



Received by Office of Clerk of Council
on June 9, 2023

City of Cleveland
Justin M. Bibb, Mayor

Office of the Mayor
Cleveland City Hall
601 Lakeside Avenue, Room 202
Cleveland, Ohio 44114
216/664-3990 • Fax 216/420-8766
www.cleveland-oh.gov

June 9, 2023

The Honorable Blaine Griffin
President, Cleveland City Council
601 Lakeside Avenue
Cleveland, OH 44114

The Honorable Joseph Jones
Chair, Mayor's Appointment Committee
601 Lakeside Avenue
Cleveland, OH 44114

Dear Council President Griffin & Chair Jones:

I am sending this correspondence as official notification that I am recommending the individuals below to serve as my appointment to the Board of Directors of the Cleveland-Cuyahoga County Port Authority pending approval from Cleveland City Council. Included below is the name and term ending date of my nomination to be considered at an upcoming meeting of Cleveland City Council's Mayor's Appointments Committee.

- Luis Cartagena – New appointment filling a vacancy for a term ending 1/31/26

Additionally, a resume is attached for the candidate. Any questions can be directed to Ryan Puente, Deputy Chief of Staff and Chief Government Affairs Officer, at (216) 664-3544 or via email at rpunte@clevelandohio.gov.

Sincerely,

A handwritten signature in blue ink, appearing to read "Justin M. Bibb".

Justin M. Bibb
Mayor | City of Cleveland

Luis Cartagena, CPA, CGBP

Cartagena CPA & Consultants LLC 6779 Memphis Ave Ste 8, Brooklyn, Ohio 44144

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LuisC@cartagenacpa.com

Professional Experience

Cartagena CPA & Consultants, LLC

President/CEO (April 2017 – Present)

- Accountable for the administrative, financial, and risk management operations of the company.
- Provide business advisory services for startup to middle market companies through Small Business Development Center.
- Provide outsourced CFO services on such matters as accounting procedures, internal policy, fiscal year review, and financial statements.
- Assist clients with creation of budget, projections, startup expense, and market research.
- Monthly general ledger maintenance, bank reconciliations, payroll entries, disbursements, and internal financial statements.
- Assist with preparation of audit materials.
- Create and lead workshops on financial management topics such as cost control, understanding variable vs fixed costs, pricing, and planning.

Cuyahoga County

Inclusion Officer (Aug 2016 – Dec 2018)

- Provide leadership, guidance, and support with establishment of written policies and procedures regarding Diversity Programs and the development of forms, applications, and documents.
- Outreach to vendors, strategic partner network, and stakeholders.
- Expansion of Cuyahoga County registered SBEs including minority and women-owned businesses.
- Streamlined registration process for SBEs seeking to contract with Cuyahoga County.
- Monitor and track diversity participation goals in applicable bid or proposals issued by County.

Minority Business Development Agency /Greater Cleveland Partnership/Commission on Economic Inclusion

MBDA fosters the growth and global competitiveness of U.S. businesses that are minority-owned. Greater Cleveland Partnership (GCP) is a membership association of Northeast Ohio companies and organizations and one of the largest metropolitan chambers of commerce in the nation.

Business Advisor, Strategic Planning (April 2013 – April 2016)

- Manage a portfolio of Minority Owned Enterprises.
- Assisted portfolio companies in securing over \$45M in contracts and capital awards resulting in 223 new jobs.
- Discuss strategies with partners to deliver best solution to reach projected targets and expectations.
- Interpret financial statements and recommend course of action to achieve business goals and objectives.
- Conduct research on market trends and incorporate results in business development strategy for client.
- Prepare and present business proposals and presentations.
- Follow market trends to assist client in developing and improving existing products and/or services.

Business Advisor, General Business (September 2011 – April 2013)

- Accounted for 40% of annual goal in contracts/procurement/capital awards resulting in \$11.4m in transactions, 80 new jobs created, and 39 jobs retained.
- Manage a portfolio of Minority Owned Enterprises.
- Conduct assessment of businesses applying for services from the center.
- Interpret financial statements and recommend course of action to achieve business goals and objectives.
- Manage relationships with strategic partner organizations.

