

Experience

Managing Member

Core Focus Associate LLC

Troy, MI

2013-Present

- Consult and advise chief development officers on research program operations and performance
- Develop and deploy analytical methods and tools to identify likely new prospects
- Establish and train new analysts in research and prospect development/management
- Train and manage an affiliate network of research analysts

Senior Director of Research

Beaumont Health Foundation

Royal Oak, MI

2013-2018

- Manage a research program to aggressively support and achieve an annual \$40M fundraising target
- Develop and implement business tracking, improvement programs, and metrics reports
- Design, implement and maintain a system-wide physician education, training and analytics program
- Collaborate heavily with major gifts, stewardship, planned giving, gift entry, and data management teams
- Conduct training and ongoing education for all executive staff

Associate Director of Development Research

University of Michigan

Ann Arbor, MI

2011-2013

- Led product testing, training, reporting, procedure transition and modernization of legacy research data systems
- Developed and deployed a multipoint analyst training and certification program in core and advanced skill sets
- Provided support for the University President, Vice Presidents and executive officers to raise more than \$200 million annually

Associate Director of Research

Beaumont Foundation

Royal Oak, MI

2007-2011

- Managed and maintained Raisers' Edge prospect data for a \$200 million comprehensive campaign
- Developed automated database affinity model and calculator
- Designed and coded over 150 Business Objects-based information tools and reports

Prospect Research Analyst

Beaumont Foundation

Royal Oak, MI

2006-2007

- Introduced customized and user-driven reporting processes
- Conducted research and delivered approximately 200 briefing products in support of fundraising operations

Laboratory Assistant

Beaumont Reference Laboratory

Royal Oak, MI

2003-2006

- Integrated laboratory database for reporting
- Introduced automated efficiency tracking measures to supplement ISO 9000 standardization

Education

Michigan State University - James Madison College

East Lansing, MI

1999-2003

- Bachelor of Arts in International Relations

Skills

- 15+ years of experience in database integration, data retrieval, report writing and visualization

- Extensive ISO 9000 standards expertise in procedure development, documentation, training, and audits
- Proficient with Business Objects, UNIX, Linux, Microsoft, and Mac OS application environments
- Administrator-level experience with a variety of philanthropy-related software packages

Affiliations

- Member: Gleaners Community Food Bank Board of Directors, MichBusiness Advisory Board (2016 - Present), Chinese American Association of Michigan, Organization of Chinese Americans, Council of Asian Pacific Americans, and APRA - Michigan Chapter (Past board member and past president), APRA (Past board member)