

Objective

My aim is to generate additional market share for small and medium sized businesses through strategic community investment opportunities

Professional Experience

2005-Present

Dexterity Consulting – Calgary, AB

Community Investment Strategist

- Agar-Canada
 - America-Israel Cultural Foundation
 - Anonymous Family
 - o Grew annual campaign from \$1.5 Million to \$2.3 Million in two years
 - Artumas Africa Foundation
 - o Streamlined giving processes thereby cutting administrative expenditures by 15%
 - CentrePoint Non-Profit Management
 - o Developed a fundraising strategy for a small non-profit in order to decrease duplicity of services when it acquired a similar charity
 - Dentistry for All
 - o Developed marketing and communication materials for fundraising projects
 - Distress Centre
 - o Media relations
 - Greengate Power
 - o Government relations/Advocacy
 - o Business Development Strategies
 - Healthy Mouth Healthy Child Foundation
 - o Developed a full-service model of Venture Philanthropy that connects individual investors with non-profit organizations seeking financial support for innovative and “higher-risk” programs/services
 - Hospice Calgary
 - o Developed two workshops focused on effective philanthropic investment strategies
 - Junior Achievement of Southern Alberta
 - o Philanthropic brokerage – creating portfolios of non-profit organizations that have a proven track record of ROI for philanthropic investors
 - Peer Support Services for Abused Women
 - o Stakeholder stewardship
 - SharpCurve Solutions Inc.
 - ThruYou.com
 - United Jewish Appeal/
Calgary Jewish
Community Council
 - Small Business (under
\$10Million ER pre-tax)
 - Estate Planners, Wealth
Managers
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2008 - Present **University of Lethbridge – Calgary Campus, Calgary AB**
Instructor, Faculty of Management
Sessional instructor for Marketing 3260 – Marketing in the Non-Profit Sector
Developed curriculum that addressed the core concepts of the marketing function *in and to* non-profit organizations. Topics included: cause marketing, volunteer recruitment, fund raising, and social marketing.

2005 - 2008 **CentrePoint Non-Profit Management – Calgary, AB**
Director, Development
CentrePoint is a registered charity providing management support services to non-profit organizations throughout Alberta. CentrePoint assists 500 non-profit and charitable organizations, on an annual basis. As Director, I have:

- Created a three-year fund development strategy to manage and further grow organization. Through this strategy I successfully:
 - Grew annual campaign from \$500,000 to \$1.2 Million in two years
 - Created a formal individual donor campaign that increased individual donors from five to 13 over the course of one year months.
 - Launched a major donors campaign in spring 2007.
 - Launched annual giving campaign targeting volunteers in Fall 2006
 - Diversified funding portfolio from two foundations and four companies to over 20 foundations and corporations in under two years
 - Wrote and coordinated the production of relevant marketing and communications materials
 - Corporate, Foundation and Government grant writing
- Supervised a multi-disciplinary team comprised of:
 - Volunteer Coordinator
 - Mount Royal College Non-Profit Management Student
 - AIESIC International Intern
 - General support staff
- Oversaw the restructuring of a volunteer model that encompasses over 300 volunteers based around Alberta
- Implemented a media and government relations strategy thereby making CentrePoint the “Go-To” organization for up to date useful information on Alberta’s non-profit sector
- Project managed the creation of a Social Return on Investment tool that will be piloted to the non-profit sector in Fall 2007
- Knowledge Management Team
 - Connected CentrePoint to four like-minded agencies based in the United States, focusing on creating Communities of Practice
 - Formed partnerships with individuals, businesses and non-profit agencies addressing the need for capacity building services in the non-profit sector in Rural Alberta

- Established a mentorship program in fall 2007 that, so far, has connected two veteran philanthropists with emerging philanthropists. Program started
- Made over 20 public and professional presentations on non-profit sector related issues
- Worked with CentrePoint's Board Members to achieve financial goals

2002-2005

SharpCurve Solutions, Inc. – Calgary, AB

Resource Development Consultant

Client:
Distress Centre

- Program management
 - Market research, project design and implementation, supervision of staff and volunteers
- Event planning and management
 - Event design and implementation, corporate relations
 - Coordinated and executed three golf tournaments, and two bachelor auctions
 - Secured long-term major sponsorships for events that are still engaged with the organization
- Database design and management
- Community relations
 - Donor relations
 - Stakeholder stewardship
 - Policy management
- Marketing and communications
 - Program and event specific
 - Media relations
 - Fundraising marketing materials
- Business Development Strategies
 - Developed Annual Campaign built upon attendees at the events

2001-2002

United Jewish Communities MetroWest – Whippany, NJ, USA

Campaign Associate

Campaign:
Women's Division

- Project management - \$6 million annual campaign
 - Market research
 - Community relations
 - Donor relations
 - Corporate relations
 - Stakeholder stewardship
 - Developed campaign marketing materials
 - Acted as a conduit for like-minded individuals to connect with each other through social investing
 - Created a fundraising event in support of NYC and the 9/11 disaster for young professional women (minimum donation \$1800)
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Additional Work Experience

