

Executive in Residence, Advisor and Independent Board Director

Trusted advisor and Board member, known for integrity, accountability, and strong collaboration and communication skills, with a successful track record as a leader of strategic initiatives in a variety of industries. My areas of expertise are strategy and risk, operations, and process excellence

- My corporate board experience includes family owned and private companies ranging up to \$350 million in annual revenues in consumer products, manufacturing, retail, real estate, and entertainment. With 18 years of corporate board service, 12 have been in leadership roles as Chair of Strategy, Audit, and Nominating and Governance committees.
- As a Public Company Officer/Executive, I led Workplace and Culture transformations at Fortune 500 financial services, telco and healthcare companies. Results included
 - a cost reduction initiative from a sale/leaseback with a REIT and occupancy savings of \$420 million
 - scaling for growth that added 1,400 new rooftops in 3 years while managing all aspects of an existing portfolio of 10,000 retail sites
 - transforming a culture from staid and hierarchical to an inclusive, flexible Workplace that encourages collaboration
- I founded an advisory firm that provides strategic planning and risk management, real estate portfolio optimization, and organizational and process redesign services; clients include startups to Fortune 1000
- I'm a founding editor of a London-based peer-reviewed journal and author and speaker at numerous industry forums

My passions are education and connecting people to spark change. My commitment to give back to the community by serving on numerous boards of charitable companies and professional associations started in the mid-1990's and continues today

Executive and Board Leadership Experience

- **Executive in Residence**, University of Missouri–Kansas City (UMKC), Henry Bloch School of Management, July 2021 – Present
- **Director**, Faultless Brands, KC, MO. 2016-June 2020. Chaired Audit and Strategy Committees for this CPG private company
- **Senior Director Global Properties**, Cerner, Kansas City, MO. 2017-2018. \$5 B public company in healthcare and IT. Responsible for all aspects of a high growth global portfolio of owned and leased properties in 30 countries with a capital budget of \$250+ Million and annual operating budget of \$40 Million. Led the creation of the company's first strategic plan and balanced scorecard for the department, adding talent development and collaboration with key strategic partners as high priorities to improve both associate and customer satisfaction and our effectiveness in support of enterprise goals while providing a safe, agile and effective workplace
- **Board Member**, Burroughs and Chapin Company, Myrtle Beach, SC, 2005-2015. A private real estate company. Chaired Audit and Nominating and Governance Committees
- **Vice President Distribution Strategy & Operations, US Tax**, H&R Block, Kansas City, MO, 2004-2008. Responsible for managing a portfolio of 10,000+ retail points of presence and led the largest expansion of retail stores in the company's history, opening 1,400 new offices in 3 years on a tight budget and seasonal schedule. Developed the site selection and leasing strategy and oversaw the budget and all buildout, including network and IT. Collaborating with Human Resources, Info Technology, Finance, Corporate Analytics, Marketing, Legal, and Field Operations, I led a team that developed a new analytics and planning tool to optimize retail performance while leveraging Associate Talent to seed and lead new offices
- **Senior Vice President Strategy/Quality & Productivity, Management Services**, Bank of America, Charlotte, NC, 2001-2004. I led the integrated strategic planning process and served as Six Sigma Deployment Champion for Management Services responsible for prioritizing cross-divisional cost reduction initiatives across all lines of business and a 70 million square foot portfolio of office, retail banks, data centers and call centers to meet global enterprise goals.
- **Managing Director**, RealCentric, tech startup in San Jose, CA/Henderson, NV, 2000. Online commercial real estate. Responsible for vendor relations strategy and process improvements for a web-enabled service for office occupants. Guided continuous improvements for communications with tenants, landlords, brokers, and vendors and served as the face of RealCentric at Centeri, a group of global corporate end-users that RealCentric gathered for benchmarking and sharing of best practices
- **Group Manager Strategic Planning and Program Management**, Sprint, Overland Park, KS, 1994-2000. As a leader of Sprint's strategic planning and program management group during Sprint's high growth period in the 1990's, I matrix-managed the development and implementation of the programming, planning and operational integration for a \$1 Billion, 14 building campus on a

tight budget, fast-track timeline and complex move-in logistics, which involved vacating over 50 buildings while maintaining business co-location requirements and associate satisfaction as part of Sprint's transformative World Headquarters culture initiative

