

Summary List of Client Engagements - Terry Miller

Updated: March 2007

This is a summary which does NOT include my work with dozens of grassroots organizations while working for The Youth Project (1984-1992), or the over 100 various types of nonprofit organizations while working for Silk, Adler & Colvin (1996-2004). Certain matters such as IRS penalty abatement requests or other serious compliance issues are confidential and not reported.

Client	Location	Type	Project(s)	Complex or Interim	Start	Last
IAF NW - Industrial Areas Foundation Northwest Affiliates: Spokane Alliance, Justice Alliance Education Fund, Sound Alliance, Puget Sound Vision, Metropolitan Alliance for the Common Good, and SustainableWorks	Seattle Spokane Pasco/Yakima Portland	c3/c4	HANDS ON / CONSULTATIONS & TRAINING: assist staff with C3 accounting procedures for tax compliance in affiliated C3/C4 arrangements; review draft forms 990; perform various finance and governance functions similar to those of a staff CFO; guide process on establishing two new (c)(4) affiliates; assist with formation of a community economic development program and future planning; prepare FY06 formal financial statements for two affiliates after cessation of auditor relationship;	●	Aug-04	current
Camp Laugh-A-Lot	Pine Ridge Reservation	c3	CONSULTATION: assist with background education and review of c3 tax exemption application for free summer camp outings serving children on Pine Ridge Reservation;		Mar-07	current
TACS (Technical Assistance for Community Services)	Portland	c3	TRAINING SESSIONS: Public workshops on Form 990, Fiscal Sponsorship, Lobbying Basics, & Cash Flow; CONSULTATIONS: debrief CEO on new venture, prepare outline and proforma; general PC troubleshooting way back at first PCs; assist with graphic financial statement presentation; assist with development of excel templates for financial training package for low income housing organizations; assist with feasibility study of developing a fiscal sponsorship subsidiary;	●	Aug-86	current
AICPA (American Institute for Certified Public Accountants) / Not-for-Profit National Conference(s)	Washington DC	various	CPE TRAINING SESSIONS: Jun 02 workshop on intercompany recordkeeping in complex policy advocacy structures of various types of tax exempts; Jun 03 workshop on operational aspects of 501(h), moderator of panel on issues in public policy advocacy, and participant on tax experts panel; also resource role in GAAP v. Tax, and small fundraising group issues discussions; Jun 04 workshop on lobbying across exempt organization types, moderator of tax experts panel; Jun 05 present workshops on C3/C456/PAC intercompany accounting and Issues in GAAP v. Tax, & moderate panel of tax experts; Jun 06 sessions on Operational Ethics issues, moderate panels of tax experts and panel on operational policies & procedures; co-facilitate roundtables on advocacy generally and on 527 organizations; CONSULTATION: planning committee for Jun 03, 04, 05, 06 and 07 conferences;		Jun-02	current
AICPA / Financial Executives Forum Conference(s)	San Francisco	various	CPE TRAINING SESSIONS: session on planning issues in GAAP v. Tax at Nov04 conf; panelist / moderator on Policies & Procedures and Panel on CFO Challenges at Nov 06 conf; will co-present Tandem Organizations: Management & Reporting at Nov 07 conference (C3/C456); CONSULTATION: planning committee for Nov 04 conf;		Jan-04	current
The Ocean Foundation	Washington DC	c3	CONSULTATION: assist staff with analyzing donor advised and field of interest funds compliance, as well as chart of accounts design to facilitate internal and external reporting from QuickBooks;		Feb-07	Mar-07

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Gene Takaki, Attorney at Law	San Francisco	c3/c4	CONSULTATION: discuss accounting and recordkeeping details of C3/C4 tandems as part of legal planning for client advice on formation of C4 affiliate;		Mar-07	Mar-07
