

Jordan Lapid

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EXPERIENCE

- Senior Consultant (Business Intelligence)** - Sherpa Government Solutions Nov. 2019 – Present
- Provided an end-to-end data pipeline to public sector clients by creating processes to extract, transform, store, analyze, and report on large financial datasets.
 - Developed reports and dashboards for public sector clients to support budget formulation and forecasting by conducting design workshops, writing report specifications, and creating queries/data models.
 - Implemented daily financial data ETL workflows with emphasis on actuals, budget, and encumbrances, resulting in 75% faster posting time and availability for reporting.
 - Identified query optimization opportunities during client software upgrades and created indexes improving the returns times by up to 80%.
 - Developed logic to automate a client's financial forecasting and reporting processes, saving 80 hours of manual data entry per year.
- Consultant (Finance)** - LSI Consulting Apr. 2018 – Oct. 2019
- Implemented a budget management system for public sector clients by gathering requirements, creating blueprint documentation, and coordinating development with technical personnel.
 - Created personnel/form data reports for budget variance analysis by reviewing business needs, creating required queries, and developing reporting data models.
 - Conducted client training sessions for department users on budget forms and reports, system administrators on technical setup, and budget office users on reporting tools and development.
- Senior Financial Analyst** - Kaiser Permanente Oct. 2017 – Apr. 2018
- Performed data analysis for the emergency department to optimize in-house vs. travel nurse scheduling which resulted in a 10% decrease in total labor costs per month.
 - Developed monthly financial budget reports which included financial recommendations and KPIs such as line-item variances and personnel/budget ratios.
 - Assembled annual/mid-year budgets using a zero-based budgeting strategy in collaboration with department administrators for the purpose maximizing budget accuracy.
- Financial Analyst** - Metropolitan Transit System Aug. 2016 – Oct. 2017
- Provided financial guidance/oversight on expenditures and revenues for administrative and operating departments totaling \$280M in the areas of personnel, outside services, materials, and energy.
 - Implemented a budget management system which eliminated company-wide Excel based budget tracking, resulting in a 25% decrease in budget development time.
 - Prepared month-end, quarter-end, and year-end financial reports to executive staff by querying data, loading into Excel, and executing macros to build reports.
- Financial Analyst** - Mental Health Systems Dec. 2014 – Jul. 2016
- Monitored and tracked county, state, and federal funded contracts totaling an excess of \$10M in the areas of personnel, non-personnel and indirect expenses.
 - Collaborated with department directors to create annual budgets by meeting to discuss projected program performance, line-item adjustments, and budgetary limitations.
 - Conducted monthly financial meetings with executive staff providing recommendations based on current spend and forecast analysis which resulted in zero contract overages and a 92% average contract spend rate.

EDUCATION

Western Governors University <i>Master of Science in Data Analytics</i>	2022 – 2023
UC San Diego <i>Full-Stack Web Development Bootcamp</i>	2017 – 2018
San Diego State University <i>Bachelor of Science in Finance</i>	2007 – 2011

TECHNICAL SKILLS

- **Programming:** SQL, Python, HTML/CSS/JS, jQuery, React, node.js, MongoDB, Git, Bash
- **Technical:** SQL Server, PostgreSQL, SAP BOBJ/BW/Webi, Power BI, Tableau, BigQuery, dbt