The Metrohealth System

Staff Accountant (August 2010 - September 2011)

- Analysis of assigned balance sheet/income statement accounts to identify and rectify variances.
- Preparation of year-end audit work papers, grant reports with supporting documentation and reconciliations, and journal vouchers for month-end close.
- Investigate and resolve accounting and reporting issues identified by operations staff.
- Maintenance of accounts receivables for reimbursement entries through various Foundations.
- Automation of check disbursement process for reimbursement of expenses, travel, salary, and grant funded activities
- Reconciliation of credit card statements and machines for 78 locations.

Professional Affiliations/Highlights

MetroWest Community Development Organization

Board Chair (2017 – June 2023)

- Set agenda and lead meetings for governance, finance, and board.
- Provide assistance to Executive Director for strategy and annual budget.
- Assist with request for proposals and contractor identification.
- Assist with Ad Hoc committees and initiatives.

Saint Luke's Foundation

Treasurer - Board of Trustees (2014 - 2022)

- Attend quarterly Board meetings. Set strategy for organization program areas. Provide assistance to SLF President on Ad Hoc committees. Make recommendations on annual approval of \$10M to \$14M in grant requests.
- Investment Committee member – Attend quarterly meetings with OCIO CommonFund to review performance of \$171M endowment. Annual review of investment policy. Provide assistance as needed to CFO.
- Chair – Strong Neighborhood Program Strategy Committee – Review agenda and coordinate quarterly committee meeting. Engage non Board committee members. Attend quarterly site visits of potential grantees. Review grant requests and make recommendation to Program Manager. Attend quarterly grant review meeting. Provide assistance as needed to Program Manager.

Cuyahoga County Community Improvement Corporation

Board Member (2017 - 2018)

- Review and vote on approvals/disapprovals of industrial revenue bond financing and economic development lending applications.

Education

2013 Weatherhead School of Management CWRU

- Designing Solution for Innovation & Strategy Certificate
- Executive Management Certificate

2011 Ursuline College – MBA Financial Planning & Accounting

2009 University of Phoenix – Bachelor of Science in Accounting

Certifications

Certified Public Accountant – Active License #53478

Certified Global Business Professional - NASBITE International

Awards

Crains Most Notable Accountants & Consultants 2023
OCHLA/State of Ohio – Distinguished Hispanic Ohioan 2015
Cleveland Browns NFL Hispanic Heritage Leadership Award 2014
Crain’s Cleveland Business 40 under 40 - Class of 2014
City of Cleveland Leadership Award 2014
Convencion Hispana Leadership Award 2013
Esperanza, Inc. Volunteer of the Year 2011
Kaleidoscope Magazine Cuarenta/Cuarenta (40/40) Club 2007

Volunteer

Neighborhood Family Practice – Board Member (2023 – Present)
CMHA Audit Committee Member (2013 – Present)
Cuyahoga Arts & Council Audit Committee Member (2020 – Present)
Crain’s Business Diversity Council (2014 - 2022)
Chairman, Hispanic Business Center (2014 – 2016)
President – Hispanic Roundtable Community Programs (2014 – 2020)
Treasurer, Young Latino Network (2009 – 2013)
Finance Committee, Esperanza Inc. (2010 – 2013)
Spanish Language Advisory Board, Cuyahoga County Board of Elections (2010 – 2013)
Site Manager, Volunteer Tax Preparer, EITC Coalition (2008 – 2011)

Skills

- **Bilingual (Spanish/English)**
- **Proficient in Microsoft Word, Excel, PowerPoint, Access, MS Project**
- **On-site Deposit Banking System / 10-key adding machine**
- **General Ledger / Financial Statement Preparation**
- **Oracle Bank Reconciliation**
- **Management – Team Supervision**
- **Strategic Planning**
- **CRM Management**
- **Gantt Charts / Work Breakdown Structure**
- **Software - Quickbooks / Peachtree / Lawson / On-Base / SharePoint / ProfitCents**
- **Social Media Tools and Management**
- **Blackboard**