Cultural Heritage Imaging	San Francisco	c3	CONSULTATION: assist with planning for public support test / end of advance ruling period; provide various tax compliance advice and explanations;		Aug-06	Feb-07
Bridges SF	San Francisco	c3	CONSULTATION: assist large local arts organization staff and board with development of policy for net assets (reserves);		Feb-07	Feb-07
Silicon Valley Toxics Coalition	San Jose	c3/c4	CONSULTATION: phone consultation to discuss new program / spinoff, details concerning fiscal sponsorship of educational activities of C4;		Feb-07	Feb-07
Tennesseans for Fair Taxation	Knoxville	c3/c4	CONSULTATION: brief consultation about Form 990 and reporting 501(h) lobbying and public support test calculation;		Jan-07	Jan-07
Trustees for Alaska	Anchorage	c3	HANDS ON INTERIM / CONSULTATIONS: assist staff and board with preparation & refinement of functional budgeting and financial reporting system and formats, melding time and billing and separate general ledger and gift tracking software; assist with recruitment and hiring of finance staff; assist with FY05 Budget and FY04 audit preparation; assist with strategic plan and advanced topics in GAAP and planning; ongoing assistance as needed;	●	Sep-03	Dec-06
Applied Research Center & Equity Action	Oakland	c3/c4	HANDS ON establish new (c)(4) affiliate; CONSULTATION: review Form 990; planning conference with staff on financial management; in 2005 on 501(h) applied to existing operations,	●	Feb-01	Nov-06
TREC (Training Resources for the Environmental Community) / Various Organizations	Seattle	c3	CONSULTATION: standing arrangement to review forms 990, and assist with public support issues with TREC assistance recipients; assist with editing assessment tools and compensation surveys; on site review and discussion of management reporting and financial procedures; assistance with procedures for fiscal sponsorship; various project support as needed / on-call; consultations on public support test; WORKSHOP day-long in Santa Fe for a dozen environmental groups on soup-to-nuts financial management questions;	●	Sep-99	Oct-06
Care Product Institute	Berkeley	c3	HANDS ON prepare formation and tax application documents for attorney review; assist with response to multiple rounds of IRS questions;	●	May-05	Sep-06
Northwest Federation of Community Organizations	Seattle	c3/c4	TRAINING SESSIONS: two-day trainings on financial management and public policy advocacy tax rules for statewide organizations from four NW states, 5/00, 10/00, 10/01, 4/02, 3/04, 4/05; CONSULTATIONS: review Forms 990 for affiliates as needed / on call, review fiscal sponsorship agreement;	●	May-99	Aug-06
Alaska Conservation Foundation	Anchorage	c3	HANDS ON INTERIM / TRANSITION STAFFING (JUL-NOV 06): close several months and completely revise reporting formats (MIP General Ledger); assist Finance Director search & training, handle FY06 audit preparation and revise year-end worksheets to improve audit trails; document system and allocation methodology; catch up various filings; prepare educational material on various tax compliance issues; assist with re-engineering role of finance within management team and organizational culture;	●	Jun-06	Dec-06
NYSSCPA (New York Society of Certified Public Accountants) / Exempt Organizations Conference(s)	New York	various	CPE TRAINING SESSIONS: present workshop on public policy tandems & triads (C3/C456/527-PAC) in Dec05; present workshop on lobbying by all types of exempt organizations Dec06;		Dec-05	Dec-06

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Foundation Center	San Francisco	c3	TRAINING SESSION: seminar on fiscal sponsorship for cooperating collections;		Nov-06	Nov-06
Oregon Primary Care Association	Portland	c3/c4	CONSULTATION: provide advice on practical details associated with establishing C4 affiliate to existing C3;		Sep-06	Oct-06
