

SUMMARY OF SKILLS AND QUALIFICATIONS

- Multi-faceted organizational management experience with over 20 years in serving the educational and non-profit community.
- Extensive experience in creating an excellent work environment leading to the recruitment & retention of exceptional staff members, developing cohesive, effective & companionate teams with very low turnover during periods of low unemployment.
- Excellent multi-organization financial management skills-great track record of “on-budget” or “ahead of budget” performance.
- Superb fundraising abilities - able to form and sustain strong relationships with governmental agencies, community organizations, corporate partners and individual donors. Well-versed in grant writing, planned giving, event planning and innovative funding mechanisms leading major mission impact as well as sustained fiscal viability.
- Strong commitment to community outreach/public speaking. Track record of collaboration in order to build fruitful coalitions, serve greater numbers & raise awareness of our population. Active in professional roundtables & local philanthropy groups.
- Great w/school & non-profit boards-able to increase engagement, build productive committees & raise financial commitments.
- Demonstrated unique ability to develop, design, deliver, manage, and evaluate innovative programs, meeting current and emerging needs of students and participants with varying abilities.
- Bilingual/Biliterate Spanish–English.

PROFESSIONAL EXPERIENCE

Director/Consultant
Prosper – For Your Non-Profit Solutions, San Jose, CA

2020 – present

Organizational Growth and Leadership Coaching:

- Work closely with executives and helping them develop leadership qualities and management skills.
- Plan and conduct mock interviews, meeting presentations, event speeches and guide on improving presentation skills.
- Teach and emphasize various aspects of non-profit corporate culture and demonstrating how to follow them.



- Expertly able to work with your team in career development, path design, recognition, etc.
- Assess current overview of succession planning and work with leadership on creating a strategy that works with both internal dynamics and external forces to optimize all resources.
- Proven record of effective change management - work with top management in diagnosing problems and setting goals, creating training programs to meet these goals, incorporating real life methods to enhance employee satisfaction and productivity.
- Partner with team leads to continuously improve leadership, management and organizational capabilities in order to accelerate execution against annual or multi-year objectives.
- Implement and oversee programs that strengthen employee knowledge and abilities, as well as improve leadership and the overall company health/culture.
- Prepare leadership development plans and ensure clients achieve their goals as planned. Train program, administration, accounting, fundraising and other personnel of different departments in gaining skills to influence others.
- Create, implement, sustain, and continuously improve effective communications across the organization and community.
- Responsible for drafting, revising and enhancing training materials.

Program Development:

- Design, plan, and oversee the implementation of the programmatic offerings, identify potential attendees, work closely with field experts, propose session objectives, as well as guide content delivery strategies.
- Organize and schedule meeting/conference, seminars, and other sponsored programs or events, including: arranging all logistics of programs and coordinating registration and maintaining participant databases and evaluations.
- Collect and analyze post-event or session evaluation survey results, presents feedback and makes recommendations to the leadership and other management staff to guide decision-making and support initiative implementation.

Advancement:

- Serve as a guiding member of a project management team providing direct client service ranging from the larger strategic issues such as campaigning to coaching clients in the day-to-day details of development office best practices.
- Develop guidelines and deadlines for all grant submissions that incorporating all details of the written proposal and acceptance letter received by grantor. This will include, but not be limited to, program development, marketing needs, form development, budgeting and cost projections, parent and caregiver contacts, etc. Also can teach and/or assist with the coordination of all aspects for final project implementation should it be desired. Emphasis placed on making grant goals, implementation procedures, and donor organizational systems that are easy to use and replicable.



- Proven ability to beat organizational records of grant funding received – able to consistently bring in four to five times what I cost in revenue. Upwards of \$300,000 a year for Via and \$250,000 a year for NAMI SMC.
- Able to translate the activities of non-profits into exciting, easy to approve, and executable proposals for potential funders.
- Create and distribute written communication to the stakeholders, via email, newsletters, website, brochures, etc. Written content to include: events, announcements, funding and scholarship opportunities, awards, resources and publications, etc.
- Provide recommendations for next steps in approaching operational plans and unique sources of funding.
- Research and update range of donors and funding opportunities from corporations, foundations, agencies and individuals.
- Understand how major stakeholders are thinking about the company's direction, generally and in reference to specific initiatives, through interviews with these stakeholders.
- Work alongside the executive team to define the pitch used in donor meetings; practice the pitch with the executives and help the management team preempt donor questions.
- Identify possible fundraising prospects as per project requirement and then work with team members to create fundraising tactics.
- Establish a guide/map of organizations, government agencies and business sector clients.
- Develop institutional capacity for marketing, targeted grant writing and individual donor cultivation.
- Define project objectives as well as coordinate search for support from businesses and individuals.
- Develop an understanding of the existing business (including products/services, customers, competitors, the overall market and trends) through careful research and analysis of all business units.
- Assist in the strategic planning and researching specializing in new funding prospects to support private, public, educational and even international programs.
- Serve as liaison to all funding agencies or organizations; maintain contact with funding organization during review of submitted proposals/grant applications.
- Manage grant fulfillment including writing acknowledgement letters, sending grant agreements and sponsorship packages to Donors.
- Strong at coordinating, capturing and synthesizing information from various stakeholders.