- **President, The Henry Joseph Company**, Kansas City, MO. 2001- present. Advisory services: strategic planning/risk management, real estate portfolio optimization, organizational & process re-design. Clients from start-ups to Fortune 1000
- **Manager--Marketing, Risk Management, Finance, Hallmark**, Kansas City, MO. 1989-1994. Responsible for a \$50 million product line at Hallmark. I led a cross divisional team in the end-to-end redesign of one product line that resulted in reducing costs by 20% and cycle time by 50% while doubling sales in the first year. As Risk Manager I led an environmental initiative coordinating a team from operations, finance, and sales and marketing that established the foundation to track and report reduction in VOCs
- **Real Estate Sales and Development, Leo Eisenberg Company (LECO)**, Kansas City, MO. 1986-1989. Recruited from Wharton by Chairman LECO. Developer -- one of the largest retail developers in the US at the time
- **Project Team Leader/Co-Author. Association of American Universities**, Washington, D.C. 1982-1984. Led a team of international researchers on a project and co-authored a report used by Congress to set funding requirements for university programs. Collaborated with a variety of government agencies including the Department of Defense, CIA, NSA, State Department and the Department of Education and an Advisory Board of US-based international corporate leaders

Board and Community Engagement

Member of the Board, National Association of Corporate Directors (NACD) Heartland Chapter. 2018-present. NACD Governance Fellow and NACD Directorship Certified

Member Advisory Board, 2007--present, University of Missouri-KC, Bloch School of Management, Lewis White Real Estate Center

Member of the Board, 2016-2020, Faultless Brands, KC, MO. Private company whose brands include Faultless Starch, Bon Ami, Garden Weasel and Trapp Candles. Chair Strategy Committee and Chair Audit

Member of the Board, 2005-2015, Burroughs & Chapin Company, Myrtle Beach, SC, a private real estate company

Trustee, Treasurer, 2012--2018, Kansas City Zoo Learning Fund (501c3), Kansas City, Missouri

Treasurer; Director of Sustainer Council and Member of the Board, Junior League of KC, MO, 2010-2011; 2017-2018

Member of the Board, 2012-2014, Goodwill of W. MO and E. KS. Chair Governance Committee, member of Executive Committee

Member of the Board, International Relations Council, 2000--2001

President of KC Chapter CoreNet Global, 1996-1998. Member since 1995 of Corenet Global (formerly NACORE)

Trustee of the Board, International Development Research Council, Atlanta GA, 1999-2001

Member of the Board, The Kansas City Academy, 1992-1994, an independent, 6-12 private school

Industry Thought Leadership

- “Whither corporate real estate: CRE Risk Reboot in *Corporate Real Estate Journal* (CREJ 2021); “Is Corporate Real Estate the Workplace Integrator, 2.0: The Shift to Artificial Intelligence” and “Future-ready Corporate Real Estate Workforce – are you prepared?” in CREJ 2019, “CRE’s Evolution since 2000 and Impacts of Technology” (CREJ 2015). Panelist on “Evidence-Based Decision Making – Why, How, When” at CoreNet Global Summit in Philadelphia and author of cover article in CoreNet’s *Leader* (2016), “How Corporate Real Estate Can Align (and Stay Aligned),” Speaker for Commercial Real Estate Women (CREW) on mega-trends impacting real estate
- Moderator for a panel discussion on “Shareholder Activism” organized by the law firm Stinson LLP (April 2021). Moderator for a panel discussion on “Considerations for the Board in the Mergers and Acquisitions (M&A) process,” the final event at a virtual M&A boot camp organized by Stinson LLP with 500+ participants (September 2020)
- Chair University of Missouri-Kansas City Real Estate Symposium, an annual credit-granting continuing education program for industry practitioners and a fund raiser for UMKC Bloch School, 2020--Present
- Panelist at National Association of Corporate Directors (NACD) Heartland Chapter, “Leveraging Excellence in 2017: Best in Class Insights for Private, Family Owned and Not for Profit Boards” and author of “Impact of Workplace Strategy on Enterprise Goals” in *NACD Directorship Magazine* (2016)
- UMKC Bloch School instructor, 2011-13: created CRE curriculum and taught graduate and executive education classes
- Speaker at the National Press Club National Summit on Building Performance

Education

- Wharton School, MBA, Management with a focus in Real Estate
- University of Washington (Seattle), PhD, National Defense Foreign Language Fellow and Fulbright Fellow
- Swarthmore College, BA with Distinction, Phi Beta Kappa