Lorman Education Services	San Francisco San Jose Sacramento San Diego Spokane Las Vegas	for profit seminar firm	CPE/CLE TRAINING: seminars: full-day Form 990 seminars, solo: May 05 & Apr 06 San Francisco, Jan 06 Sacramento, Jul 06 San Diego & Spokane, Aug 06 Las Vegas; co-present Tax Issues for Exempt Organizations seminar, co-present Jul 05 San Francisco, Jun 06 San Jose; (Lorman is a national for-profit seminar firm); participants get CPE and CLE credits when applicable;		Nov-04	Aug-06
Trauma Foundation & Health Care for All - California & Health Care for All - Calif Ed Fund	San Francisco Statewide	c3/c4	CONSULTATION: assist two C3's and one C4 in working together effectively on cost sharing arrangements, lobbying tracking and review of governance documents;		Jun-06	Jul-06
NetImpact	San Francisco	c3	CONSULTATION: assist with explanations of issues underlying Form 990;		Apr-06	Jul-06
OSCPA (Oregon Society of CPAs) / Not-for-Profit Statewide Conference(s)	Portland	na	CPE TRAINING SESSIONS: 1998 presentation on Section 501(h) lobbying allowance; May 03 presentation on advanced aspects of 501(h) strategy planning; May 06 presentation on issues in GAAP v. TAX;		May-98	May-06
Independent Living Resource Center	San Francisco	c3	CONSULTATION: with staff about application of tax rules re: charity lobbying;		May-06	May-06
Creative Commons	San Francisco	c3	CONSULTATION: assist preparation of public support facts & circumstances Form 8734 filing for advance ruling period; followup advice as needed;		Dec-04	Mar-06
Innovation Partnership	Portland	c3	HANDS-ON: contract finance director, 3 years; CONSULTATION: assist program & fundraising strategy, financial planning for startup; assist issues related to substantial contraction; assist with later installation of accounting system to QuickBooks Online;	●	Aug-00	Mar-06
US Labor Against the War	Washington DC	c4	CONSULTATION: assist staff w/ developing financial tracking to satisfy tax & mgt information needs; explain various tax concepts re: C4 & fiscal sponsorship;		Jan-06	Jan-06
California Environmental Trust	Bay Area	c3	HANDS ON: legally dissolve California nonprofit public benefit corporation;		Jun-05	Dec-05
Partners for Democratic Change	San Francisco	c3	HANDS ON INTERIM / TRANSITION STAFFING (Q4 2005): oversee 2-person department that had been functionally vacant for a quarter; lead audit preparation, catch up federal indirect cost analysis & grant reporting, assist with staff transition and arrange interim staffing for second position during interim; Blackbaud accounting software;	●	Oct-05	Dec-05
Washington Trails Association	Seattle	c3	FACILITATION: facilitate consecutive annual board retreats in 2000, 01, 02, 03, 04 and 05 to discuss governance, mission, strategic plan implementation, financial management and personal fundraising;		Oct-00	Nov-05
Northwest Health Law Advocates	Seattle	c3	CONSULTATION: assist with planning for sponsored project management;		Aug-05	Sep-05
TACS / Community Nonprofit Resource Group	Portland	c3	CONSULTATION: assist with response to IRS questions on tax exemption application;		Jun-05	Jul-05
TACS / WA Domestic Violence Program	Portland	c3	CONSULTATION: subcontract to prepare spreadsheet template to allocate funding according to complex group-negotiated formula; ongoing support;		Jul-95	Jun-05
Silk, Adler & Colvin	San Francisco	for profit	TRAINING SESSIONS: (former employer) for new paralegals, client finance specialist, and other staff as needed;		Jul-04	Jun-05

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Progressive Leadership Alliance of Nevada	Reno & NV Statewide	c3/c4	CONSULTATION: assist with planning and implementation options discussion for possible creation of an affiliated C4 to a C3 statewide progressive coalition; review Form 990;	●	Nov-04	May-05