**Chief Executive Officer promotion from
VP of Programs/VW Director, Via Services Santa Clara, CA
(requested transition back to VP due to family commitments)**

2014 – 2021

Responsible for the day-to-day operations of the organization & for the achievement of the major strategic objectives in partnership w/a 22 member community based Board of Directors. Work proudly in partnership w/a dedicated leadership team supporting a staff of 32 FT positions as well as 260 seasonal staff members. Proud of building & maintaining strong relationships w/ local & regional special needs organizations, families, funders, community & political leaders. Grew organization to an annual operating budget of approximately \$6.2M w/healthy reserves. Programs expanded in both our Santa Clara headquarters & Cupertino Campus. Grew all areas including but not limited to, private pay fees, school districts, use groups, online donations, corporations & individuals. Major goals met included expanding diverse and accessible high-quality integrated services responsive to community needs, increased organizational profile by building a range of collaborations/partnerships, and diversified revenue streams by developing a plan to increase fund/brand awareness for current and prospective donors, foundations, and individuals.

***Increased numbers served from 1500 families to 4000 families
Grew organizational budget from \$2.5 million to \$6.2 million
Every year had a surplus or break even budget
Reduced turnover to 15% from 60% for year-long employees
and 28% for seasonal employees***

- Responsible for providing a credible & informed presence for Via by identifying & addressing critical issues effecting families with special needs. Developed new outreach channels to build effective relationships w/the community to attain information & work in a team fashion to build solutions. Built out Marketing & Community Relations departments quickly & effectively. Reformulated all deliverables with new branding, launched annual reports, and professional catalogs for all departments.
- Proudly built a fundraising plan that often exceeded but always met the \$850,000 to \$1M goal. Restructured a team which was raised grant funding from an average of \$80,000 annually to over \$375,000. Secured the most funds in Via's history in three areas - corporate/foundation grants, individual donations & event net revenue. Grew the annual gala from a net of \$90,000 to \$350,000 & increased attendance from 180 to 450 persons. Developed a comprehensive fund development plan that included online and social media giving platforms, friend/fundraising experiences, annual commitments & planned giving.
- Performed 1st merger/acquisition in 75 year history. It expanded service reach, fee for service revenue & campus utilization.
- Thoughtfully developed a climate that attracts, retains/motivates a high caliber of staff & board members leading to superb organizational performance. Led teams in expanding programs, updating HR practices, improving finance/acctg. measures,



developing reliable & efficient IT infrastructure, improving property/facility needs, & setting standards for contracts/legal matters.

- Responsible for developing planning process-short & long range organizational strategy/goals as well a continual quality improvement model ensuring that all programs & services are consistent with mission, values,& goals. Impact demonstrated yearly growth in numbers served, continuous program quality improvement, and minimal staff turnover.
- Worked w/Board of Directors to improve governance, policies/practices & bylaws. Attained new diverse members w/the essential skills to support the mission/vision of the organization. Focused group on unique ways to develop new revenue streams & while managing emerging organizational issues relevant to individual members' priorities. Grew board by 46%/board giving by 51%.

**Vice President of Programs promotion from
Via West Director, Via Services, Santa Clara, CA**

2011 – 2014

Provided leadership, direction, supervision & management of all Via Services' programs. Managed 2 major programs consisting of 3.8 million in revenue-early intervention for children 0 - 10 & a residential program for those with developmental disabilities from ages 5 to 90+. Duties included: program development/implementation; staff recruitment, hiring & training; budget development, fiscal management/control; risk management; strategic planning; financial development; & community involvement.

