

STACY W. EHRlich, CFRE, MAHS
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512-751-6161

EMPLOYMENT

June 2004
- present

SEEDS FOR CHANGE CONSULTING, llc

Austin, Texas

Principal and Owner

Mrs. Ehrlich leads a dynamic consulting firm which provides customized, wrap-around services for non-profit organizations to maximize their potential in meeting their missions. Stacy directs a team to help organizations achieve their goals and objectives through systematic, effective and efficient organization and planning. Representative projects include several event plans, preparing and executing a \$10 MM capital campaign, strategically organizing a sustainable annual fund, and creating a 5 year development plan to take an agency's fundraising revenue from \$ 1.5 MM to \$13 MM annually.

Since mid-2004 Seeds for Change has contracted with more than 45 Austin area charities and over 20 charities throughout the state of Texas and across the United States. More than half of the agencies re-contracted with Seeds for Change to take them above and beyond the scope of the original contract, including five clients who have negotiated five or more contracts over the life of the firm-client relationship. With a team of 10 partners and Mrs. Ehrlich at the lead, the firm is able to meet nearly any agency need.

February 1996
- May 2004

AUSTIN WALDORF SCHOOL

Austin, Texas

Director of Development

As the school's first full time development director and senior member of the administrative staff, Stacy was responsible for all aspects of a highly successful, multi-faceted fundraising program. In collaboration with the Board, Stacy's focus included community building and communication, annual giving, grant writing, special events, cultivation, recognition and stewardship, as well as a variety of small, ongoing fundraisers. Over her eight-year tenure, Stacy guided the development and campaign committees through the successful achievement of raising more than \$7 million in charitable contributions.

Mrs. Ehrlich was responsible for the school's first capital campaign of \$3 million in support of its eventual \$5.7 million expansion into a K-12 school. Stacy's original capital campaign responsibilities included the authoring and publishing of the case for support and auxiliary materials. Stacy researched and wrote all grant proposals to corporations and foundations. Interested in multi-faceted collaboration, Mrs. Ehrlich served on the faculty budget committee, and the school's Development and Finance Committees as well as chaired the Long Range Planning Committee. She served as a non-voting member on the Board of Trustees and Board Executive Committee.

August 1995
- February 1996

UNIVERSITY OF TEXAS

Austin, Texas

Development Associate for Major Gifts, Office of Development

Mrs. Ehrlich utilized fundraising knowledge and experience to effectively support the Assistant Directors of Major Gifts, and the Development Office as a whole. She joined others a sounding board for various cultivating and fundraising initiatives. She proactively managed the newly created major gifts department of the Office; responsibilities included donor and prospect research, the scheduling of donor visits, the coordination of travel arrangements, and general administrative tasks. Stacy represented the Office and The University at social, political and fundraising events; and coordinated the Presidential guest seating at athletic events.

February 1994
- May 1995

MARINE MILITARY ACADEMY

Harlingen, Texas

Director of Corporate and Foundation Relations

Stacy served as the Academy liaison with all corporations and foundations. Responsibilities included writing all grant proposals for the Academy's \$14 million capital campaign. In addition, she designed and orchestrated a major solicitation initiative involving the Board and several Texas Foundations. Mrs. Ehrlich was responsible for the solicitation, collection and tracking of all campaign gifts, and the frequent contact with donors either personally or by letter. She also chaired the Scholarship Committee, served as the Academy's Scholarship Administrator, and was responsible for all relationships between the donors and student recipients.

On behalf of the school, Mrs. Ehrlich served as liaison with all major donors, including the Board of Trustees and arranged several events for the Development Office and the President. She coordinated a large memorial project from start to finish, including project planning, construction and the dedication ceremony. The success of this project included careful development and maintenance of a diplomatic relationship with the donor and her family.

Strong work ethic demonstrated through various employment positions in college and immediately following graduation including: university counselor for freshman recruitment and admissions (Houston), assistant account executive partnering corporations with charities – public relations (Houston), director of development & public relations (Houston), executive and marketing assistant (Houston), real estate marketing research intern (Austin), advertising intern (Paris, France and Corpus Christi), summer camp counselor (Estes Park, CO and Corpus Christi).

EDUCATION

Certified Fund Raising Executive (CFRE), CFRE International, original certification August 1999. Current recertification valid through 2014.

Master of Arts in Human Services, Non-Profit Management, St. Edward's University, graduated December 1996, GPA 3.88. Merit Scholar

Master of Education in Counseling and Guidance, University of Texas – Pan American, August 1994 – May 1995. 18 hours completed with 3.83 GPA.

Bachelor of Science in Advertising, University of Texas at Austin, graduated May 1991.

PROFESSIONAL DEVELOPMENT, RECOGNITION AND SKILLS

Association of Fundraising Professionals – The Accidental Fundraiser Conference Lecturer 2004, 2005

Association of Waldorf Schools of North America – Effective Practices Author of Capital Campaign Article 2004

CFRE Survey Course Lecturer 2000 and 2004; Participant 1999

Rudolf Steiner Foundation Shared Gifting Group of the Mid States, Member and Participant 2002, 2003, *Chair 2004*

Towards Healthy Waldorf Schools: A National Conference, Sacramento, Chicago, Spring Valley, NY and Baltimore, MD

Lecturer 1998, 2000, 2003 Participant 1996, 1997, 1999, 2000, 2003, 2004

AFP Central Texas Funders Forum Participant 2002, 2004

Development and Administrators Network of the Association of Waldorf Schools of North America, Chicago & Spring Valley, NY

Conference Speaker 1998 Participant 1998 and 2003

“Grant and Gift Proposal Development for Private Schools” Seminar, San Antonio 1997

Planned Giving Seminar, NSFRE, Austin 1997; AFP, Austin, 2008

Seeds for Change Consulting, LLC Breakfast Series for non-profit professionals – lead organizer and frequent presenter 2009 - present

Summer Institute for Independent School Advancement Professionals, CASE, Williamsburg, VA 1994

The Art of Fundraising 101, Rice University – Continuing Education, Houston 1993

Strong communication and organization skills. Ability to work both independently and as a team player. Innovative self-starter and creative thinker. A planner who is detail and results oriented, with an innate ability to see the big picture.

RECENT COMMUNITY SERVICE

All Saints Episcopal Day School *Gala Co-Chair* 2010; Gala committee member 2011

Avon Breast Cancer 3-Day Charity Walk from Ft. Worth to Dallas, Participant – April 2002

Association of Fundraising Professionals (AFP) – Central Texas Chapter

Active Member 1996 – Present

Board of Directors, (nominated) Vice President – Outreach & Access 2012,

Vice President – Annual Fund 2005,

Vice President – Membership 1999

Blossoms Early Childhood Center – *Board of Directors, Founding Member* 2006 - 2009

Catholic Charities of Central Texas – inaugural SEEDS member 2010-2012; luncheon event planner & committee member 2011

Heart House of Austin *Board of Directors, 2005- 2009* Charity Fashion Show (Inaugural Year) Event Chair 2007, Host Committee 2008

Junior League of Austin

Sustaining Advisor, Donor Development and Stewardship Committee 2010

A Christmas Affair Ad Sales Chair 2009, Children's Events Chair 2007, Volunteer Placement Chair 2002, Media Chair 2000

Done In A Day Project Researcher, 2006

Coats for Kids Voucher Co-Chair 2005, Celebrity Coat Auction Co-Chair 2004

Focus Area Project Researcher 2003-2004

Grants Chair 2001

Internal Publications Writer and Assistant 1998-99

Assistant to the Education, Training and Public Affairs Chair 1997-98

Hispanic Mother-Daughter Program, 6th Grade Coordinator 1996-97

Ronald McDonald House: Lights of Love Committee Member 2004 – 2006 and Bandana Ball Committee Member 2002

St. Andrew's Episcopal School

Brown Bag Parent Discussions *Chair* 2011-2012

Class Representative 2008-09; Parent Peer Group Coordinator, 2009 – 2011

Family Fair for Financial Aid, Silent Auction Coordinator 2008

Texas School Public Relations Association – Crystal Commendation Awards Judge 2004

University Catholic Center Finance Office Volunteer 2004

Zeta Tau Alpha House Corporation Board *Treasurer* 1998 – 2003

Gina M. Budd

M (512) 422-6571 | EM: gbudd@austin.rr.com

PROFILE: Project consultant with 18+ years of diversified experience in marketing, public relations and other communications strategies. From planning and strategy services, to turnkey project execution, Budd flexibly augments an organization's team for short- or long-term marketing support.