Elliott Buchdruker, CPA	San Francisco	c3	CONSULTATION: assist with commerciality assessment of a particular client; research tax status of similar organizations;		May-05	May-05
United Camps, Conferences & Retreats	San Rafael, CA	c3	CONSULTATION: to discuss UBI aspects of proposed change in part of operations;		May-05	May-05
MoveOn	Berkeley	c4 / 527	CONSULTATION: prepare CEO compensation analysis;		Apr-05	Apr-05
Nick Wilson Charitable Group	Portland	c3	CONSULTATION: review form 1023, discuss options;		Apr-05	Apr-05
Chintu Gudiya Foundation	San Francisco	PF	CONSULTATION: research & memos on Patriot Act implications for foreign giving and on commerciality issues with software startup;		Mar-05	Mar-05
MBA Nonprofit Connection	San Francisco	c3	CONSULTATION: assist with preparation of public support analysis;		Sep-04	Mar-05
SUBUD	California	c3	CONSULTATION: assist long-time religious/spiritual corporation's officers with unthreading current corporate and tax classifications that the corporation pre-dates, and consider optimal forward approaches; also consult regarding tax reporting of rental income;		Jan-05	Jan-05
Fontanello, Duffield & Otake, CPAs	San Francisco	c3 / c4 / 527	TRAINING SESSION: seminar with staff on political tax law and tandem / triad issues focused on one particular client and the law generally;		Jan-05	Jan-05
Jeff Leighton, CPA	Bay Area	c3	CONSULTATION: assist Mr. Leighton with analysis of dormant subsidiary nonprofits to a hospital conversion foundation and plan for consolidating assets & closing dormant entities;		Dec-04	Jan-05
Neighborhood Learning Center	Clackamas OR	c3	CONSULTATION: public support analysis for advance ruling period, Form 8734;		Sep-04	Jan-05
J.L. Center Stage	Bay Area	c3	CONSULTATION: public support analysis for advance ruling period, Form 8734;		Jan-05	Jan-05
Oakland Interfaith Gospel Choir	Oakland	c3	CONSULTATION: discuss appropriate disclosure language and internal procedure on tax compliance issues;		Oct-04	Oct-04
PACE (Philanthropy for Active Civic Engagement, formerly Grantmaker Forum on Community & National Service)	Berkeley	c3	CONSULTATION: prepare public support analysis for advance ruling period; prepare review of Form 990		Aug-04	Sep-04
Friends of the Children	Portland	c3	CONSULTATION: assist with preparation of public support analysis;		Aug-05	Sep-04
TREC / Trustees for Alaska	Anchorage	c3	CONSULTATION: assist staff and board with evaluation of law firm time-and-billing oriented general ledger software ability to perform nonprofit program tracking '99; '03/04 assist staff and board with preparation of functional budgeting and financial reporting system and formats, melding TimeSlips time and billing and separate QuickBooks general ledger and gift tracking software;	●	Sep-99	Aug-04
Jody Blazek, CPA	Houston	c3	CONSULTATION: discuss reporting requirements for complex foundation support for advocacy;		Jul-04	Jul-04
CalCPA (California Society of CPAs) Nonprofit Interest Group, Northern California Section	San Francisco	na	CPE TRAINING SESSION: Sep 01 presentation on public charity status and public support tests calculation; Jan 04 presentation on issues of GAAP vs. Tax in nonprofit accounting;		Sep-01	Jan-04
Asian Pacific Islander American Health Forum	San Francisco	c3	CONSULTATION: review and discussion of internal financial reporting systems; assist with design and conduct of search for new Finance Manager;		Jul-02	Aug-03

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Children Now	San Francisco	c3	CONSULTATION: review and discussion of internal financial reporting systems, chart of accounts, and cost allocation methodologies;		Mar-03	Apr-03
Sacramento Valley Open Space Conservancy (Land Trust)	Sacramento	c3	CONSULTATION: prepare memorandum and suggestions on internal financial procedures, reporting, and controls; assist in redesign of chart of accounts, cost allocation methodologies, and software upgrade; meet with Board and finance committee to discuss new systems;		Jun-02	Jan-03
