Why do you want to join the Board?

There's a lot of work to do, implementing the new strategic plan. I'd like to help. My skills in sales, marketing, project management, process design and management, financial management, meeting facilitation, and leading teams could be useful within the Board and in helping the Corporation and Corporation members evolve with the new plan. In addition, my financial skills will enable me to assist with the Treasurer role and, potentially, take that role on when it's time to transition the role to a new person.

Why is CBI important to you, and what has been your experience with CBI?

My wife sailed here as a teenager. During the pandemic, she and I turned to CBI for our outside activities and sailed both weekend days through most of the summer of 2020, almost that much in 2021, and a bit less in 2022. Initially, it was a positive environment, a safe place to come during the pandemic. I was deeply impressed by the dock staff and dock leadership and the "client experience" of learning to sail and sailing here – helpful, supportive, enthusiastic, patient, gentle, forgiving. And I was impressed by the other sailors who offered suggestions and guided us along to our red ratings.

Once I started teaching classes (initially orientation, Shore School, and Rigging), I felt excited to help people learn the ropes, particularly how to rig a boat and tie a beautiful cleat knot! Watching people develop in 2 – 3 hours from "no knowledge and a little nervous" to "smiling confidently" after completing the rigging test has been a hugely rewarding experience for me. I'm hooked!

What capabilities do you bring to the Board, including work experience, and work on other boards and organizations?

At CBI, I've served for a year on the Budget and Finance Committee. I've developed a good sense of "the numbers" and what's needed to keep CBI financially afloat. After reviewing CBI's investment strategy and execution, I proposed, initiated, and co-led an effort to re-evaluate CBI's investment strategy and, ultimately, a successful effort to choose an outside advisor to advise CBI on changes to the investment policy and to manage CBI's endowment funds.

In the non-profit world, for almost 10 years from 1998 to 2008, I served first as a program leader and later as President of Concord Carlisle Youth Soccer responsible for Club governance, compliance, operations, program design and execution, coach education, and financial management. At the time I became President, I led a successful effort to rebalance the program focus to attract more kids to the intown recreational soccer program by enhancing the soccer curriculum, coaches' skills, and parent communication. We tripled the number of players in the program over a ten-year period and the kids who started in the program when I started won three state championships at the high school level.

In the for-profit world, I founded and have been running for 32 years a financially successful consulting practice. We assist medium and large banks and credit unions to communicate and translate their strategies to customer-facing staff and train the staff in the skills and processes they need to fulfill the strategy. Through that work, I've developed expertise in strategy clarification and implementation, value proposition development, change management, training design and development, workforce development, process management, project management, meeting facilitation, and leading teams.

What issue(s) would you like to focus on as a board member?

Implementation of the governance elements of the new strategic plan including improving Board efficiency and effectiveness, preparing to recruit a new Executive Director, and adjusting the role of the Corporation, and the role of Corporation members.

Endowment management and, more broadly, financial planning, management, and controls.

Development of additional corporate support, charitable giving, and grants.

Identification and attraction of new populations to become active members, particularly provide sailing opportunities for kids in the city of Boston.

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