to 1990</b>
Certified Public Accountant, Senior Manager in charge of the West Coast Information Security Consulting	

## Education & Certifications

**University of Southern California, Los Angeles, California**

Bachelor of Science, major in Accounting, 1979

**Certified Public Accountant, licensed in the State of California, 1981**