Northern Plains Resource Council	Billings, MT	c3	CONSULTATION: assist with explanation of functional accounting cost allocations for 990 preparation; review draft Form 990;		Apr-02	Nov-02
Haile Girma, CPA	Oakland	c5	CONSULTATION: review draft form 990 for a labor organization;		Nov-01	Nov-02
Idaho Women's Network & IWN Research and Education Fund	Boise	c3/c4	CONSULTATION: site visit and prepare memorandum and suggestions on internal financial procedures, reporting, and controls;		Jul-02	Oct-02
CompassPoint Nonprofit Services	San Francisco	c3	CONSULTATION: conference with staff on preparation of training material regarding Form 990; TRAINING SESSIONS on fiscal sponsorship and 501(h) lobbying rules;		Oct-00	Oct-02
Aspen Institute / Watershed Research and Training Center	Hayfork, CA	c3	CONSULTATION: assist board and management with preparing financial reporting system to clarify questions and better tie reports to strategic plan; TRAINING SESSION work with board to understand and interpret new reporting format;		Jan-02	Aug-02
Portland Schools Foundation	Portland	c3	CONSULTATION: assist development and implementation of cost centers and cost allocation policies in preparation for new initiatives; assist senior management with planning for initiatives; assist with hiring bookkeeping staff and selection of sophisticated general ledger software; provide budget model and assist with adaptation;	●	Sep-99	Jul-02
Voz Hispana Causa Chavista	Woodburn, OR	c4	CONSULTATION: review and mark up Form 1024 application for recognition of c4 exemption;		Jun-02	Jun-02
PolicyLink	Oakland	c3	CONSULTATION: assist with development and format of chart of accounts in QuickBooks, cost allocation policies, selection of MIP accounting software, preparation functional allocations;	●	Aug-99	May-02
Hispanics in Philanthropy	Berkeley	c3	CONSULTATION: assist with chart of accounts design and cost center identification;		Jul-01	Aug-01
National Institute on Money In State Politics	Helena, MT & Portland	c3	CONSULTATION: assist with chart of accounts design, budget model refinement, and fiscal year definitions for funder reporting; assist with construction of historical financial recap combining sponsored project with newcorp;		Jan-00	May-01
GreenInfo Network	San Francisco	c3	CONSULTATION: review and discuss public support test issues;		Apr-01	May-01
California Center for Land Recycling	San Francisco	c3	HANDS-ON INTERIM: acting finance director using Blackbaud accounting; maintain general ledger, payroll and payables, and financial reporting systems; CONSULTATION assist with format of chart of accounts and development of cost allocation policies; assist with program and fundraising planning;	●	Apr-99	Mar-01
Nonprofit Assistance Center	Seattle	c3	TRAINING SESSION: public workshop, moderate panel, on fiscal sponsorship;		Feb-01	Feb-01
TACS / Umpqua CDC	Portland	c3	CONSULTATION: subcontract to prepare spreadsheet template to allow for client modeling of childcare center revenue and expense variables;		Nov-00	Jan-01
California Certified Organic Farmers	Santa Cruz, CA	c5	CONSULTATION: assist staff with preparation for board retreat on options for dealing with new USDA rules on conflict of interest;		Jan-01	Jan-01

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Million Mom March & Million Mom March Foundation	San Francisco	c3 / c4	CONSULTATION: assist with development of financial policies for managing regional offices around the country; HANDS-ON: scanning tax filings for www disclosure posting;		Apr-99	Nov-00
Oregon Graduate Institute / Saturday Academy	Portland	c3	CONSULTATION: discuss business models and overhead costs with CEO of a semi-autonomous program within a larger educational institution;		Oct-00	Oct-00