Professional Experience

INDEPENDENT CONTRACTOR/FREELANCER, Austin, TX

Marketing Consultant and Project Manager (12/04 to current)

Summary: Provides flexible scope of consulting and project management services to agencies, small and large businesses, as well as non-profit organizations. Expertise includes strategic planning, positioning and messaging, sales tools and presentations, event planning/support, web content development and creative resource coordination. Some clients/projects include:

- Donavi Corp (2010): Planned all marketing and communication components of event benefitting refugee organization at Paramount Theatre that resulted in sold-out crowd.
- Ernst & Young (2005-2008): Managed Ernst & Young Entrepreneur Of The Year® program including event promotion/execution, sponsor development and management, nominees and judging process, budgeting, and all internal and external communications.
- Dream Jobs Inc. (2006, 2008): Provided strategic planning for start-up company including message development, event planning, web content creation.
- Virtus Financial Group (2008): Directed logo and brand ID, as well as new website with creative resources.
- Bergan Casey Public Relations (2005): Teamed with PR firm to plan and execute various projects for People's Community Clinic and Scott & White Health System.

TMANAGE, Austin, TX (acquired by MegaPath Networks in October 2003)

Manager, Marketing Communications (8/2000 to 2/2003)

Summary: Responsible for directing the brand identity and marketing communications initiatives for a start-up technology company that deploys and manages VPNs for F1000 companies. Responsible for all communication components including direct marketing, product marketing, event participation, lead generation, PR, analyst relations, presentations and sales tools.

- Developed company positioning and messaging; directed new brand identity components.
- Directed the re-launch of company website.
- Created comprehensive Sales Intelligence Guide to educate and train the sales team.
- Spearheaded multiple sales training programs for sales team.
- Led cross-functional team to reposition corporate product offerings.
- Awarded company's employee of the month twice.

SICOLAMARTIN, Austin, TX

Senior Account Manager (8/98 to 2/2000)

Summary: Responsible for the development and management of effective B2B marcom programs and tactics, including advertising, direct mail, tradeshow/event promotions and website development for a leading provider of billing and customer care software and solutions to the communications industry. Also worked on ASP and web hosting accounts.

- Contributed to the successful launch of a subsidiary company, including naming, corporate message development and comprehensive promotional tactics.
- Managed launch of corporate website, including development of interactive product model.

RIVES CARLBERG, Houston, TX

Account Executive (10/97 to 8/98)

Summary: At this ad/pr "agency of #1 brands", responsible for the development and execution of PR and marcom plans encompassing media relations, publications and community relations for accounts including: Uncle Ben's Rice, Texas Surgical Associates and KFC.

Gina M. Budd

Page 2/Professional Experience Continued

TENET HEALTH SYSTEM, Houston, TX

Manager, Marketing & Public Relations (11/93 to 9/96)

Director, Marketing & Public Relations (9/96 to 10/97)

Summary: Responsible for hospital-wide integrated marketing and public relations plans for a 336-bed acute care hospital, including strategic campaign development and implementation, advertising, media relations, crisis communications. Oversaw charitable contributions, volunteer department, publications, physician joint marketing activities and community partnerships.

- Developed and successfully implemented community-based outreach programs to heighten pediatric and ER market share.
- Established community education program that strengthened product line revenues and physician referrals.

***MAGGI JONES PUBLIC RELATIONS**, Houston, TX

Account Executive (9/92 to 9/93)

Summary: Assisted with the execution of public relations plans encompassing media relations, event publicity and promotions for accounts including: Billy Blues Barbecue, Kick Drugs Out of America Foundation, KRTS/KRTK-FM, Omni Houston Hotel, Ruggles Grill and Tiffany & Co.

***PRISCILLA LARSON & ASSOCIATES**, Houston, TX

Event/Project Coordinator (9/92 to 9/93)

Summary: Assisted in all aspects of the development, planning and execution of events benefiting non-profit organizations including: Sister Cities International, Texas Institute for Arts in Education, Contemporary Arts Museum and Casa de Esperanza de los Ninos.

HOUSTON BALLET, Houston, TX

Marketing, Ticket Promotions Internship (Summer 1991)

Summary: Assisted sales and promotions manager with marketing promotions.

***Worked positions concurrently in same office.**

Education

TEXAS A&M UNIVERSITY, College Station, TX

Bachelor of Science in Journalism, May 1992

Minor: Marketing, Sociology

International Study Abroad Program, Italy, Summer 1990

Dale Carnegie Course, August 1997

Professional Activities/Memberships

Child Advocates, Inc., Houston, Texas (CASA)

Board of Directors, 1997

Chair, Young Professionals for Children, 1997

Junior Achievement Volunteer

Junior League of Austin

Sustainer, 2011-current

Mobile Loaves & Fishes Project Chair, 2009-2010

Chair, In-League Special Events, 2004—2005

Member, 2000 – 2011

Shepherd of the Hills Presbyterian Preschool

Board Member, 2008-2010

St. John Neumann Catholic Church

VBS Chair, 2011



Bergan Norris Casey has almost 20 years experience managing public relations/public affairs, information campaigns and other communication strategies. Currently, Casey provides freelance services to non-profit organizations and small businesses. Her clients include the Headliners Foundation of Texas, Texas Cultural Trust Council (host of the *Texas Medal of the Arts Awards*), Texas Coalition for Conservation, Retreat at Candlelight Ranch, Greenlights for Nonprofit Success, Shoes for Austin, Austin Community Foundation, People's Community Clinic and Mobile Loaves & Fishes. She provides media relations, event planning, communication and development strategies, collateral materials and grant writing services.

Previously an account executive at Christian-Hubble Media & Communications, Austin, Casey managed accounts that included Scott & White, Texas Parks & Wildlife Department, Hire.com, FORTUNE 500, Texas Hill Country Wine & Food Festival, Texas Good Roads & Transportation Association and IC²-University of Texas.

Casey is a 1990 graduate of the University of Texas at Austin with a degree in Advertising. She later received her Master of Public Affairs degree from the LBJ School of Public Affairs. Immediately following graduate school, Casey worked for the Office of the City Auditor where she developed process improvements for City departments.

Prior to graduate school, Casey worked for two years as an account executive in the public affairs division of Rowland Worldwide, London. Her primary client was a British telecommunications regulatory agency. She later spent three years with Selz Seabolt Communications, Inc. in Washington, D.C., where she organized Congressional briefings and other legislative activities for private, non-profit, and government accounts such as ENSERCH Corporation, National Organization on Disability, America's Charities and the U.S. Department of Labor.

