



## EDUCATION

- BA, Computer Science & Mathematics, SUNY Potsdam, 1985; 3.92 GPA
- University of Rochester, Simon School of Business, 12 MBA Credits, 1992

## PROFESSIONAL AFFILIATIONS

- Member of the Monroe County Systems Integration Project; leadership, multiple committees, design team: 2017-Present
- Control Systems Integrator Association (CSIA) Board of Director: 2014-2016; Leadership and Integrator Marketing Committees, Panel Speaker
- Rochester Engineering Society; Board Member; President; Executive, Gala, Scholarship Committees - since 2005
- COMET Advisory Board: 2014-2019
- Society for Marketing Professional Services (SMPS): 2011-2014
- Founder/Leader of Inbound Marketing Peer Group: 2015-2017

## AWARDS AND DISTINCTIONS

- 2016 Engineer of the Year, Rochester Engineering Society
- 2014 Engineer of Distinction, Rochester Engineering Society
- 2014 Technology Woman of the Year Finalist, Digital Rochester
- 2012 Girl Scouts of Western New York Women of Distinction Award in STEM
- 2009, Finalist for Rochester Business Journal's "Best of the Web" Award
- Rochester Engineering Society's 2008-2009 Outstanding Volunteer Leadership
- National Merit Scholarship Semi-finalist; full undergraduate scholarship to study Computer Science
- Valedictorian, Wayne Central High School, Ontario, NY 1981

Hands-on executive with over thirty-five years' experience serving non-profit, manufacturing, and commercial customers in human service, engineering service and software product industries, providing transformative leadership leveraging direct experience in management, sales, marketing, quality, engineering, design, development, testing, documentation, and training.

- Specialties include systems integration, process development, standards development, and quality systems, with experience across all aspects of diverse technology business requirements, utilizing best practices from ISO-9001 and the Control Systems Integration Association (CSIA).
- Degreed in computer science and mathematics with technical, personal, and business acumen to communicate effectively with executives and project team members at all levels.
- Varied team leadership experience across broad technical, application and business disciplines, focusing teams on specific objectives, tracking progress to ensure project milestones are completed on time, within budget and with the desired results.

## SKILLS OVERVIEW

- Business strategy and planning; marketing and sales strategy, process development and product management
- Project management, agile methods, software and systems integration
- Customer relations, requirements analysis and engagement
- Cross-functional supervision, team building and mentoring
- Software development, Information Technology, Supervisor Control and Data Acquisition (SCADA) Systems, database and network support
- Quality systems, process and standards development, documentation
- Business development and sales, including supplier / partner relations and CRM implementation
- Marketing communication, digital marketing, content creation/management and marketing automation

## ACHIEVEMENT HIGHLIGHTS

- Vice President on new management team that established profitability and sustainable business results at COMET Informatics, a \$1M software company serving non-profit agencies who work with children
- Worked directly with CEO in a variety of roles, including VP of Marketing & Sales, to grow Optimization Technology, Inc. from a small company with less than 20 people to a >\$50M concept-to-completion engineering and skilled trades industrial service company, with hundreds of employees focused on ethics, quality, and customer satisfaction
- Requested and active leader on the Board of Directors for the Control Systems Integrator Association (CSIA) from 2014-2016, an international professional organization focused on Best Practices for the industry
- Honored in 2016 as Rochester Engineering Society's "Engineer of the Year"

## Career Experience

### CHILDREN'S INSTITUTE (ROCHESTER, NY), JUNE 2020-PRESENT

Joined the leadership team of Children's Institute, a \$5M non-profit that has been advancing the social and emotional health of young children since 1957, to support mission and methodology transformation, working with the executive director, staff, and partners. Key responsibilities include defining strategic change and associated metrics, pandemic-related initiatives, communication and development processes, and technology implementation.

#### **DIRECTOR OF ORGANIZATIONAL TRANSFORMATION, June 2020 - Present**

Facilitate agency-level transformation, breaking down operational program silos, and stimulating & implementing mission-centered innovation. Lead agency marketing and communication around agency and board priorities, fostering team/resource performance and continuous improvement. Lead continuous improvement projects focused on data and technology quality, mobilization, and innovation with a focus on participatory engagement to advance racial equity and justice goals. Review and improve resource development and fundraising strategies and goals. Support board and staff with board administration and documentation, as well as agency-wide training. Support the Executive Director administrative needs as community liaison and other requested priorities. Develop and implement COVID compliance processes; supervise communication, development, and administrative staff, as well as interns. Engage in community initiatives including the Monroe County Systems Integration Project (TogetherNow), ROC the Future Alliance collective impact anchor entity, and Get Ready to GROW developmental screening and follow-up.