Institute for Fisheries Resources	San Francisco	c3 / c5	CONSULTATION: to synthesize a number of program manager's budgets into one master budget and analyze for available administrative funding; assist with chart of accounts design, cost allocation policies, and budget model refinement;		Apr-00	Jul-00
Californians for Responsible Gun Laws	Berkeley	c4	HANDS-ON: preparation of tax and charitable trust reports; CONSULTATION: strategic planning around c3/c4 aspects of funding;		Jun-96	Jun-00
Association for Portland Progress	Portland	c3 / c6	CONSULTATION: assist with ongoing modifications to property assessment formula for downtown management district; HANDS-ON: lead role in development of FY 98 budget; assist with transition between CFOs and supervision of technical staff;	●	Mar-97	Dec-99
TACS / OR Council for Hispanic Advancemnt	Portland	c3	CONSULTATION: subcontract to synthesize a number of program manager's budgets into one master budget and analyze for available administrative funding;		Aug-99	Sep-99
Western States Center / CSTI	Portland	c3	TRAINING SESSIONS: financial management overview / one- and two-day workshops, 9 years, approximately 20 groups per year;		Sep-91	Jul-99
Alaska Conservation Foundation	Anchorage	various nonprofit	TRAINING SESSION: two day financial management training for thirty environmental groups from around the state;		Nov-98	Nov-98
Artists for a Hate Free America	Portland	c4	HANDS-ON: bookkeeping & finance director services using QuickBooks; CONSULTATION: business planning -- merchandise venture; assist with preparation of plan;	●	Oct-95	Jan-98
Western States Center	Portland	c3	HANDS-ON: acting fin dir 9 mos using ACCPAC BPI general ledger; CONSULTATIONS: cost ctr/line item, bud & and cost alloc policy design; select, install & configure g/l software; brief Board occasionally; assist with hiring FT fin dir; train & guide fin dir; train succeeding fin dir;	●	Feb-87	Jul-97
Trauma Foundation	San Francisco	c3	TRAINING SESSION: tax compliance - lobbying regulations; CONSULTATION: lobbying cost tracking systems review;		Jan-96	Feb 96
Livable Oregon Inc. (formerly OR Downtown Devp Assoc)	Portland	c3	HANDS-ON: actual monthly bkpg and reporting on Peachtree for Macintosh; ASSESSMENT: finan mgmt assessment & rpt; CONSULTATIONS: cost ctr/line item, bud model & cost alloc policy design; select, install & configure g/l software; TRAINING SESSION: finan mgt overview statewide mainstreet mgrs;	●	Mar-95	Jul-96
City Center District	San Francisco	c6	CONSULTATION: prepare form 1024;		May-96	Jun-96
River Network	Portland	c3	CONSULTATION: review (c)3/(c)4 handbook for legal changes since 1991; ASSESSMENT: financial management assessment & report;		Jul-95	Apr-96
New Mexico Community Foundation	New Mexico Statewide	various nonprofit	TRAINING SESSIONS: four full-day workshops around the state, nonprofit financial management overview, 130 attendees in 4 days; CONSULTATION: half day briefing for key people at Colonias Development Council in Las Cruces on financial management issues;		Mar-96	Mar-96
Native Seeds SEARCH	Tucson, AZ	c3	HANDS ON installation, configuration, & staff training on ACCPAC BPI; ASSESSMENT: financial management assessment & report; CONSULTATIONS: cost center/line item, budget model, and cost allocation policy design; computerized general ledger selection;	●	Aug-95	Jan-96

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Oregon Health Access Project & Oregon Health Action Campaign	Salem, OR	c3 / c4	CONSULTATIONS: tax compliance: assist with drafting governing documents for both corporations; assist with preparation of applications for recognition of exemption; brief board and staff on proper procedures; ongoing tax compliance support;		Jul-94	Jan-96