Casey volunteers for organizations she believes are making a direct impact on people's lives. These include political campaigns at the federal, state and local levels, and service organizations such as The Junior League of Austin, Planned Parenthood of the Texas Capital Area, LBJ Library Future Forum the Heritage Society of Austin. She and her husband have a vivacious seven-year-old daughter. **References available upon request.**

KORI M. GOUGH
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korigough1@yahoo.com

EDUCATION

UNIVERSITY OF TEXAS AT AUSTIN, Austin, Texas
Bachelor of Arts in History and Economics, 1991

ACCOMPLISHMENTS

SEEDS FOR CHANGE CONSULTING, LLC, Austin, Texas

1/2007 – Present: *Event Planning and Board Development*. Work with the SFCC team and a variety of nonprofit organizations to plan, organize and execute all aspects of fundraising events.

- Since fall 2009, lead event planner for Interfaith Education Fund for more than twenty local, state and national conferences, workshops and meetings per year. Coordinate hotel logistics, space and A/V requirements, rooming lists, special requests, and other critical details to make the events run smoothly and efficiently.
- While planning the Greenlights Crossroads Conference, increased exhibitor participation and revenue by over 50% over two years and decreased the expenses by over \$4,000.
- Helped the Moore-Weis Gala realize it's first sold out gala and increased revenue for both auction and "paddles up" activities.
- Worked with organizations to establish a realistic and beneficial Development Plan that best fits their mission and development needs.

PR/MARKETING CONSULTANT, Austin, Texas

8/2004 – 10/2009: *Marketing Director, Elle Boutique*. Developed several PR tools to generate additional clients for the boutique.

- Events Calendar – solicited retailers to sponsor each month and collected all special event dates to put in the calendar. This calendar was used as a mass mailing tool to introduce the public to the clothing and accessories lines we carry at the store.
- JLA A Christmas Affair- Assembled and submitted the application, pictures, product samples for an ACA merchant booth. We were accepted as a new booth, which resulted in sales boost, as well as product recognition for the store.
- Special Events – Handled all special events (fashion shows, luncheons) and donation requests for the store.

1/2006 – 12/2008: *City Lead, Savvy Source for Parents*. Savvy Source is a website developed to provide parents with a comprehensive and detailed overview of preschools in cities across America. As City Lead, I worked with a group of 10 "Mavens" to compile and input information on over 200 preschools in the Austin

area. The website went live in 2006 with the Austin preschools. Increased traffic over the two years, increased the number of preschool listings and banner advertisers.

8/2004 – 8/2005: *Development, Austin Film Festival*. Work with the *Austin Film Festival* committee to raise funds for their ongoing events with an emphasis on the two week festival in October.

AMERICAN HEART ASSOCIATION, Austin, Texas

4/1999 – 4/2004: *Gala Director*. Responsible for all fundraising, auction and logistics for the gala events in the Austin area. Also, worked closely with the other fundraising events, *American Heart Walk* and *Jump Rope for Heart*, within the *Capital Area Division*. Communicated directly with the *Capital Area Division* Board of Directors.

- Increased Net Revenue by 130% the first year as *Gala Director* for the *Austin Heart Ball*, and continued a 25% increase each of the following 4 years.
- Developed the *Cardiac Care Provider of the Year Award* in 1999. This patient based nomination award was established to bring media recognition to our event.
- Through continuous cultivation, maintained a very high percentage of repeat attendees for the *Heart Ball*.
- Worked directly with volunteers to set up and attend corporate solicitations. Preparation for these meetings included creating individualized proposals.
- In May 2001, inherited responsibility for the annual Williamson County Gala. In the first year as director, the Net Revenue increased by 45%.
- Responsible for obtaining and organizing live auction, silent auction and raffle items for all gala events.
- Worked directly with two gala committees, as well as with numerous sub-committees. Met regularly with volunteers to help maintain effective communication and motivation.
- Worked closely with each chairperson to recruit qualified committee members each year and to find the best sub-committee fit for each one.

EL PASO MARRIOTT HOTEL, El Paso, Texas

1993 – 1997: *Catering Manager*. Responsible for booking both social and business related catering events. Dealt directly with meeting planners to coordinate all of the details for their functions. Also, worked with Marriott personnel to ensure that all events ran according to planned specifications.

- Responsible for all the high revenue events in the Hotel.
- Responsible for the majority of off site events.
- Within three months of initial hiring, surpassed catering booking sales record for the El Paso Marriott Hotel.
- Maintained a 30% increase in catering booking goals each year.
- Responsible for bringing in dozens of new, very high profile accounts each year.

- Recognized by JW Marriott for Outstanding Customer Service.
- Developed a Recycling Program for the over 250 employees.
- Developed a monthly Manager Appreciation Program.

COMMUNITY ACTIVITIES

- Cancer for College – Will Farrell Celebrity Golf Tournament
2010, 2011 Committee Member
- Partnerships For Austin Children in Crisis
2005-2008 Board Member, *Development Chair*
Established the current Development Plan and Chaired the 1st
Annual Gala 4/2006
2008- 2011 Board Chair
- Kiker Elementary
2007-2009 CAC Board Member
- Westlake Hills Presbyterian Preschool
2004-2005 Board of Directors
2004 *Holiday Collectibles* Auction Co-Chair
- Junior League of Austin
2007-2008 Marketing Chair for Cookbook Committee
2006-2007 *Capitalines* Ad Sales Chair
2004-2006 *Capitalines* Head Writer
2002 *A Christmas Affair* Ad Sales Co-Chair
1998-2001 Various Community Placements
1997 *A Christmas Affair* Parties Chairman
- Junior League of El Paso, Inc.
1996 *Christmas Fair* Special Events Chairman
1995 *Christmas in April* Logistics Chairman
- American Heart Association, El Paso, Texas
1997 *Hearts of Gold Gala* Chairman (first sold out event)
- American Heart Association, Austin, Texas
1998 *Heartbeat Gala* Chairman
- Children’s Miracle Network, El Paso, Texas
1994-1997 Steering Committee Board Member
1994 and 1995 “*Kidsville*” *Casino Night* Chairman

AUGUST W. HARRIS III

512.320.8808

harris@cfs-texas.com

Skills:

Board Chair & Service	Account Management	Troubleshooting	Real Estate & Real Estate Law
Government & Public Relations	Business Development	Issue Synthesis	Facility Management & Leases
City, County, State Issues	Contract Administration	Applied Knowledge	Credit & Debt Transactions
Policy Development	Debt Negotiation	Decision Making	Writing & Speech Writing
Arbitration / Mediation	Contract Negotiation	Project Development	Technical/Customer Service
Collaboration & Consensus	Project Management	Strategic Partnerships	MS Office
Corporate Philanthropy	Risk Management	Banking Relations	Management Reporting

Achievements:

- 25 + years of civic leadership, community service & involvement including service on the boards of several nonprofit organizations & chairmanship of high level committees & significant fundraising events.
 - Leadership roles in numerous organizations
 - 2007 Chamber Volunteer of the Year for Government Relations
 - Successful advocacy in transportation, land use & development issues, & historic preservation
 - Successful fundraising & donor development
- 11 + years owning, managing & operating successful B2B service related businesses.
 - 2005 Bronze Award for new business development
 - Strong year over year revenue growth
 - Numerous recommendations & testimonials
- 13 + years of experience in increasingly responsible positions providing asset management expertise & negotiation of complex contracts & leases; management of vendors, contractors & staff; intensive work in a legal environment, in-depth financial analysis of real estate related transactions; management & oversight of all aspects related to distressed & performing real estate loans; & management of commercial, multi-family & residential real estate; extensive value analysis & appraisal review; negotiated settlements & foreclosures.
 - Commendation for distinguished service
 - Successful management & liquidation of challenging loan portfolios through the United States including economically challenged & socially distressed communities.
 - Project specialist & team lead
- Historic home featured in *Austin Magazine* & HGTV's Old Homes Restored
- State certified mediator

History:
Professional Experience:

- January, 2003 to Present** President, Covenant Financial Solutions LLC, Austin, Texas.
 Launched merchant services firm offering an array of services to businesses of all sizes & types. Responsible for sales, client development & relationship management, back office operations & other tasks as necessary for a growing & profitable business. Currently the preferred provider for two statewide trade associations.
- October, 2011 to Present** Consultant, Seeds for Change Consulting LLC, Austin, Texas.
 Provides clients with strategic consulting in major giving campaigns, financial management and government relations.
- January, 2002 to January, 2003** Vice President & Chief Operating Officer, Fidelity Bankcard Services, Inc. Austin, Texas.
 Established & was responsible for all operational activities for new merchant services firm. Negotiated contracts & leases, maintained all corporate & client records, managed all accounting responsibilities, created prospect tracking processes, managed all client relationships, prepared major client proposals, & participated in business development.
- February, 1999 to December, 2001** Director of Business Development & Commercial Portfolio Manager, Quantum Capital, Inc., Austin, Texas.
 Developed new business prospects at the institutional & small firm level, reinvigorated existing client bases, created tracking processes, negotiated services & contracts & managed client relationships. Evaluated loan pools for acquisition. Managed multimillion-dollar portfolio of nonperforming commercial loans & judgments.
- August, 1997 to February, 1999** Banking & Real Estate Consultant, Independent, Austin, Texas.
 Performed real estate investment analysis, due diligence & Compliance audits, loan & OREO portfolio reviews, LIHTC & bond financed project reviews, underwriting audits, HMDA reviews, servicing transfer reviews & conventional, B & C underwriting.
- August, 1991 to July, 1997** Real Estate Portfolio Manager,(Contract), National Credit Union Administration, Austin, Texas.
 As Property Manager, managed multimillion dollar portfolio of commercial Class A office space, mixed use & multi family properties. Responsibilities included complex contract & lease negotiations, operational management, vendor solicitation & oversight, tenant contact, collection & eviction, & planning. Prepared extensive profit & loss & feasibility analysis on the operation of properties with the consideration of various objectives. Prepared operating budgets. As Portfolio Manager, managed multi million dollar national performing & non performing commercial & residential real estate loan portfolio, multi million dollar commercial & residential real estate owned portfolio. Supervised attorneys, subcontractors & brokers. Managed several bulk sales of loans. Examined & valued loan portfolios. Made recommendations on policies & procedures for both in-house parties & federally supervised financial institutions. Analyzed appraisals. Supervised staff on site & off site. Performed extensive profit & loss analysis & credit analysis of borrowers to determine feasibility of negotiations.

- Education:** The University of Texas at Austin.
Bachelor of Arts: Economics with concentrations in History & Business.
The University of Texas School of Law's Center for Public Policy Dispute Resolution.
Texas state certified mediator.
- Community & Philanthropic Activities:** Leadership Austin: Board 2011-2013; Chair Endowments; 2008 Essentials, Co-Chair 2011 Best Party Ever; Chair, Endowments Greater Austin Chamber of Commerce: 2007 Volunteer of the Year for Governmental Affairs; Chair – 2010 Local Issues Committee; Chair – 2009 Transportation Committee, Chair – 2008 Small Business Public Policy Forum; Chair - 2007 Public Policy Roundtable; Federal Issues Committee; Downtown Circulator Task Force, Freight Rail Task Force, Transit Rail Task Force; West Austin Neighborhood Group – President 2008-2012; Austin High Continuing Education Foundation: President 2010-2012; Heritage Society of Austin – Vice President 2010-2012, Advocacy Chair 2010-2011; MoPac Neighborhood Associations – President 2010-2012; National Trust for Historic Preservation; Texas Ex Students Association; Austin Museum of Art: La Dolce Vida Volunteer
- Prior Activities:** Texas School for the Deaf Foundation: Treasurer; Nature Conservancy of Texas: GenC Steering Committee; Alliance for Public Transportation: Steering Committee; Austin Texas Exes: Board; Lady Bird Johnson Wild Flower Center; Event Chair

PAULA KOTHMANN

(512) 470.2405 paula.kothmann@gmail.com

SUMMARY

Energetic, highly trained development professional with twelve years of broad experience in fundraising with an emphasis on frequent events.

QUALIFICATIONS

Twelve years at The University of Texas at Austin, managing fundraising programs, planning capital campaigns, writing grants, planning events, and cultivating constituents
Eleven years volunteering at Austin Lyric Opera, contributing to strategic plans, executing special events, organizing volunteers, leading outreach efforts, marketing, and other functions
Nineteen years in higher education, collaborating with researchers in grant writing

EDUCATION

M.A., The University of Texas at Austin, plus coursework in philanthropy (GPA 3.8)

B.A., Trinity University

C.F.R.E. (Certified Fund Raising Executive)

Professional development, marketing, fund-raising management, publishing, and Web design

Fundraising seminars, grant writing, capital campaigns, board development, planned giving

Study abroad, over 60 hours, Leopold-Franzens-Universitaet Innsbruck, Oesterreich (Austria)

Foreign-language training, German, Spanish

EXPERIENCE

ADVISOR

Austin Lyric Opera Guild Advisory Board (1999-present)

- Support the mission through fundraising and audience cultivation.
- Facilitate partnerships with other cultural organizations.
- Served as Vice President for Volunteers and for Audience Development.
- Co-chaired several large evening development and marketing events.
- Marketed performances to new audiences and organized groups of attendees.
- Collaborated with special-interest groups to help fulfill their missions, including: Triangle on Stage, Operators, Aria, and La Noche de Opera.
- Wrote articles publicizing performances.

ADVISOR/ INTERIM DEVELOPMENT DIRECTOR

Austin Museum of Art (2010-present)

- Cultivate supporters and audiences. Re-engage former volunteer leaders.
- Facilitate connections amongst cultural activists. Advise Development Committee.
- Plan events for maximal impact. Solicit corporate underwriting.
- Maintain donor confidentiality.
- Served as Interim Development Director March-May 2011. Managed department.
- Wrote an integrated development plan and specific strategies for various prospects.
- Successfully identified, cultivated, and stewarded major donors.
- Wrote and researched grants in close collaboration with diverse staff.
- Engaged in face-to-face cultivation contacts with over 25 prospects per month.

PROGRAMS AND DEVELOPMENT MANAGER

The University of Texas at Austin (2008-2011)

Humanities Institute

- Wrote and implemented a development plan in support of the institute's strategic plan.
- Managed development initiatives, publications, and events. Initiated online giving.
- Produced frequent events. Collaborated with partners on and off campus.
- Ensured compliance for a Ford Foundation grant of \$100K. Stewarded officers.
- Performed prospect research from various sources, including individual interviews.
- Cultivated partnerships that enhanced visibility. Collaborated with media.
- Managed a large portfolio of prospects. Documented donor contacts in the database.
- Deepened constituent relations through customized stewardship initiatives.
- Initiated and developed collateral materials for multiple programs.
- Thoroughly documented donor contacts in the database. Analyzed donor data.
- Achieved major fundraising goals. Creatively pursued new fundraising sources.