- 1996-2001
- Various Positions within the North American Jewish Community
 - Director of a variety of departments including: Senior Adult programming at the Calgary Jewish Community Centre (\$20K annual budget), Community Theatre Companies (Children and Adult theatre - \$50K annual budget), Residential and Day Summer Camps

Publications/Presentations (in addition to above)

- “Cause & Effect: Special Report on Corporate Social Responsibility”, Alberta Venture Magazine, pgs. 69-86, January 2010
- “Adaptive Philanthropy,” Blog-Talk Radio, Sept. 25, 2009
- Guest speaker, Bow Valley College, “Milestones Project and Social Enterprise,” September 2009
- “Venture in Corporate Karma Makes Dollars and Sense” Calgary Herald, Aug. 30, 2009
- Member of Canada’s Delegation to the G8 Summit for Young Entrepreneurs, July 2009 - Stresa, Italy
- “What Most Needs Doing – Creating your Charitable Giving Program,” Teleseminar; Mawer Investments; Investors Group, Spring/Summer 2009
- “Whose Twittering and Why?” Calgary Herald, Mar. 29, 2009
- “Doing Business with the Charitable Sector” Mompreneur Magazine, pgs. 52-54, Jan-Feb, 2009
- “Spirit of Giving may be Cautiously Strong”, Financial Post, Dec. 15th, 2008
- “Cross-Border Philanthropy: The More we are Different, the More we are the Same Pts. I and II,” May 2008, July 2008 – www.onphilanthropy.com
- Presentation: “Canada’s Charitable Sector – The Business of Philanthropy,” April 2008 – University of Lethbridge
- Presentation: “Strategic Philanthropy – The Business of Philanthropy,” Toronto, Brandeis University Alumni Association, February 2008
- 2007 Presentations and workshops on various fundraising topics, SROI measurements, and personal and corporate philanthropy
- AFP Western Conference, 2007, Co-Presenter on Performance Measurements
- “Performance Measurement – Valuing Impacts on a Whole Justifies Investment,” Canadian Fundraiser e-News, June 15, 2007
- Quoted in a variety of articles for Calgary INC. and the Calgary Herald on fundraising, philanthropy and other non-profit sector issues (copies available)
- Guest lecturer at the Haskayne School of Business on non-profit management issues (2002-2005)

Volunteering

Board Member TD Friends of the Environment Foundation (current)
Alberta Government – Culinary Tourism (current)
UEnd (2006-2009)
Global TV Woman of Vision (2007-2009)

Committee Member United Jewish Appeal – Vice-Chair, Program and Allocations Committee (current)
Canadian Humanitarian – Calgary Chapter (current)
Leadership Calgary Recruiting Committee (2007- 2009)
AFP Western Conference – Logistics Chair (2005)

General Volunteer DJD (current)
Distress Centre (2002-2007)
Canadian Humanitarian Organization for International Relief (current)
Big Brothers Big Sisters – In-School Mentor (2006-07)
Calgary Jewish Community Council – Ethiopia Project (2006)
CAWST (2004-05)

Memberships/Associations

- Advisors in Philanthropy (2009)
- Imagine Canada – Caring Company (2008 – date)
- Association of Fundraising Professionals (2002-2008)
- Calgary Chamber of Commerce (2002-2007)
- Leadership Calgary, Class of 2007

Education

1997-1999 **MA – Non-Profit Management/Jewish Communal Service**
Brandeis University – Waltham MA, USA
Thesis Topic: Outcomes Based Measurement Systems

1993-1996 **BA with Honours – History and Judaic Studies**
York University – Toronto, ON
Thesis Topic: Jewish Community in Victorian England

1992-1993 *Hebrew University – Jerusalem, Israel*
Focus of Study: Liberal Arts – Political Science and History

Awards

- 2009 Avenue Magazine Top 40 Under 40
- Brandeis University Graduate Studies Scholarship
- Rabbi Postone Scholarship for Graduate Studies
- Jewish Community Centre Association Scholarship for Graduate Studies
- Calgary Jewish Community Council Scholarship for Graduate Studies
- Dale Carnegie Speech Awards
- Calgary Board of Education High School Achievement Award

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Additional Skills

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| Languages | English (fluent) French (rudimentary) Hebrew (rudimentary) |
| International Experience | Studied, worked and lived in: Canada, United States, and Israel. Extensive overseas travel including parts of the Caribbean, Africa and Europe. |
| Interests | Learning one new athletic skill each season: golf, volleyball, Ultimate Frisbee, snowshoeing, ballroom dancing, backpacking Reading fiction and non-fiction Travel Long walks with my dog Writing BLOGs: www.dexterityconsulting.ca/blog : Strategic Philanthropy www.whatdowehaveincommon.blogspot.com : Cross Canada road trip in an effort to build community and breakdown barriers. www.thedesertsands.blogspot.com : Travel log of trip to Ethiopia and Israel. |