

BUSINESS EXPERIENCE

DEVELOPMENT CONSULTANT

JANUARY 1992 - PRESENT

As a consultant I work with clients to facilitate effective, well managed organizational growth and development programs. I provide this counsel drawing on a unique breadth and depth of academic and practical experience.

Examples of Clients include:

Alberta Emerald Foundation	Caritas/Covenant Health
CKUA Radio Network	Canadian Skin Cancer Foundation
Royal Roads University	City West Child & Family Centre
Northern Lakes College	Blue Heron Social Support Services
Royal Alexandra Hospital Foundation	The Boys' & Girls' Clubs of Edmonton
Centre for Constitutional Studies, UofA	Buffalo Park Interpretive Centre
APEGGA	Women in Need, Edmonton
Northlands	Association of Fundraising Professionals
Alberta Land Trust Alliance	Theatre Network
Canadian Gene Cure Foundation	Selections Career Support Services
Edmonton Brain Injured Rehabilitation Society	Edmonton Opera Association
Disabled Sailing Association of British Columbian – Victoria Branch	West Coast Environmental Law
Victoria Integration Society	The Muttart Public Art Gallery
Edmonton Realtors' Charitable Foundation	Association for Volunteer Administration, Alberta & USA
Alberta Association of Registered Nurses	Agrium Inc.
2Learn.ca Education Society	Mount Royal College
	The Legal Archives Society of Alberta

Work with these Clients includes:

- Comprehensive organization and development audits
- Strategic and Project Planning
- Organizational structure and capacity enhancement
- Campaign feasibility studies and implementation
- Mentoring with Development staff, Senior Administration and Leadership Volunteers
- Creation and testing of case document materials
- Development office and organizational restructuring
- Research and policy writing
- Periodic counsel – fund development, marketing and organizational management
- Administration and program management
- Planned giving, major gift and stewardship training
- Recruitment, creation of position descriptions, measurement and evaluation processes
- Workshops and Curriculum development
- Development Program Reviews
- Volunteers training in research, management and solicitation techniques
- Creation of Corporate Contribution Programs

EXECUTIVE DIRECTOR**ALBERTA COLLEGE FOUNDATION, EDMONTON, AB
JANUARY 1999 – SEPTEMBER 2000**

Recruited to establish the Alberta College Foundation for Artistic & Academic Distinction. Initiatives included the development and implementation of active annual, major and planned gift campaigns. Structured the Foundation office including federal registration, creation of policies, procedures and protocols, interface between and coaching of College and Foundation Boards, management and staff in effective development practices and relationship building strategies. Recruited and trained key staff, implemented the Raiser's Edge database, prepared and implemented development plans and tools, and worked with both Boards to clarify roles, responsibilities and development priorities. This senior role also encompassed Alumni relations and management of Alberta College's archives.

MANAGER OF ADVANCEMENT**UNIVERSITY OF VICTORIA, VICTORIA, B.C.
OCTOBER 1996 TO JANUARY 1999**

In this first University decentralized development initiative, I was initially retained by the Faculties of Law and Engineering to assist with establishing development and communication programs and to create a model for other Faculty Development offices. Accomplishments included: audit and feasibility studies resulting in Faculty specific development plans, creation of project specific case materials, customization of Faculty planned giving tools, restructuring management processes for Faculty bursaries, scholarships and awards, establishing two offices, clarification of donation management and stewardship procedures, alumni relations, writing and publication of articles for internal and external audiences, and initiation of active fund raising including alumni, annual, planned and major gift presentations locally, nationally and internationally. In February 1997, I was seconded by the Vice-President Research to write a \$5,000,000 grant application that achieved full collaborative support from all of the University's Deans. In January 1998, I was appointed Manager of Advancement for the Faculty of Law to continue work initiated with the Faculty and to assist the Chair in Environmental Law and Policy to endow the Chair.

CO-ORDINATOR, FUND DEVELOPMENT**CAREWEST, CALGARY, ALBERTA
JANUARY 1990 – JULY 1992**

Established the Fund Development Office for Carewest, a multi-site, publicly funded, long-term care organization. This initiative involved the strategic planning, creation and implementation of:

- Donor cultivation, recognition and stewardship procedures, activities and tools
- Donation management protocol including computerized donation system
- Recruitment, supervision and training of development and communication staff
- Corporate and annual campaigns
- Planned giving materials and program
- Capital campaign research and planning
- Major gift campaign research and planning
- Liaison with Board and senior management

**COORDINATOR/ACTING ASSISTANT DEAN
EXTENSION SERVICES****OLDS COLLEGE, OLDS, ALBERTA
OCTOBER 1986 – MAY 1989**

Implemented credit and non-credit programs. Recruitment, supervision and team leadership of support, programming and instructional staff, client needs identification and course development, budget management and program marketing. Developed and implemented international study programs. Designed, secured funding for and managed the on-site Serigraphy Arts (Silk Screen) Program for Aboriginal offenders at the Bowden Institute. Structured and managed the Olds College Basic Literacy Program. This senior administrative role included recruitment and supervision of certified Alberta Teachers, screening of participants and management of program finances and reporting.