DEVELOPMENT ASSOCIATE

The University of Texas at Austin (2006-2008)

Office of the Vice President for Development

- Served as a liaison between Central Development and other campus entities.
- Taught campus development officers foundation research and recording in databases.
- Researched donors, using Foundation Directory Online, Alumni Finder, Hoover's,

PAULA KOTHMANN

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PUBLICATIONS EDITOR/ DEVELOPMENT ASSOCIATE

business journals, and other resources. Probed multiple sources to confirm data. .

- Wrote guidelines and taught other development professionals to maximize database.
- Maintained confidentiality of donor information.

The University of Texas at Austin (1999-2006)
Cockrell School of Engineering
DEVELOPMENT/CORPORATE RELATIONS
Managed fundraising programs.

- As part of a team, secured and stewarded foundation support of over \$3.7 million.
- Worked closely with advisory boards and foundation trustees. Planned meetings.
- Planned, marketed, and executed large events. Managed multiple concurrent projects.
- Served on the Communications Task Force with trustees. Implemented its ideas.

Served as assistant director (working title) of the annual-giving program.

- Designed strategic plans and administered fundraising campaigns. Tracked progress.
- Co-supervised over 40 workers.
- Solicited corporate cash and in-kind donations.

COMMUNICATION/MARKETING
Produced marketing and public-relations publications for broad, international audiences:
Calendar postings for events, CD-ROMs, proceedings, proposals, research summaries,
newsletters, Web site, announcements, postcards, and press releases. Edited reports.

- Cut publication expenditures by 50% from previous year; increased audience.
- Initiated relationships with national magazines to publish public-relations articles.
- Collaborated on communication strategies with a task force of foundation trustees.

ADMINISTRATIVE

- Negotiated favorable contracts for events, adhering to UT rules and procedures.

ARTS COLUMNIST/ WRITER

Downtown Planet, InMagazine, Rare Magazine, Austin, Texas (2002-2008)
Regularly wrote stories on the performing and visual arts.

- Met frequent deadlines.
- Interviewed experts, community leaders, and artists.
- Covered arts news.

Expanded readership.
Cultivated advertisers.

LANGUAGE CONSULTANT

Academic Translations and Language Consulting (1989-present)
Edit reports, contracts, and proposals.
Researched and edited grant proposals.
Edited and translated documents for academic and industry researchers.

- Published in major journals (e.g. *The Lancet*).
- Specialized in texts for medicine, the arts, the sciences, and tourism.
- Directed marketing for a laboratory. Executed strategic cold calls.

COORDINATOR/ INSTRUCTOR

Innsbruck International School, Innsbruck, Austria (1987-1989)
Managed department.
Instructed English, journalism, history, drama, ballet, and politics. Made oral presentations.
Planned international art excursions.
Advised international businessmen in communication.

COMPUTER SKILLS

Quark Xpress, PhotoShop, Microsoft Office Suite, donor relations software, databases

VOLUNTEER EXPERIENCE

Long Center for the Performing Arts Catalyst 8 Leadership Council, Volunteer Coordinator
The University of Texas alumni group Texas Exes, Events and Membership Committees
Blanton Museum of Art, Austin Symphony Orchestra, Umlauf Sculpture Gardens & Museum,
and the Sarah and Ernest Butler Opera Center

PROFESSIONAL AFFILIATIONS

Association of Fundraising Professionals, Program and Outreach Committees
Certified Fund Raising Executives
National Association of Science Writers (formerly)

PAULA KOTHMANN

(512) 470.2405 paula.kothmann@gmail.com

HONORS

Association of Fundraising Professionals scholarship recipient
Representative of Texas in a Germany/Texas Teacher Exchange Program (Berlin)

STEPHANIE J. LIMB

Education: George Washington University, MA in Philosophy and Public Policy (1997)
University Policy Studies Fellowship 1995-1997

Yale University, BA in Philosophy (1994)
President and Fellows of Yale University Commendation for Leadership in the Service of the New Haven Community, 1994

Professional Background:

Consultant, Seeds for Change Consulting, Austin, TX (2010-present)

Responsible for charity compliance, policy research and writing, and all aspects of grant strategies, from prospecting and proposal ideation to application and report submission.

Medicaid Consultant, National Association of Children's Hospitals and Related Institutions (Office of Medicaid and State Policy Analysis), Alexandria, VA (2007-present)

Responsible for tracking state legislation of interest to NACHRI's members; preparing summaries of regulations and resources; and conducting case studies of innovative hospitals.

Financing Policy Director, National Alliance to Advance Adolescent Health and Maternal and Child Health Policy Research Center, Washington, DC (1999-2010)

Responsibilities included:

- tracking and conducting analyses of Medicaid and CHIP federal and state legislation, policies, regulations, and managed care contracts;
- developing survey instruments;
- conducting telephone interviews with state Medicaid, CHIP, and Title V staff;
- evaluating programs through site visits;
- managing and analyzing data;
- generating new proposals to improve adolescent health care coverage; and
- writing reports, fact sheets, peer-reviewed articles and other publications.

Associate Editor, *Healthcare Trends Report*
Bethesda, MD (1997-1999)

Languages: Conversational Spanish

Publications

“Ensuring Financial Access to Hearing Aids for Infants and Young Children,” *Pediatrics*, 2010; 126 Suppl 1:S43-51 Stephanie J. Limb, Margaret A. McManus, Harriette B. Fox, Karl White, Irene Forsman

“New Workforce, Practice, and Payment Reforms Essential for Improving Access to Pediatric Subspecialty Care Within the Medical Home,” *Archives of Pediatric and Adolescent Medicine*, 2009; 163, 200-02 Harriette B. Fox, Margaret A. McManus, Stephanie J. Limb, et al.

Structuring Health Reform to Work for Adolescents, November 2008
Harriette B. Fox, Margaret A. McManus, Stephanie J. Limb, and John J. Schlitt

State Policies Affecting the Assurance of Confidential Health Care for Adolescents, April 2008
Harriette B. Fox and Stephanie J. Limb

The Public Health Insurance Cliff for Older Adolescents, April 2007
Harriette B. Fox and Stephanie J. Limb

Preliminary Thoughts on Restructuring Medicaid to Promote Adolescent Health, January 2007
Harriette B. Fox, Stephanie J. Limb, and Margaret A. McManus

Assuring Financial Access to Hearing Aids for Infants and Young Children, June 2006
Stephanie J. Limb, Margaret A. McManus, and Harriette B. Fox

States' Use of Medicaid Options for Expanding Children's Eligibility, May 2005
Harriette B. Fox and Stephanie J. Limb

An Analysis of States' Capitation Methods and Pediatric Rates, 1997-2003, February 2005
Harriette B. Fox, Stephanie J. Limb, Margaret A. McManus, and Ruti G. Levtoy.