#### **REPRESENTATIVE PROJECTS**

- *Strategic Planning*: Engage in leadership and implementation of agency-level mission evolution, translating to strategic directions and 6–18-month projects, activities, goals, and metrics.
- *Social Media Process Improvement*: Targeted improvement of social media process, including the addition of Twitter and LinkedIn social channels, with improved content collection and scheduling of posts, resulting in larger and more varied audiences for amplifying agency messages.
- *Monroe County Systems Integration Project (TogetherNow)*: Continued support of this county-wide project on the Leadership team, Legal, Data Use/Governance, Informed Consent, and Integrated Service Delivery workgroups, supporting and participating in the human-centered software design process.
- *Get Ready to GROW - Early Childhood Comprehensive Screening*: Provide technology, marketing, and process insight on the Action team of this comprehensive community initiative that integrates screenings for children ages 12-60 months to identify needs in hearing, vision, dental health, language and speech, cognitive, and social-emotional development.

### CONSULTING SERVICES (FAIRPORT, NY) DECEMBER 2019 – JUNE 2020

#### **BERGMANN ASSOCIATES**

Developed and delivered hydropower training and marketing collateral.

#### **OCTEUM**

Strategic, marketing, and communication planning; website, social media, and collateral development support.

#### **CHILDREN'S INSTITUTE**

Marketing consultation in support of Get Ready to GROW comprehensive screening / closed-loop referral initiative, including branding, awareness, and design of mobile screening unit with bilingual messaging.

## COMET INFORMATICS, LLC (PITTSFORD, NY), 2017 - NOVEMBER 2019

Joined COMET, a \$1 million software and services company, to serve the board, customers, partners, employees and stakeholders with the mission to improve the success of children. With the founders handing the reigns to a new CEO in 2017, our management team's focus was to develop a foundation for sustainable business results; COMET had not had a profitable year previous to 2017. Served on COMET's Board of Directors since 2017 and as a Company Officer as Secretary; served on COMET Advisory Board since 2014. Worked as key liaison to founding partner Children's Institute on partnership improvements, software updates and community services, particularly in cross-domain, whole child health efforts.

### VP SALES AND MARKETING, July 2017 - Nov. 2019

Each aspect of COMET was reviewed and analyzed; strengths and weaknesses were identified, and continuous improvement actions were planned, prioritized and implemented. Changes were made to reduce expenses, increase revenue and put in place a new company culture with staff, customer and our partner Children's Institute's involvement. Responsibilities included general company management, development of business systems and processes, sales management, client account management, marketing communications, marketing strategy, strategic partnerships, direct supervision of marketing and sales professionals and indirect management of sales and marketing efforts of individuals throughout the company. Also defined role and performed duties of Data Protection Officer (DPO). Successfully improved COMET profitability, designed and leveraged new business processes and systems, updated and evolved marketing and sales practices, hired and developed employees, documented and improved on the company information security program, evolved engineering processes and architecture, and developed a product roadmap to support important community needs, particularly improved data collection, data reporting and school-age and whole child health collaborations. Enhanced the COMET brand in Rochester and in other regions. Planned and began roll-out of up-to-date and defined product offerings from COMET with a focus on two specific collaborative vertical markets – School Age and Whole Child Health.

### REPRESENTATIVE PROJECTS

- *New Customers:* Led efforts to introduce COMET to new market segments of human services and collaborative communities. Closed several large new deals (>\$100K) in these markets.
- *Website Rollout:* Led design and development of new Drupal-based website. Resulted in increased brand awareness, lead capture and foundation for marketing and sales.
- *Enterprise Automation:* Researched, developed requirements, piloted, selected and rolled- out Zoho platform for improved efficiency and quality of company processes. Integrated applications included CRM, social media, email campaigns, surveys and lead capture, project management, timesheets, expense reports, invoicing and accounting.
- *Sales Processes:* Developed new proposal processes, terms and conditions, pricing, sales funnel management and sales forecasting. Resulted in improved quality and accessibility of data; supported consistent and efficient customer renewals.
- *Get Ready to GROW - Early Childhood Comprehensive Screening:* Teamed with Children's Institute and community partners to advocate for a comprehensive initiative that integrates screenings for three-year-olds to identify needs in hearing, vision, dental health, language and speech, cognitive, and social-emotional development. This initiative is growing to support 0-8 year olds across 13 counties. Provided technology and process insight.

## **OPTIMATION TECHNOLOGY, INC. (RUSH, NY), 1992-2016**

Served on Optimation's Board of Directors from 1996 through 2013, when ORG, a private equity firm, purchased majority ownership in the company. Played a major role in many of the milestones at Optimation, including its first ISO 9001 registration, Control System Integrators Association (CSIA) Best Practices registration, and the acquisition of multiple companies throughout the United States. Served as a Company Officer as Secretary since 1996 and as a Trustee for the company Employee Stock Ownership Program (ESOP).

