

## **PROFESSIONAL SKILLS SUMMARY**

### **CLIENT RELATIONS, MARKETING & SALES**

- Successfully directed and managed all aspects of establishing and managing relationships with individual, member, corporate, governmental and community partner clients to meet revenue goals. This included all client solicitation, acquisition, retention, engagement, and upgrades.
- Managed all client communication, orientation, fulfillment, and recognition. Responsible for all follow through for client concerns, comments and questions.
- Utilized a variety of print, web, and interpersonal communication tools to establish and build client relationships. These included; multi-level campaigns, direct mail appeals, email appeals, extensive social media and web promotion, face-to-face meetings, email and phone communication, formal written correspondence, and presentations for 3 to more than 300 persons.
- Created and implemented new strategies to generate new sources of revenue, retain clients, and upgrade client commitments. These included: special appeals and campaigns; new incentives, benefits, and sponsorships; recognition and appreciation events; membership materials; welcome kits; orientation; e-Newsletter, and engaging affinity groups.
- Represented the organization in the community and liaised with business and government partners. This included service with County Commission, Chamber of Commerce, and various professional affiliations.

### **HUMAN RESOURCES, ADMINISTRATION & FINANCE**

- Established HR policies, transitioned employees from exempt to non-exempt, created hiring procedures, probationary periods, performance reviews, and employee benefit eligibility, and completed an Employee Handbook with support of a contracted law firm. In partnership with Co-Director.
- Restructured Department, created position descriptions, work plans, hired and trained staff. Supervised, coached and evaluated employees in their goals, strategies, and performance. Directed peer level staff and volunteers in roles, best practices and success strategies.
- Supported volunteer Boards and Committees in completing work and achieving organizational goals by arranging meeting logistics, preparing announcements, agendas, supporting materials and reports, as well as organizing information and conducting research for projects.
- Managed client database, insuring accuracy for billing, fulfillment, acknowledgements, and reporting. Established client filing system for data integrity, to improve audit process, and to comply with industry standards.
- Managed portfolio progress, collection rates, and forecasting. Established new procedures for improving collection rates. Implemented tools to measure and communicate monthly goal attainment and year-end projections to Board of Directors.
- Revised operational budget, developed new chart of accounts, establish accounting procedures, and worked with bookkeeper to assure utility and accuracy of financial reports. In partnership with Co-Director.

### **CONTRACT & GRANTS MANAGEMENT**

- Successfully directed and managed all aspects of grants programs. This included; prospect research, proposal preparation, maintaining funder relationships, contract compliance, reporting, and securing new sources of funding.
- Performed detailed research on corporate, public and private foundations to identify and prioritize funding opportunities, deadlines, guidelines, and criteria for submitting grant proposals.
- Prepared competitive grant proposals by creating detailed budgets, writing proposals incorporating current social science research, and refining language to strategically position programs for competitive funding.
- Complied with requirements of funders, by preparing qualitative and quantitative reports detailing program results and expended funds.

### **EVENT & MEETING PRODUCTION**

- Successfully directed and managed a wide range of events from conception to implementation for as many as 900 attendees. Included event design, planning, coordinating, promoting, producing, revenue goal setting and attainment, budget creation and budget management.
- Oversaw and coordinated all event logistics, contracts, registration, deadlines, and timelines while supervising all vendors and serving as liaison to special guests, entertainers, and presenters.
- Responsible for all event promotion. Included designing, creating and producing all invite, ad and registration copy, web elements, email marketing, social media, print and radio.

## **COMPUTER APPLICATIONS & SOFTWARE**

- **PC and MacOS.**
- **Microsoft Office:** Word, Excel, Publisher, Filemaker, Power Point. Intermediate to Advance.
- **Accounting:** GreatPlains and QuickBooks. Basic.
- **Adobe** Acrobat and PhotoShop. Basic.
- **Email Marketing:** Constant Contact and Emma. Intermediate.
- **Client Databases:** Raiser's Edge, GreaterGiving, and Donor Perfect. Intermediate to Advance.

## **TRAINING & CERTIFICATION**

National Career Readiness Certificate (NCRC), Program Management, Effective Proposal Writing, Resource Development, Market Research, Closing the Deal, Needs Assessments, and ADL Diversity Training.

## **EDUCATION**

Liberal Studies, B.A., Emphasis: Creative Arts

San Francisco State University, January 2000

## **PROFESSIONAL EXPERIENCE**

### **DEVELOPMENT DIRECTOR May 2010 – Sep 2011**

### **Rock 'n' Roll Camp for Girls Portland, OR**

Responsible for securing contributed income by creating and implementing development strategies for individual philanthropy; corporate and foundation giving; and special event production. Developed, planned, organized, promoted, and tracked all fundraising activities and opportunities. Worked in partnership with Management Staff and the Board of Directors to stabilize the organization during times of significant organizational transition.

### **DEVELOPMENT DIRECTOR Dec 2007– Mar 2010**

### **Friends of Arts Education Cerritos, CA**

Responsible for securing contributed income by successfully creating and implementing development strategies for individual philanthropy; corporate, public, and foundation giving; special event production; and special projects. Developed, planned, organized, promoted, and tracked all fundraising activities and opportunities. Worked in close partnership with Director of Education and the Board of Directors to maintain and improve the operations of the organization in lieu of an Executive Director.

### **MEMBERSHIP MANAGER Mar 2007 – Dec 2007**

### **Orange County Museum of Art Newport Beach, CA**

Responsible for leading all aspects of museum's Membership program, achieving revenue growth 120% year-to-year by creating annual strategic plan. Oversaw, coordinated, and tracked all activities pertaining to member acquisition, upgrades, and renewals. Managed all correspondence, solicitation, benefit fulfillment, and recognition.

### **MEMBERSHIP MANAGER Aug 2006 – Feb 2007**

### **California Association of Community Managers Laguna Hills, CA**

Responsible for leading all aspects of Membership program for 2,500 member statewide, professional association. Oversaw, coordinated, and tracked all activities pertaining to membership recruitment, orientation, engagement and retention. Managed success of 38 events across the state, including sponsorship solicitation, membership attendance, promotional materials and communications.

### **CAMPAIGN MANAGER Apr 2005 – Jul 2006**

### **Orange County United Way Irvine, CA**

Responsible for managing a portfolio of more than 70 accounts in Real Estate, Insurance and Professional Service market sectors with revenue goals in excess of \$3,000,000. Oversaw, coordinated, promoted, and tracked all fundraising activities and opportunities.

### **CAMPAIGN MANAGER Sep 2003 – Apr 2005**

### **Central Orange Coast YMCA Newport Beach, CA**

Responsible for all individual donor and special event fundraising for YMCA Branch. Developed, planned, organized, promoted, and tracked all fundraising activities and opportunities. Supported Executive Director and Regional Board of Directors with a variety of organizational and managerial projects.