Children Not the Target of Major Medicaid Cuts but Still Affected by States' Fiscal Decisions, June 2004
Harriette B. Fox, Stephanie J. Limb, Ruti G. Levtoy, and Margaret A. McManus

SCHIP Programs More Likely to Increase Children's Cost Sharing than Reduce Their Eligibility or Benefits to Control Costs, April 2004
Harriette B. Fox and Stephanie J. Limb

“Early Assessments of SCHIP's Effect on Access to Care for Adolescents,” *Journal of Adolescent Health*, 2003; 32: 40-52
Harriette B. Fox, Margaret A. McManus, and Stephanie J. Limb

Separate SCHIP Programs: Generous Coverage for Children with Special Needs in Most States, October 2003
Harriette B. Fox, Stephanie J. Limb, and Margaret A. McManus

State SCHIP Requirements and Innovations for Children with Special Health Care Needs, September 2002
Harriette B. Fox, Stephanie J. Limb, and Margaret A. McManus

Pediatric Provider Capacity for Children with Special Health Care Needs: Results from a National Survey of State Title V Directors, March 2001

Stephanie J. Limb, Margaret A. McManus, and Harriette B. Fox

Access to Care for SCHIP Adolescents, December 2000

Harriette B. Fox, Margaret A. McManus, and Stephanie J. Limb

Access to Care for SCHIP Children with Special Health Needs, December 2000

Harriette B. Fox, Margaret A. McManus, and Stephanie J. Limb

An Analysis of States' Medicaid Managed Care Plan Arrangements and Service Requirements Affecting Children 1995-1999, April 2000

Harriette B. Fox, Stephanie J. Limb, Christine Y. Chen, and Margaret S. Hayden

An Examination of State Medicaid Financing Arrangements for Early Childhood Development Services. *Maternal and Child Health Journal*, 2000; 4: 19-27

Harriette B. Fox, Margaret A. McManus, and Stephanie J. Limb

Summary

A grant professional with ten years experience in successful proposal development, grants management, and reporting. Skill set includes strong analytical, problem-solving, and organizational skills. Strengths include a solid track record of consistent achievement, knowledge of philanthropic community and a passion for developing non-profit funding strategies allowing organizations to meet their mission and strategic priorities.

Expertise

- Prospect Research
- Grant Writing
- Grant Management & Reporting
- Foundation & Community Relations
- Budgeting & Fiscal Management
- Program Evaluation
- Systems, Processes & Best Operating Practices

Experience

Grants Consultant, Austin, Texas

January 2004 – Present

- Written over 150 successful program specific and general operating proposals for private and government funding.
- Conduct prospect research and evaluation of potential funding opportunities; provide fundraising strategies for funding goals up to \$1,000,000.
- Development and management of grants calendar, including monitoring application deadlines, reporting deadlines, and pending grant amounts.
- Coordination with program staff in developing evaluation and outcome measurements and program budgets.
- Prepare grant reports for funders, including developing processes for capturing and reporting on metrics, successes, and financials.
- Joined Seeds for Change Consulting, LLC in 2010 as a professional grants program expert

Lance Armstrong Foundation, Austin, Texas

Grants Manager

December 2007 – June 2010

- Established processes to manage \$1.2 million in annual federal grant awards including proposal development, budget preparations, compliance and reporting.
- Developed and reviewed grant solicitation proposals and budgets for programmatic initiatives.
- Created processes and infrastructure to manage growth of grant-making portfolio from \$2 million annually to \$14 million annually.
- Lead staff member for compliance and management of combined grant-making portfolio of \$50 million, distributed to over 500 grantees, domestic and international.
- Reviewed and approved grantee proposals and scope of work for consistency and appropriateness to meet stated goals; provided technical assistance to grant applicants in budget preparation and program planning.
- Ensured that the Foundation's grant activities were in compliance with industry best-practices, legal and IRS requirements; advised and trained team members accordingly.
- Executed grant contracts and maintained standard terms and conditions.
- Created organization-wide dashboard and strategic assessment tool combining financial and programmatic metrics; implemented online software for greater efficiency.
- Advised staff on department budget preparations; made recommendations based on historical data and assessment of future needs, prepared financial reports and monitored program spending.

Lance Armstrong Foundation, Austin, Texas

Grants Officer

May 2004 – December 2007

- Defined grant-making strategies and requests for proposals to achieve targeted grantee outcomes.
- Created reporting templates and evaluate grantee reports to ensure program completion and accurate financial expenditures.
- Created and maintain terms and conditions for all grantees; translated these into internal policies and procedures for increased communication, efficiency and compliance.
- Created and maintain internal and external policies and procedures for grant application cycles.
- Implemented and maintain grants management database software and filing system.
- Supervised interns and Grants Coordinator until positions eliminated in 2006.

Texas Council on Family Violence, Austin, Texas

Grants Development Specialist

June 2002 – January 2004

- Wrote proposals for general operating funds and project support, securing over \$1 million in private funding and over \$4 million in government contracts.
- Successfully conducted prospect research, secured new donors and completed two challenge campaigns, exceeding fundraising goals.
- Created extensive case for support outlining two-year strategy and needs of agency, including development of project budgets.
- Prepared and submitted all reports and correspondence to private funders.
- Developed and maintained tracking system to manage grant portfolio, including donor database.
- Worked collaboratively with development team to organize and expand annual fundraising gala.

Bo's Pace, Houston Texas

Senior Development Assistant

May 2001 - June 2002

- Created fundraising plan and wrote proposals, securing \$2 million in private funding for general operating expenses, special projects, and Capital Campaign.
- Designed and wrote brochures, newsletters, website, and press releases.
- Organized annual fundraising events, increasing revenue by 25%.

Ronald McDonald House Charities, Austin Texas

Development Assistant

August 2000 – May 2001

- Assisted with planning and implementing 3 annual fundraisers.
- Managed Annual Fund and white mail solicitations.
- Maintained donor database.
- Conducted House tours for families, donors and members of the community.

Education, Memberships and Training

- Grant Professionals Association membership, 2010 - Present
- Presenter, Association of Public Health Professionals 2009 Annual Conference, “Developing Disaster Relief Rapid Response Funding Mechanisms”
- Grants Managers Network membership and Annual Training Conference, 2004-2009
- Presenter, Texas Council on Family Violence 2003 Annual Conference, “Grant Writing 101”
- Fundraising Management Certification, UT Continuing Education, Spring 2001
- St. Edward's University, Austin, Texas, Bachelor of Arts, Sociology, May 2000

Benita Trevino
(512) 301-8619
benitatrevino@yahoo.com

Highlights of Qualifications:

- Over 20 years experience in project management with highly successful results.
- Demonstrated ability to communicate effectively with customers, management, and volunteers.
- Assisted in the creation and management of budgets in excess of \$6M.
- Proven track record of savings through management to scope and budget.
- Certified PMI® Project Management Professional, PMP®

Employment:

Team Member, Seeds for Change Consulting, LLC – October 2007 to Present

Utilize project management skills within a development framework to best serve the firm's client needs.

- Lead project manager on several Austin and Texas client contracts: Texas Reach Out Ministries, Mid-Coast Family Services (Victoria), College Forward College Challenge 2010, 2011
- Team member of Seeds for Change event planning team for Greenlights for Non-Profit Success Crossroads Conferences 2007, 2008; Mobile Loaves & Fishes National Symposium on Homelessness 2010
- Team member of Moore-Weis Children's Center of Austin's annual benefit – event planning and project management; oversight of promotional video concept, scripting and production
- Graphic design support for Catholic Charities of Central Texas, Corporate Realty Austin, Partnerships for Children, FATE
- Responsible for firm oversight, Quicken and accounting functions, as well as database management and business development support.
- Support monthly firm networking events including recruiting speakers, facilitating several panel discussions and managing various administrative tasks.

