

SEASONED FINANCE EXECUTIVE & ADJUNCT FACULTY

Solution focused, multi-faceted Financial Planning and Analysis expert demonstrating expertise building management reporting solutions in challenging, competitive, and volatile markets. Proven financial systems and process improvement management and leadership skills in many industries using financial/operational management expertise across diverse organizations including manufacturing, television station and non-profit organizations, reinvigorating organizational infrastructure, inventory technologies, processes and financial management systems. Enthusiastic leader of staff and mentor to both young students as well as experienced accounting, finance and purchasing staff and non-finance and accounting working adults.

ADJUNCT FACULTY EXPERIENCE

SEATTLE UNIVERSITY, ONLINE MBA PROGRAM

2020 - PRESENT

CITY UNIVERSITY, BELLEVUE/TACOMA CAMPUS

2007-2010

Adjunct Faculty for both undergraduate and MBA Finance and Accounting classes, School of Business: introduction to accounting and finance, managerial accounting, Operations Management and intermediate financial management. Taught both hybrid and brick and mortar classes using Blackboard classroom.

UNIVERSITY OF PHOENIX, ONLINE FACULTY MEMBER

2008 – 2018

Undergraduate Accounting and Finance classes; over 100, 5-week sessions taught totaling over 1000 students. Blackboard Ultra Certified.

CORPORATE FINANCE/BOARD OF TRUSTEE TRAINING

2001 to Present

Finance for non-finance managers; financial statements and time value of money concepts.

CENTER FOR NONPROFIT LEARNING (<http://www.nonprofit-learn.org>)

2008-2009

Finance for non-finance executives, Seattle, WA

PROFESSIONAL CAREER SUMMARY

CFO Consultant, EZCFO2GO, LLC – Interim Controller , October 2021 to June 2022

CFO Consultant, EZCFO2GO, LLC – Interim CFO, October 2022 to March 2023

CFO Consultant, EZCFO2GO, LLC – Interim VP of Finance, June 2023 to May 2024

CFO Consultant, EZCFO2GO, LLC – Interim Controller/CFO, May 2024 to August 2024

Chief Financial Officer (CFO) – Charles Wright Academy, January 2021 to August 2021

VP of Finance and Operations – Make-A-Wish of Alaska and Washington, 2018-2021

Vice-President/CFO – Tacoma Community College, January 2016 to December 2017

Senior Finance Manager, Seattle University Facilities Services, October 2010 – January 2016

Finance Director/Senior Finance Officer, World Vision USA, September 2008-2009 (Downsizing)

- **Finance Manager**, World Vision, USA, Corporate FP&A, 2007-2008

Regional Controller/Finance Director, Fox Sports Net (FSN) – Northwest, 2005-2007 (Acquisition)

Director Finance, Canada, National Money Mart February 2005 to August 2005 (6-month contract)

Division FP&A Manager, Dreyer's Grand Ice Cream, Northwest HQ, 2002-2005 (Reorganization)

Director, Global, FP&A, Iomega Corporation, 1999-2001 (Global Downsizing)

- **Sr. Manager**, Business Forecasting, Iomega Corporation, 1997-1998

- **Manager**, Global Pricing, Iomega Corporation, 1997-1997

Manager, Marketing Analysis, Sea-Land Services (CSX), 1992-1997 (New position at Iomega)

- **Manager, Finance**, Sea-Land Services, 1992-1993

Senior Financial Analyst, The Boeing Company, 1985-1992 (New Position at Sea-Land)

CORE COMPETENCIES

Project Accounting Reporting & Analysis
Forecasting, Reporting and Analysis
Revenue, Profit and Market Share Growth
Strategic Planning, Execution and Management
Capital Budgeting Evaluations (IRR, NPV)
Systems Implementation Team Key Member
Hyperion Essbase and Planning Power User
Higher Education Purchasing, HR, A/P