- Responsible for managing a FT staff of 6 directors/managers, 28 subordinates, 11 seasonal supervisors, & 200 seasonal counselors/operations members. Dramatically increased staff morale that led to improvement in retention & productivity.
- Created annual dept. budget of \$3.8 million, increased revenue 29% 1st yr, 23% 2nd yr & 21% 3rd yr. Conversely, decreased expenses—realizing great decrease in fiscal net loss. Overall loss dropped by 98% net loss 11/12 (-\$530,038), 13/14 (-8,000).
- Developed new curriculum to engage & challenge all participants. All activities, lessons, & outings allow participants to build relationships & develop other life skills reaching a greater level of independence at any level or age.
- Expanded reach to 1:1 participants by hiring qualified staff to provide a higher level of care to those with behavioral & medical challenges; created new programs—widened services SPED Science Camp, Adv.in Leadership, Travel Camp, etc. for 3:1 participants.
- Designed new budget categories & internal accounting rules leading to better departmental tracking & increased billable revenue.
- Worked extensively with First Step Director to make measurable inroads with budgeting and presentation skills - encouraged participation in executive leadership meetings to allow for greater program representation at the policy-making level.



- Improved overall customer satisfaction - 95% of surveys returned over 3 year period document 9 out of 10 in all categories.
- Negotiated new contract with Regional Center leading to \$250,000 in billable services that were previously uncollectable.
- Created and led marketing campaigns to grow market share by 30% in core programs as well as collateral programs - maximizing use of both our personnel and campus resources.
- Researched/wrote numerous grant proposals leading to an average of over \$230k annually in departmental dedicated funds used to underwrite operational expenses, improve current structures/equipment, & develop new modules & activities.
- Participated in all large grant proposals per year leading to solid improvement in both program & capital improvements.
- Developed all marketing evaluation, private pay therapeutic, seasonal respite/summer brochures, contracts for user groups, & all flyers/presentations for Via Services. New messaging led to 68% increase in number of participants over the previous year, 45% increase in participants attending more than one session, use groups by 54%, & overall revenue in all categories.
- Established new staff training materials & protocols to ensure the safety and individual growth of all of our participants. Greatly improved recruiting efforts which lead to first-class quality staffing for clinical services & campus sessions.

**Special Education (ISD) Managing Director –
Rocketship Education, San Jose, CA**

2009 – 2011

Responsible for managing the Special Education program across five school campuses; designed, developed, and coordinated a long term Special Education program, ensuring that all schools were in full compliance with federal and state special education laws; developed procedures, forms, and templates for the provision of all special education services.

- Experienced and knowledgeable in all SPED compliance issues - service provision, documentation, compliance reporting, etc.
- Hired, trained, and managed a staff of 16 special education teachers, speech therapists, occupational therapists, and paraprofessionals as well as both on site and telecontractors.
- Developed & monitored IEPs for students, served as Administrator in IEP meetings, and designed and lead social skills groups across all 5 schools. Specialization in mod-severe behavioral issues as well as improving familial input to educational endeavors.
- Developed crucial relationships w/families in order to build the trust & increase their involvement in their child's educational process. Listened to their specific needs to assist them more in school as well as their transition in the home or other areas.



- Set up entire database saving countless faculty and administrative hours while bringing the organization to complete compliance with district, SELPA and state requirements.
- Created new program objectives for students with special needs to mainstream them more effectively in both classroom & athletic settings. Provided unique accommodations in the class & outside to enable them to access all aspects of their education.
- Formed alliance with group of charter middle schools to increase acceptance rates for Rocketship students and a transition that was successful both academically and socially.
- Unique ability to motivate both adults and children of all ages to reach their goals. Provided supportive classroom environments with extracurricular activities, leading them to success in the classroom and beyond.

Other positions:

Small Business Owner-Downtown SJ and Campbell – 9 years as well as Managing Director/Vocational Rehabilitation Counselor - Directions, San Jose, CA - 8 years

EDUCATION/CERTIFICATIONS/SKILLS

San Jose State University, San Jose, CA - M.A., Special Education and Rehabilitation Counseling – Honors

Santa Clara University, Santa Clara, CA - B.A., Spanish, Minor-History–Secondary Education Credential Waiver Program–Honors

- Professional development course in Non Profit Management, including but not limited to, Strategic Planning, Managing Revenue Streams & Cash Flow, Budget Management, Maximizing Fundraising Streams, Human Resource Law, Board Governance and Leadership Development
- BICM (Behavior Intervention Case Management) Certification – Current; Numerous Private, University & SELPA trainings – IEP Goal Development, Positive Behavioral Intervention, Handle with Care, ILS Teaching Strategies, SPED Legal Issues, etc.
- Nationally Certified Rehabilitation Counselor - not current, CA Single Subject Teaching Waiver Credential – not current