EDUCATION

Bachelor of Recreation Education, University of British Columbia (1984)

CERTIFICATION

- Advanced Certified Fund Raising Executive (ACFRE), 2008 permanent designation
- Certified Fund Raising Executive (CFRE), (1996 to present)

PROFESSIONAL MEMBERSHIPS

- Association of Fundraising Professionals (AFP)
- Canadian Association of Gift Planners (CAGP)

PROFESSIONAL AND PERSONAL DEVELOPMENT

- Ongoing advanced education sessions with AFP, CAGP and CRA
- AFP International Conferences and Symposiums (1990 to 2012)
- AFP Alberta Conference, 2000, 2002, 2004, 2006
- CAGP National Conference, 2001 to 2012
- Legal Education Society of Alberta, Not-for-Profits & Charities, 2005
- AFP Faculty Training Academy, 2004
- AFP High Impact Philanthropy, 2002
- Canadian Centre for Philanthropy Symposium, 2002
- Planned Giving, 1991, 1998, 2004 (Minton & Somers – introductory & advanced programs & updates)
- Courses in Career and Personal Counseling, University of Calgary and by distance education from the University of British Columbia (1992 – 1994)

WORKSHOPS, SEMINARS AND COURSES DEVELOPED AND/OR PRESENTED**CAGP, National Conference**

Whose Role is it Anyways (2012)

AFP, International Conference

Forum Facilitator (2012)

AFP, Vancouver Island Chapter

Fundamentals of Fundraising (2011)

Whose Role is it Anyways – Board and Staff relations (2010)

Volunteer Victoria

Whose Role is it Anyways – Board and Staff relations (2010)

AFP, Edmonton & Area Chapter

Fundamentals of Fundraising (2010)

Train-the-Trainer (2009)

CFRE – applications on line – a practical session (2009)

Whose Role is it Anyways – Board and Staff relations (2009)

Ethics in Action (2004/05/06)

Ethics & Fundraising – What does it mean to you the fundraising professional? (2002)

CFRE Course: 2000 – present – annual sessions

First Course: 1999 – 2009 – annual sessions

Essentials of Fundraising, AFP Edmonton & Area Chapter

Redevelopment and instruction of course modules (2006/07/08)

Voluntary Sector & Fund Development Program, Grant MacEwan College, Edmonton

Professional, Legal and Ethical Issues in Fund Development (2003/04/05/06)

Fund Development Approaches IV: Planned Giving and Major Gifts (2004/05/06)

CAGP Round Table, Edmonton

When the Rubber Hits the Road – practical gift planning (2008)

Endowments – what are they and what to be aware of (2003)

Putting it all in Context – estate realities (2002)

CA Forum North, Jasper

Putting it all in Context – estate realities (2003)

AFP/AAFRE Alberta Conference

Case for Support, Ethics and Team Building seminars (2000/ 2002)

Ethics and How to Hire a Consultant (2004)

AAFRE, Edmonton

Planned Giving on a Budget (2004)

Communicating with Donors (2004)

VOLUNTEER AND LEADERSHIP POSITIONS

- AFP Vancouver Island Chapter – Program Committee (2010 to 2012)
- AFP International - Higher Education Workgroup & Task Force (2006 – 2009)
- CFRE Certification Subject Matter Expert (2005 – 2007)
- CAGP Edmonton & Area Round-table, Director (2006 - 2009)
- AFP, Edmonton & Area Chapter - Director
 - ✓ Chair, Ethics Committee (2001 to 2007)
 - ✓ Chair, Nominations Committee, Edmonton National Philanthropy Day (1999)
- Director, AFP Canada Foundation – (2003 – 2005)
 - ✓ Chair, Program Funding (2003/04); Chair, Major Gifts (2005)
- Director, Lansdowne Child Care & Family Centre – (2002 – 2005)

OUTSIDE INTERESTS

I am an active outdoor enthusiast and equestrian. My interests also encompass skiing, sailing, travel, music, food and wine, gardening, and a wide range of literary and artistic pursuits.