### **November 1992 – September 2004**

- ASSOC. MGR. MECHANICAL & PROCESS: Assisted with the management of 50 engineers and designers in the mechanical and process group.
- MGR. SOFTWARE & SYSTEMS INTEGRATION: Managed a group of 12 new remote software engineers. Responsibilities included hiring, performance review, marketing and resource planning. Responsibilities also included network support, information technology support and software client services.
- MGR. ELECTRICAL & INSTRUMENTATION DESIGN: Managed a group of 15 designers and drafters, with responsibilities including hiring, performance review and resource planning. Responsibilities also included network support, information technology support and software client services.
- SENIOR SOFTWARE ENGINEER: Responsible for project management, SCADA system consultation and SCADA system development, driver development, "C" and VisualBasic language control software, and relational database development. Define project requirements, design, develop and deliver control systems in a real-time manufacturing environment, leveraging appropriate toolsets, design documentation and vocabulary. Custom client platforms and solutions variety, real-time communication requirements and hardware and database integration proved to be uniquely demanding.

### **REPRESENTATIVE PROJECTS**

- Developed SCADA system for ultrasonic glass cleaning process.
- Developed QA system to measure coating reflectivity, using stepper motor and spectrophotometer.
- Project manager and C language developer for power-monitoring instrument user interface according to ISO-9001 requirements.
- Developed SCADA system for heat exchanger test stand, specialty surface coating machine and dairy evaporator and pasteurizer systems.
- Project manager / SCADA developer for controls development & electrical installation for T-acid extraction process.
- Developed SCADA system for water distribution with 11 nodes / 26 remote substations and remote redundancy. Replaced an antiquated system that could only update data every 6 minutes. The new system integrated hundreds of tanks, pumps and valves, and was used to control the distribution and treatment of water throughout Monroe County. Timely and reliable communications were important for this distributed system, as well as accurate historical archiving of data, alarming of specific system conditions that required attention and reporting of data to ensure that system performance and water quality were optimal.
- Developed VisualBasic OPC interface to communicate power monitor data to a web- based application server for energy management purposes.

### **QUALITY MGR; MGR OF ENTERPRISE SOLUTIONS, September 2004 – September 2007**

Responsible for planning and implementing enterprise solutions, both internally for the company and externally for clients. Areas covered include web-based information system implementation, SQL Server, and manufacturing execution systems (MES). Responsible for the development of internal company systems, website, company management and marketing communication. Additionally responsible for Quality Management System, performing as Quality Manager for the company to ISO-9001. Also involved in standards development, integration planning, and partnerships with third-party software and hardware vendors.

### **DIRECTOR OF SALES AND MARKETING OPERATIONS, September 2007 – October 2009**

Responsible for defining, improving and managing processes in support of sales and marketing at a corporate level. Specific responsibilities include proposal review and processing, design and production of marketing collateral, design and update of corporate website, capturing of project profiles, sales management processes, customer relationship management processes, and general support of all corporate processes.

### **VP SALES AND MARKETING, October 2009 – July 2016**

Responsible for marketing and sales at Optimization, a >\$50 million industrial engineering and skilled trades services company with over 200 employees. Responsibilities for development of business systems and processes, sales management, client account management, marketing communications, inbound marketing strategy, strategic partnership and general company management. Direct supervision of five marketing and sales professionals; indirect management of sales and marketing efforts of individuals throughout the company. Engineering experience is leveraged to develop crucial technology for sales and business development reporting and processes, including sales funnel, lead management, sales forecasting, and project win and loss analysis, all using Optimization's ERP system with a SQL Server database. Designed and developed the Optimization website, including over one hundred pages of content, site organization, project database integration and SEO keyword plan. Responsibilities include development of proposal templates and processes, review of proposals and terms and conditions, development of marketing collateral, both print and online, and company branding.

### **REPRESENTATIVE PROJECTS**

- *Content-Managed Website Rollout:* Led design and rollout, in an agile environment, of responsive, DNN-based website. A highlighted feature is automated, searchable project profiles based on a process that captures and integrates key information from the enterprise database. Worked with web development partner to complete project on schedule and on budget.
- *New Inbound Lead Generation Processes:* Researched, developed requirements, selected platforms and rolled out processes to add lead generation and inbound prospecting efforts and marketing campaigns to existing marketing and sales team. Tools implemented include LeadForensics and Hubspot.
- *Enterprise Database Developments:* Guided teams in the development of relational database process improvements to support a variety of marketing and sales initiatives, including proposal processing, project profile capture, sales funnel management, sales forecasting, and account targeting and management. Resulted in improved consistency, analysis and accessibility of data.

