

***IMPACTS*** *USA*

Advisory Services

## Overview

*Building a better path to the future – world-class advisors crafting strategic advice and solutions for leaders of governmental, non-profit, development, and investment organizations*

2014

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# Founder Executive Profile



**Barbara A. Lloyd**  
Founder/Principal Advisor

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and

Barbara A. Lloyd,  
Municipal Advisory  
Services

- Core strengths in crafting management and financial strategies and solutions for leaders in governmental, non-profit, development & investment organizations
- Career encompasses senior executive positions in industry and government at state and local levels; Keenly attuned to government fiscal and policy considerations in decision-making
- Experienced manager of policies, finances, and accountability in program and project management
- Veteran municipal advisor, investment banker, and government official across more than 25 years in government and public finance
- Specialty is negotiating complex transactions in the public interest and ability to work with diverse parties
- Registered municipal advisor and certified small business with the California Department of General Services



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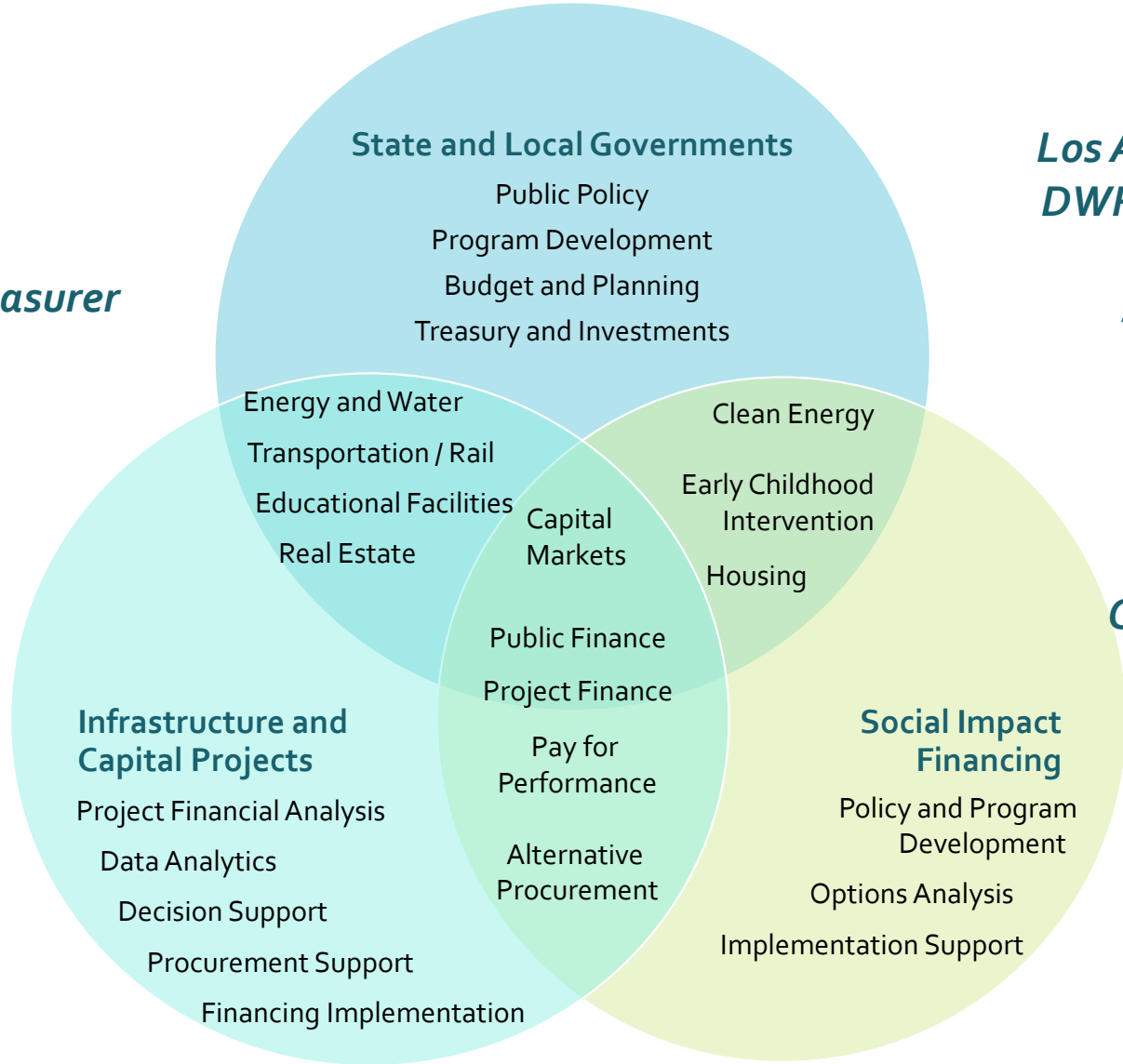


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# Overview of Experience, Services, and Networks

*Oakland*  
*State Treasurer*  
*Lehman*  
*KPMG\**  
*Sperry\**  
*CEC\**  
*RESS\**  
*Beyond the Arc\**



*Los Angeles / DWP / Metro*  
*San Jose*  
*CalVets*  
*CA DWR*  
*Caltrans\**  
*CPS\**  
*CalCEF\**  
*NFP\**



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\* KPMG; Sperry Capital; Clean Energy Capital; Real Estate Strategies and Solutions; Beyond the Arc; Caltrans; CPS HR Consulting; California Clean Energy Fund; and Nurse-Family Partnership are current clients or strategic partners

# Representative Engagements and Pursuits

- **Infrastructure / P3** – various engagements and pursuits in process:
  - Supporting reporting and financial planning for state infrastructure project
  - Developing interim financing program to accelerate delivery of educational facilities
  - Researching financing solutions for advancing environmental mitigation
  - Facilitating investments in water conservation improvements
  - Providing financial advisory support for clean energy developer
- **Social Impact Financing** – Providing strategic advice to Board and Executive Management of national non-profit agency in maternal and early childhood services; offering strategic SIF services to other non-profit organizations or financial institutions/impact investors
- **Public Finance** – Registered Municipal Advisor with SEC and MSRB (also have broker-dealer licenses ready to reactivate through one or more strategic partners); *Barbara A. Lloyd, Municipal Advisory Services* is a certified Small Business with California's Department of General Services and Women-owned Business Enterprise and Local Small Business Enterprise with the City of Los Angeles
- **Management Consulting** – Providing services in government and private sector where unique experience and skills provide high value to organizational leaders and decision-makers; have capacity to contract independently or as Project Consultant with CPS HR Consulting or with other strategic partners
- **Other Strategic Partnerships** – Current strategic partners have expertise in real estate, clean energy, transportation, "big data" analytics, customer interaction, and social media, among others; DVBE and certified small and disadvantaged business enterprises are included



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## For More Information

### **Barbara A. Lloyd**

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