Purchasing, HR, Payroll and Office Administration
Software/Hardware Analysis and Enhancement
Data Manipulation and Analysis using SQL
Staff Management and Performance Building
Business/Profitability Modeling and Analysis
Financial Planning Process and Systems Expert
COGNOS Analytics
ECM Processes and Systems Design

EDUCATION AND PROFESSIONAL AFFILIATIONS

Post-MBA Certificate in Accounting (completed, June 2014) – Seattle University; completed five graduate level accounting classes including: Tax, Audit, Intermediate I & II and Managerial Accounting

Masters of Business Administration (MBA), Seattle University, Seattle, Washington
Major: Financial Management/Economics/International Business/Law

Bachelor of Arts in Business Administration, University of Puget Sound, Tacoma, Washington
Major: Financial Management/Economics

Institute of Management Accountants (IMA) – CMA candidate.

PROFESSIONAL EXPERIENCE (DETAIL)

CHARLES WRIGHT ACADEMY – Tacoma, WA January 2021 - Present
Chief Financial Officer (CFO)

Direct all aspects of internal controls, budgeting, reporting, monthly board of trustee's presentations and other responsibilities as part of the Senior Leadership Team (SLT). Directly supervise the Controller and their A/P and A/R specialists. Focal point for all endowment/investments and banking relationships that are part of the short-term and long-term cash management for the school. Serve as the head of the Logistics Function of the School's Emergency Management Team.

MAKE-A-WISH ALASKA & WASHINGTON – Seattle WA 2018-2021
Vice-President of Finance & Operations (CFO/COO) (post-pandemic downsizing)

Direct all aspects of accounting, human resources, IT, Facilities and Risk Management. Member of Senior Leadership (Management) Team responsible for annual internal and external audits as well as leading preparation of annual operating and capital budget and presenting to the Board of Trustees. Total of seven staff reporting to me via 3 direct reports including the Senior Director of Information Services, the Chief Accountant as well as the Office/HR Manager

TACOMA COMMUNITY COLLEGE — Tacoma, WA January 2016 – December 2017
Vice-President for Administrative Services/CFO (President forced out by faculty)

Chief Financial Officer, Public Records Officer, Risk Management Officer for \$45-million-dollar business responsible for IT, Financial Services, Facilities and Auxiliary Services (Book Store/Food Services).

Direct all aspects of internal controls, budgeting, reporting, monthly board of trustee's presentations and other responsibilities as part of the President's Cabinet (PC). Responsible for all contracts and request for proposal

(RFP) development as part of the procurement/purchasing department. Directors of Facilities, Financial Services and IT as well as the Bookstore Manager report directly to this position. Responsible for over 45 total full time exempt and classified staff.

- **Process Improvement & Systems Implementation:** Focal point for all ctcLink (PeopleSoft) ERP implementation issues that helped improve the project management and communication with the State of Washington SBCTC Project Management team.
- **Annual Budgeting Process & Tools:** Redesigned new annual budget workflow process and tools and presented to the Board of Trustees for approval.
- **Committee Leadership:** Budget Committee, Operational Council, Facilities Committee, Sustainability Advisory Council, IT Committee, Food Service Selection Committee, Beverage Service Committee, Acquisition of Art Committee, Emergency Operations Committee
- **Incident Command Structure (ICS)** – developed new Emergency Operations Plan and ICS team structure for college campus that included my direct reports and leaders of all other major departments on campus.

SEATTLE UNIVERSITY – Seattle, WA

2010 – 2016

Facilities Finance Manager – Facilities Services Department

(Promotion to TCC)

Serve as the Chief Budget Officer (CBO) to the AVP (CEO) of Facilities Services in charge of \$17 million in operating expenses and up to \$50 million in capital expenses annually. Span of control includes 3 direct reports and up to 5 part-time students.

Direct all aspects of Accounts Payable, Purchasing, Payroll, Human Resources, Internal Controls, Capital Project Accounting Processes and Reporting Systems Development. Assisted Controller's office with annual auditing process for \$200 million in revenue and expenses; Developed new capital/construction project approval and close-out process and MS Access Database for tracking up to 100 projects per year.