### **HARRIS CORPORATION / SCIENTIFIC CALCULATIONS (FISHERS, NY), 1985 - 1992**

- *Product Manager:* Responsible for printed circuit board design product requirements and communication during merger/acquisition/alliance purchase. Responsible for new product pricing strategy. Responsible for defining product requirements for printed circuit board manufacturing interfaces.
- *Senior Software Engineer:* Developed C Software on UNIX and VAX systems to perform gridless printed circuit board trace routing, according to design rules. Developed a complex algorithm that created square-ended polygons from data comprised of overlapping line segments defined by endpoints and widths. This algorithm allowed a traditional PCB CAD system to be used to develop hybrid electronics that were manufactured using an additive process, rather than traces created using a subtractive process.
- *Software Engineer:* Developed interfaces from CAD software to manufacturing machines and data exchange standard interfaces, including DXF and IPC350. Delivered customer software to international clients. The challenges were, of course, of an engineering nature, but also ones of communication, organization and professionalism in a new environment.
- *Summer Intern:* Supported administrative requirements of the training group, performed backups, supported accounting group needs including report configurations and data entry quality.

## PUBLICATIONS AND PRESENTATIONS

- Experienced blogger, regularly engaged in social media communities
- Published author/article contributor in industry magazines such as The Rochester Engineer, Rochester Business Journal, and Consulting Specifying Engineer
- Presentations as a Software Engineer, Project Manager and VP of Marketing and Sales in a variety of venues, including speaking engagements at water symposiums, client/vendor presentations, and professional society and sales conferences
- Guest Alumni speaker for the SUNY Potsdam Mathematics Department
- Guest speaker for RIT's School of Communication Career Day – 2015 and 2016
- Youth Entrepreneurship Panel Speaker, 2014 – SUNY Geneseo
- Member of Digital Rochester's panel of technology leaders to discuss challenges of women in the field of IT. Led by Jeanne Casares, CIO at RIT, subjects included achieving success in a male-dominated field and how mentors have played a role in career growth for women. Panelists included Anne Bell, VP Enterprise & Corporate, Xerox Corp., Dan Canzano former VP IT, Paychex Inc., Guylaine DiSalvo, Executive VP, Consilium1 LLC; Kim Sowers, Director, Application Development, RIT; October 2014.
- Guest speaker for Venture Jobs Foundation Jobs Kitchen Accelerator program, Rochester, NY; Sept. 2019, 2020  
Guest speaker for St. John Fisher College School of Business MBA Financial Management / International Finance Classes, 2018-present
- Panel member providing business plan feedback for students in the Entrepreneurship program at Hobart and William Smith College; April 2021 - Present

## CIVIC AND COMMUNITY ACTIVITIES

- Parent of three wonderful young ladies: Grace, 27; Leah, 25 and Katie, 23; parent volunteer for countless efforts, including Room Parent Coordinator, Brooks Hill School, Fairport: 2003-2009 – assign room parents for all the classes in the elementary school; plan staff appreciation breakfast and luncheons
- As an engineer and company leader, serve as a role model and mentor for younger women, including those who may choose to pursue engineering as a career or start their own software companies. Past volunteer with the Career Resource Center, providing informational interviews as requested. Regularly promote opportunities for women and girls to become involved in engineering and technical fields.
- Corporate Challenge Team Captain, COMET Informatics: 2018-2019; Optimization Technology, Inc.: 3.5-mile company team road race; 1994-2016; Rochester Marathon Relay Team Captain, Optimization Technology, Inc.: 4-person teams; each run a leg to complete Rochester marathon; 2012-2016
- Volunteer Yoga Teacher: weekly class offered at Optimization; 2013-2017
- Inbound Marketing Peer Group: Led ad-hoc regional group of marketing professionals; 2015-2017
- Volunteer mentor and speaker for the Venture Jobs Foundation Jobs Kitchen Accelerator program that assists small business owners to refine plans for growth through a 9-week cohort.
- Rochester Engineering Society; Since 2005, Member, Board Member; President; Executive, Gala Committees. Continuing member of Scholarship Committee
- Tech Task Force, Fairport School District: 2014-present
- Volunteer and member of Monroe County NY Systems Integration project (TogetherNow), which aims to establish connections between hundreds of local health, education, and human services organizations by building technology and establishing relationships across sectors, a critical need for the community, as well as a key need and priority identified by people living in poverty. Serve on leadership, legal, data use, data governance, informed consent, and integrated service delivery workgroups, as well as prototyping efforts.