Director of Volunteer Services, Seton Family of Hospitals – October 2005 to August 2007

Manage all aspects of an active hospital-based volunteer program, develop an active fundraising program and raise funds from the community to support the hospital.

- Coordinated and controlled the volunteer program on a daily basis including developing, expanding and sustaining a vibrant and dynamic hospital-based volunteer program. In this role, I increased the recruitment and retention of the new volunteers by 10% year-to-year.
- Responsible for planning, scheduling, and executing fundraising events, as well as developing new fundraising programs. Under my direction, a major holiday event was expanded and enhanced which increased gross revenue by 40%. While Director, the volunteer program has met or exceeded annual fundraising and volunteer program goals for 2 fiscal years.
- Identified and created new volunteer placements and supervised volunteer opportunities with hospital staff.
- Worked with the volunteer president and board on all volunteer activities, meetings and events including general meetings, executive committee meetings, service area meetings, budgets, fundraisers, promotions and communications.
- Managed all volunteer-driven retail projects for the hospital including serving as Gift Shop manager and managing the daily operations and staffing of the gift shop, training and scheduling of volunteers, inventory control, vendor sales and regular financial reporting.
- Represent the volunteer program to hospital staff and management and participate in hospital management team meetings/activities. Work with hospital staff on advocacy and strategic messaging.

Associate Project Manager-SWG, IBM – August 2003 to July 2005

Primary responsibility was to manage and drive improvements in the infrastructure in order to improve IT satisfaction for 28,000 IBM Software Group (SWG) employees.

Resume of Benita Trevino

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- Expanded the role and representation of SWG in IT Customer Satisfaction by teaming with SWG representatives to push through IT initiatives and sponsor projects deemed high priority to our users.
- Improved customer satisfaction survey results in all three areas of ownership year to year.
- Performed deep-dive analysis exercises on IT surveys results.
- Prioritized comments and worked with SWG tower leads to identify improvement initiatives working towards the next survey.
- Represented SWG on End User Assistance team which focused on help desk and deskside support projects, a key area of IT satisfaction.
- Coordinated and facilitated 3 roundtable focus groups to gain more in-depth feedback from end-users.
- Presented SWG IT Communication manager a calendar for future flash communications of Hints and Tips items which address dissatisfiers named in survey comments.

Technology Services Analyst, Tivoli Systems (division of IBM) - May 1998 to August 2003

Responsibilities focused on the management of 57 hardware and software service contracts for Tivoli Data Center and labs. Sole performer in this role.

- Through research, determined the standard level of service needed, the products to be included under support, and the critical machines which required an increased level of service.
- Provided all information regarding the desired product mix and service level agreements to the Purchasing department and assisted in negotiations regarding discounting, when required.
- Minimized the number of contracts when possible, guaranteed the contracts co-terminate, verified the support contacts were current, and confirmed any requested changes were processed.
- Ensured that a valid contract was in place or worked with IBM Purchasing to create a contractual agreement.
- Prepared estimates and forecasting for future budget purposes for lab and development managers.

Program Management Administrator, Reese Design Limited - February 1994 to April 1998

Responsible for the management of aircraft interior modification, construction, and installation projects.

- Successfully managed the completion of five aircraft and two helicopter projects. Aircraft completion projects are up to two years in scope and in excess of \$6M in budget.
- Interfaced with the modification contractor, Finance, and Design departments to finalize pricing for the customer, review the configuration of the aircraft, and ensure customer requirements were fulfilled. Modification contractors were located across the country.
- Responsible for the creation of project agreement, project plan and timeline.
- Assisted in the composition and distribution of the Completion Specifications outlining the architecture, material callouts, and technical systems for each project aircraft.
- Created tracking schedules and tools to oversee the status and completion of material approvals.
- Generated comprehensive reports for each project, which included the status of the product delivery schedule, quality mandates, engineering development, production progress, material and equipment purchases, and aircraft preservation and maintenance procedures.

Assistant, Charles E. Graham, III & Associates - March 1990 to February 1994

Assisted the president of an oil and gas consulting firm which specialized in litigation.

- Researched drilling and production activity at state agencies.
- Assisted with the organization of research used in oil and gas revenue analysis.
- Controlled accounts payable and receivable for consulting work and oil producing operations.
- Distributed revenue for six oil-producing operations to approximately 35 investors.
- Managed office and personnel functions.

Resume of Benita Trevino

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- **Program Manager, National Hispanic Institute - March 1989 to March 1990**

Project manager for a program designed to strengthen and "polish" ninth grade students' leadership skills.

- Successfully replicated program to two additional sites.
- Assisted in the development of partnerships with universities and colleges at the three host sites.
- Prepared annual program plans and budgets for review and approval.
- Created and distributed student manuals and newsletters.
- Responsible for planning, scheduling, and coordinating monthly student-training sessions in three sites across the state of Texas.
- Planned and administered annual statewide competition, including the recruitment and training of 17 additional staff and 25 volunteer members for this event.

- **Catalog Inventory Buyer, JCPenney Corporate Office - August 1988 to March 1989**

Responsible for forecasting sales and controlling inventory for product merchandise lines.

- Utilized software applications to research selling patterns and demand.
- Placed orders for merchandise with suppliers.
- Solved inventory problems by communicating with suppliers and distribution centers.

Education:

Bachelor of Business Administration, University of Texas at Austin - May 1988

Related Skills:

Power user for Microsoft Office suite
Microsoft Project
Microsoft Access
Adobe InDesign Suite
IBM Project Management Professional Accreditation Courses

Community Activities:

American Heart Association Heart Ball Committee, 2003 and 2004
Meals on Wheels Volunteer, 1998 to 2004
Mills PTA Directory Chair, 2008; Member 2009
Junior League of Austin, 2000 to Present
 Enrichment Committee Chair 2011
 Donor Development & Stewardship Committee 2009; Chair 2010
 Community Council Treasurer 2008-2009
 Bylaws Chair, Board of Directors 2007-2008
 Capitalines Chair 2007
 Marketing Council, 2006-2008
 Property Management Chair 2005
 Focus Area Researcher Member-at-Large 2004
 A Christmas Affair Children's Events Chair 2003, Merchant Logistics Chair 2002
Safeplace Leadership Events Council, 2004 and 2005
Theatre Action Project Board Member 2006 to 2010
 Vice-Chair, Board of Directors 2008, 2009
 Fundraising Chair 2007, 2008

Carlene Wegmann Todd

(c) 512-632-7862

cwegmann_11@yahoo.com

SUMMARY

A Marketing Executive with over 20 years experience managing sales and marketing efforts for diverse companies and industries. Demonstrated ability to maximize sales by executing online and offline marketing and merchandising strategies that support business and financial objectives. Increased online revenues by over 60 percent, managed online marketing programs that represented 50 percent of gross company income. Received President's award for largest increase over budget in sales and selling profit for 2003. Held management responsibility for 16 employees and over \$100 million in annual revenue.

- Strategic Planning
- Developing and executing sales growth strategies
- Project Management
- Working with cross-departmental and cross-functional teams
- Online and offline marketing and merchandising
- P & L Management
- High-level understanding of diverse range of web applications
- Creative Problem Solver

PROFESSIONAL EXPERIENCE

CONSULTANT, AUSTIN, TEXAS

8/2005 to Present

Seeds for Change Consulting, LLC

Seeds for Change Consulting is an Austin-based consulting firm providing full service, customized consulting to non-profit organizations in the areas of fundraising, events, writing and compliance.