- **Process Improvement & Systems Implementation:** Designed new process and systems for tracking internal Accounts Payable invoices using ECM (document imaging) and MS Access for tracking operating expense, planned maintenance and capital expense invoices and projects. Developed and built new capital projects database and procedures for initiating and tracking capital projects for Facilities.
- **Monthly Reporting Tool Development:** Built monthly financial reporting tool for all cost center managers to meet and review the remaining balances available by account, setting precedent that other departments can use on campus.
- **Committee Membership:** Budget Advisory Committee (BAC), Imaging Operations Group (IOG), Colleague Operations Group (COG), Major Financial Managers Group. Core Team member to AVP (CEO) of Facilities and his executive staff.

WORLD VISION-USA, Federal Way, Washington

2007 to 2009

Senior Finance Officer/Director of Finance

(Economic Downsizing)

Served as the CFO to the VP (CEO) of the Major Donor Fundraising Group supporting \$10 million operating budget with no direct reports.

- Developed daily, weekly and monthly fundraising reports for VP (CEO) of major donor fundraising group to aid in recalibrating the need for new donors and potential reductions in expenses.
- Assisted Controller's Office with annual auditing processes and procedures
- Used "Charity Navigator" website to analyze all "Four-Star" charitable organizations to compare expense ratios to World Vision and top fundraising organizations.
- Studied IRS Form 990's for multiple four star charities to better understand the cost drivers of their organizations to see what donors and "watchdogs" were looking for in the "best" charitable organization to donate to.

- Redesigned Corporate Cost Allocation Excel model to reduce cycle time preparation by 30 days per year. Identified telecommunications cost savings opportunity that led to cell phone and other phone related cost savings of over 38% per year.
- Implemented monthly finance status review meetings with all cost center managers in operating groups to improve internal controls and accountability within the organization.

FOX SPORTS NET (FSN)-NORTHWEST, Bellevue, Washington

2006 to 2007

Finance Director/Regional Controller

(Merger/Buyout)

Served as the Chief Financial Officer (CFO) to the GM/VP (CEO) of FSN-NW

Responsible for all HR, A/P, A/R, payroll, facilities maintenance and lease negotiations, financial planning, analysis, forecasting and reporting of all these operating areas encompassing over \$150MM in Affiliate and advertising revenue. Performed all IRR/NPV analysis on new team contracts.

- Implemented new management reporting system and monthly reviews with Senior Management Team that led to significant telecommunications cost savings and return of money from phone carriers for charges not owed.
- Developed strategic planning goals for new college and professional team cable network contracts within the Pacific Northwest (WA, OR, ID, MT) that led to new contracts with both cable networks and sports teams which led to the largest Major League Baseball (Mariners) contract at that time (\$2 billion over 17 years).

NATIONAL MONEY MART COMPANY, Victoria, BC, Canada

2005 to 2006

Director of Finance-Canada

(Contract Ended)

Served as the Chief Financial officer (CFO) for Canadian Operations in support of the Sr. VP (CEO) of Canadian Operations

Responsible for staff of 2 direct reports supporting all financial planning, analysis, forecasting, reporting and capital budgeting for all Canadian Operations encompassing over 300 stores in 5 market offices located in 7 provinces totaling over \$150MM in retail sales.

- Introduced Corporate Purchasing Card System to reduce cash usage in remote stores saving thousands of dollars per year and increasing cash flow.
- Implemented analytics using SQL server cubes to perform monthly variance reporting for Senior Management Committee as well as district sales offices.
- Instituted monthly rolling forecast process, which reduced expense and cash flow variance by 10% per month.

