

## **BUSINESS EXPERIENCE**

### **DEVELOPMENT CONSULTANT**

**JANUARY 2001 - 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
CKUA Radio Network	Centre for Constitutional Studies, UofA
Northern Lakes College	City West Child & Family Centre
Northlands	Blue Heron Social Support Services
Heritage Community Foundation	Lesser Slave Lake Community Complex
Edmonton Brain Injured Rehabilitation Society	The Boys' & Girls' Clubs of Edmonton
Edmonton Realtors' Charitable Foundation	Buffalo Park Interpretive Centre
Alberta Association of Registered Nurses	Women in Need
	Association of Fundraising Professionals
	Theatre Network
	Selections Career Support Services

#### **Work with these Clients includes:**

- Comprehensive organization and development audits
- 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
- Administration and program management
- Periodic counsel – fund development, marketing and organizational management
- Planned giving, major gift and stewardship training
- Recruitment, creation of position descriptions, measurement and evaluation processes
- Research and policy writing
- Strategic and Project Planning
- Workshops and Essentials Program curriculum development

### **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.

**CONSULTANT****ACTIVATIONS, ALBERTA AND B.C.  
JULY 1992 – DECEMBER 1997**

As Activations' principal consultant I worked with clients to facilitate effective, well-managed communication, marketing and fund development programs. I provided this counsel drawing on a unique breadth and depth of academic and practical experience.

**Examples of Clients included:**

West Coast Environmental Law, Vancouver, BC  
The Muttart Public Art Gallery, Calgary, Alberta  
Association for Volunteer Administration, Calgary, Alberta & USA  
Agrium Inc., Calgary, Alberta  
Mount Royal College, Calgary, Alberta  
The Legal Archives Society of Alberta, Calgary & Edmonton, Alberta

**Work with these Clients included:**

- Strategic planning
- Recruitment, creation of position descriptions, measurement and evaluation processes
- Development Program Reviews
- Campaign Feasibility studies
- Periodic counsel
- Case development for donation, sponsorship and underwriting opportunities
- Volunteers training in research, management and solicitation techniques
- Creation of Corporate Contribution Programs
- Workshops and Courses

**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)
- Alberta Association of Fund Raising Executives (AAFRE)

**PROFESSIONAL AND PERSONAL DEVELOPMENT**

- AFP Alberta Conference, 2000, 2002, 2004, 2006
- CAGP National Conference, 2001, 2003 and 2006
- 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
- AFP 1997 and 1998 International Conferences & 1999 Symposium
- 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 PRESENTED**

### **AFP, Edmonton & Area Chapter**

- 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: Case for Support, Volunteers & Staff: Roles, Responsibilities and Relationships and Planned Giving sections (2000/ 2001/ 2003)
- First Course: Introduction to Fund Raising, Managing Development Office Operations and The Roles of Volunteers, Board Members and CEOs sections (1999, 2002, 2003)

### **Train-the-Trainer, AFP Edmonton & Area Chapter**

- Training of volunteer instructors to offer AFP Essentials, First and CFRE Courses (2009)

### **Essentials of Fundraising, AFP Edmonton & Area Chapter**

- Redevelopment and instruction of course modules: Introduction to Fundraising and Major Gifts; co-development of Annual Giving, Grants and Board & Volunteer Development (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 International
  - ✓ Higher Education Task Force (2007 – present)
  - ✓ Higher Education Workgroup (2006)
- CFRE Subject Matter Expert (2005 – 2007)
- CAGP Edmonton & Area Round-table, Director (2006 - present)
  - ✓ Member, CAGP Leave A Legacy committee, Edmonton (2004 - 2005)
- 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.