- My client accounts include: Fostering Apprentice Training Enterprises (FATE), Narcolepsy Network, Restless Legs Syndrome Foundation, Texas Coalition to Abolish the Death Penalty, Texas Reach Out Ministries
- Project duties include: project management of online initiatives including website redesigns, online fundraising campaigns, multi-faceted communication plans, integrated strategies and web hosting services; support role as grant researcher and proposal writer

BSM Media, Pompano Beach, Florida

BSM Media is an internationally recognized full-service marketing and media firm that specializes in marketing to moms.

- My client accounts include – Hewlett-Packard, Precious Moments, Scholastic Books, Inc., Lands' End, Newbaby.com and BSM marketing and business development initiatives
- Project duties include - creating client proposals, developing and implementing a moms micro-site, online guerilla marketing campaigns, directing the site redesign of a new social networking site, executing nationwide sampling programs, market research, and creating and executing client and BSM Media email campaigns

Charity Dynamics, Austin, Texas

Charity Dynamics is a consulting agency focused on helping non-profits use online programs for communications, fundraising, and advocacy.

- My clients include – the ALS Association, American Cancer Society, The Arc of Texas, Chesapeake Bay Foundation, Partnerships for Children, Patient Privacy Rights Foundation, and KLRU Public Television
- Projects duties include – creating client proposals, business development, project manager for new website deployments, implementing monthly customized multi-chapter newsletter program, developing and implementing online marketing and fundraising plans, content and campaign planning and configuration in CMS systems, copywriting and content editing for clients, wrote best practice articles for Charity Dynamics and their strategic partners

AMERICAN ACHIEVEMENT CORPORATION (AAC), AUSTIN, TEXAS

7/2004 to 8/2005

Brand Director – ArtCarved

Responsible for the ArtCarved product lines for AAC, a \$300 million consumer brand company and largest domestic manufacturer of custom jewelry

- Managed all marketing functions for the national chain accounts, independent retailers, military and bowling channels
- Lead the ArtCarved team strategy including brand strategy, channel program development, creation of marketing and sales collateral, packaging, research, advertising, and product roadmap
- Worked directly with executive team to define financial and marketing strategies for the retail division
- Repositioned family jewelry business to reach unmet upscale opportunity
- Significantly reduced costs and streamlined marketing support to Independent Jeweler channel by introducing the first business to business ecommerce portal for the division

JCPENNEY.COM, PLANO, TEXAS

7/2003 to 7/2004

Divisional Merchandise Manager – Women’s Apparel, Accessories and Shoes

JCPenney.com is one of the largest online retailers in the US and is part of the Direct Division of JCPenney, Inc.

- Managed a team of 16 Online Merchandisers and administrative personnel responsible for sales, merchandising and marketing representing over \$100 million in revenue for JCPenney.com
- Achieved a 60% increase in sales FY 2003 vs. FY 2002, the largest increase of any other division and recognized with the President’s Award
- Increased multi-channel revenues by fostering cross-functional teamwork and aligning merchandise and marketing goals
- Drove record breaking sales increases through marketing tactics such as lifestyle shops, more intuitive navigation, targeted email promotions to our email database and affiliates and improved product images on the website

CONSULTANT, AUSTIN, TEXAS

2/2002 to 6/2003

The University of Texas, McDonald Observatory – Austin, Texas and Ft. Davis, Texas

Consultant – Online Marketing

- Developed and implemented a monthly online newsletter to increase membership, online gift shop sales and website visitor interaction.
- Collaborated on the design, content, and functional integration of 3 separate Observatory websites

Gift Shop Installation and Merchandising Project

- Developed fixture floor plans, product plan-a-grams, and window displays for the new McDonald Observatory Gift Shop
- Doubled the gift shop’s sales within 2 months of project completion

traq-wireless Inc. – Austin, Texas

Consultant – Direct Marketing and Lead Generation

- Developed and implemented a lead generation program using targeted email and direct mail for monthly industry Analysts’ webinars
- Managed and produced the monthly Analysts’ webinars

Sarah LeClere – Original Invitations and Stationery – Austin, Texas

Consultant – Marketing and Retail Channel Development

- Expanded distribution to the collegiate market and catalog market within 2 months
- Developed a pricing model for stationary products
- Secured national exposure in Better Homes and Gardens magazine - 5 million person readership

CONVIO, AUSTIN, TEXAS

4/2001 to 2/2002

Senior Consultant – Online Marketing and Development

Convio is the leading eCRM software provider for non-profits.

- Grew the consulting client base from 0 to 9 clients within 9 months. Clients included Planned Parenthood Federation of America, the ASPCA, KUHT – Houston PBS, Austin Children’s Museum and the Alley Theatre of Houston
- Developed and implemented integrated acquisition, conversion and retention marketing strategies aimed at increasing bottom line donation levels, driving site traffic and increasing communication. Results included increases in e-mail housefiles as high as 245%, increases in unique visitors as high as 65%, increases in online donations as high as +170% and response rates on e-mails as high as 30%.
- Wrote client case studies, online marketing articles and client focused marketing seminars on topics including email best practices, permission-based marketing, Web site usability, customer profiling and personalization strategies

- Responsible for creating and maintaining customer ROI tracking, campaign analysis and cost/ benefit reports using excel and Internal web reports
- Developed consulting collateral, including brochure and case studies

GARDEN.COM, AUSTIN, TEXAS

10/1999 to 11/2000

Senior Marketing Manager – Retention and Conversion Programs

Garden.com was an award winning online retail site selling garden products, home décor and gifts. The company closed in 2001.

- Managed and developed online and offline marketing programs for major eRetailer representing 50% of companies total revenue
- Responsible for development and coordination of all content and promotions for Garden.com’s direct mail and email campaigns which included: Shopper’s Preview, Bloom times, Garden Minder, Welcome email, one-off emails, reminder emails and one-to-one email campaigns
- Increased member sales 300% annually
- Developed personalization strategy for cross-sells / up sells for the site
- Increased sales yields an average of 35% using personalized emails using dynamic 1 to 1 content generation to targeted member segments
- Leveraged an analytics engine, RFMVT analysis, behavioral clusters, click-through data to create marketing segments and relevant promotions
- Managed, developed, and trained 2 Marketing Managers

POLO RALPH LAUREN FOR BOYS, CORPORATE OFFICE

3/1992 to 12/1998

Account Manager - San Francisco, California

- Exceeded annual sales goals by 31% and 32% in '97 and '98 respectively
- Managed major West Coast accounts (Macy’s, The Bon Marche, Liberty House, DFS) totaling \$10 million in revenue
- Responsible for executing Accounts’ budgeted inventory, sales and profitability goals
- Negotiated quarterly sales plans, inventory management procedures, and new product launches with Retail Management

Regional Retail Development Manager – Houston, Texas

- Responsible for the development, maintenance and strategic growth of major retail accounts based in the Texas, New Mexico, Nevada, Arizona, California and Washington territories
- Supervised, managed and trained 3 Merchandise Coordinators in key Western markets - 2 were promoted within 6 months

Merchandise Coordinator – Dallas, Texas

- Merchandised and trained Department Store management and Sales Associates in major Retail Polo Boys shops from Texas to California
- Established strong partnerships with each buying and management team through daily communication and regular face to face meetings

EDUCATION

University of Texas, Austin, Texas - 1987
Bachelor of Arts / History and Art History

COMPUTER SKILLS

MS Office, Adobe Photoshop, Adobe GoLive, Adobe Acrobat, A variety of CMS and eCRM technologies, WebTrends, Email Delivery systems such as Constant Contact