DREYER'S GRAND ICE CREAM, Kent, Washington

2002 to 2005

Division Financial Planning and Analysis Manager

(Reorganization)

Directed Northwest Division financial planning, analysis and reporting for 8 state region supporting 5 district offices in Anchorage, Seattle, Portland, Denver and Salt Lake City. Lease/Buy NPV analysis.

- Led and implemented initial quarterly financial forecast to 98% accuracy at EVA level; built several complex analytical models using Excel to do post-audits on sales promotion returns that led to increased rates of return for future in-store promotions with major grocery chains.

IOMEGA CORPORATION, Roy, Utah

1997 to 2001

Director, Corporate Financial Planning and Analysis

(Economic Downsizing)

Senior Manager, Business Forecasting,

Global Pricing Manager

Led analytical and finance systems staff in charge of worldwide financial planning and analysis process for CFO in charge of \$1.3 billion in revenue and over \$170 million in Net Income per annum of high-tech manufacturing organization building consumer products for the PC and Laptop industry.

- Focal point for annual strategic planning process and all internal audit reviews as liaison between the strategic planning team and the CFO.
- Led cost reduction initiatives by identifying over \$50 million in potential operating expense cuts.
- Reduced annual planning cycle time by 33%; improved annual planning process/systems grade by 25%.
- Designed and build first company wide rolling forecast process and system to provide real time monthly financial forecasts to CEO and Executive staff reducing quarterly labor costs by 70%.

SEA-LAND SERVICES, Charlotte, North Carolina/Seattle, WA

1992 to 1997

Finance Manager – Capital Assets

(New Position at Iomega)

Market Analysis Manager – Corporate Marketing

Led four senior market analysts and four junior market analysts in the development of annual strategic marketing plans for Atlantic, Pacific and Latin American trades; performed all market share and competitive analysis for major trade vice-presidents on a quarterly basis.

THE BOEING COMPANY, Seattle, WA

1985 to 1992

Senior Financial Analyst – Boeing Commercial Airplane Group, Fabrication Division

Developed Make/Buy white paper along with IRR/NPV models to support new investment analysis processes and procedures.

TECHNICAL SKILLS

Spreadsheet-Advanced Excel Modeling and Design (Pivot Tables, Reporting, Macro's/SQL) SASS/SPSS Statistical Model Integration; Advanced Analytics and Management Reporting using Hyperion and Cognos.

Database Management Systems (RDBMS) – Abila MIP, Oracle NetSuite; Blackbaud Financial Edge PeopleSoft /Oracle, JD Edwards, MS Access, Ellucian, Great Plains, and QuickBooks; FOCUS (4GL) report writing. MS Access database design and building; designed and built three databases to assist in real-time Operating Expense, Planned Maintenance Expense and Capital Project Expenses within the Facilities Services organization.

OLAP -Hyperion Essbase, Hyperion Planning Administrator (SQL editing), Cognos; Brio; Business Objects

COMMUNITY INVOLVEMENT

Cristo Rey Jesuit High School, Finance Committee Member – 2024 to present

Freely Given – Board Treasurer, 2023 to present

Seattle University Volunteer Day – Group Leader, 2014-15

Seattle University Staff Serving Youth Book Club, Bailey Gatzert Elementary, 2013/2014 academic year.

American Cancer Society Relay for Life-Team Captain-3 years (7-year survivor), Burien, WA

Finance Committee Chairman – All Saints Lutheran Church, 2007-2010

Finance Committee Chairman – Our Savior’s Lutheran Church, 1985-1990

VP Finance/Treasurer, Our Savior’s Lutheran Living Community (Real Estate Development), 1986-1988

Youth Soccer Coach, Tukwila Youth Soccer Association, 2002-2004

Youth Baseball Coach, Kent Recreation, Boys & Girls Clubs of Federal Way, 1993-94

Youth Baseball Coach, Mathews (NC) Recreation Association, 1995-97

Youth Soccer Coach, Mathews (NC) Recreation Association, 1995-97

Read & Lead – Youth in crisis volunteer – Charlotte, NC, 1995-97