North Carolina Alliance for Democracy & Democracy South	Chapel Hill, NC	c3 / c4	CONSULTATION: tax compliance: prepare briefing paper on lobbying regulation for (c)3 members of (c)4 coalition (NCAD); assist with preparation of applications for recognition of exemption;		Aug-95	Oct-95
Advanced Impressions	Portland	for profit	CONSULTATIONS: profit center/line item design; system installation ACCPAC BPI, training; ongoing assistance to management;		Jan-90	Feb-96
Schultz & Crouse CPAs / OR Medical Professional Review Organization	Portland	c3	CONSULTATION: subcontract to prepare assessment and overview of information technology needs, recommendations & report;		Aug-95	Aug-95
Columbia Cardiology Associates	Portland	for profit	HANDS-ON: develop Reflex database for writing letters scheduling pacemaker checkups; periodic updates;		Jan-92	Aug-95
TACS / Alvord-Taylor Inc.	Eugene, OR	c3	CONSULTATION: subcontract to review current cost center and line item definitions, reporting requirements, design new chart of accounts, cost allocation policies;		Feb-95	Aug-95
Everywoman's Health Care	Portland	for profit	HANDS-ON: select & install PC, transfer existing software and data to workalike; CONSULTATION: basic lotus print training;		Sep-93	Aug-95
Gardner Stussi Tool & Die	Portland	for profit	HANDS-ON: contract bookkeeper, 10 years, ACCPAC BPI general ledger; CONSULTATIONS: train staff to run at the end; prepare Boeing contract proforma on overhead costs;	●	Aug-84	Aug-95
Sabin Community Development Corporation	Portland	c3	CONSULTATION: assist with chart of accounts design and cost allocation policies;		Jul-95	Jul-95
Washington State Downtown Revitalization Program	Olympia, WA	c3 / c6	TRAINING SESSION: financial management & budgeting for statewide gathering of mainstreet leaders;		Mar-95	Mar-95
Michigan Environmental Council	Lansing, MI	c3	ASSESSMENT: financial management assessment & report; CONSULTATIONS: cost center/line item & cost allocation policy design; select, install, configure g/l software & train staff; HANDS-ON: compile one full year's books;	●	Jan-95	Mar-95
Hoosier Environmental Council	Indianapolis	c3 / c4	ASSESSMENT: financial management assessment & report; CONSULTATION: chart of accounts & budget template preparation; train staff on Quattro Pro; FACILITATION: board briefing;		Feb-95	Feb-95
Central Dallas Association	Dallas	c3 / c6	ASSESSMENT: financial management & organizational structure assessment & report;		Dec-94	Dec-94
Idaho Citizens Network	Boise	c3	ASSESSMENT: financial management assessment, budget crisis appraisal & options & report; historical financial analysis preparation;		Dec-94	Dec-94
Oregon Country Fair	Eugene, OR	c3	FACILITATION: discussion of investment / venture options with Board;		Nov-94	Nov-94
Environmental Support Center / State Enviro Leadership Conf	Phoenix	c3	TRAINING SESSION: budgeting overview for state leaders from 50 states;		Nov-94	Nov-94
Institute for Southern Studies / Democracy South	Chapel Hill, NC	c3	CONSULTATION: tax compliance re: spinoff of new (C)(3) & related (C)(4);		Aug-94	Sep-94
Downtown Seattle Association	Seattle	c3 / c4	ASSESSMENT: financial management assessment & report; CONSULTATIONS: brief bookkeeper on nonprofit accounting & downtown management field; review budgets for new CEO;		Jun-94	Sep-94

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Public Interest Projects, Inc. / The Asheville Fund	Asheville, NC	c3	CONSULTATIONS: review business plan; consultation on tax compliance / spinoffs;		Jun-94	Jun-94
Community Foundation of Western North Carolina (CFWNC)	Asheville, NC	c3	TRAINING SESSION: financial management overview and tax & regulatory issues for 15 local nonprofits--training sponsored by foundation;		Dec-93	Apr-94
CFWNC / Clean Water Fund North Carolina	Asheville, NC	c3	HANDS ON install and configure ACCPAC BPI accounting; CONSULTATIONS: strategic business planning for subsidiary venture;	●	Dec-93	Apr-94
CFWNC / Western North Carolina Alliance	Asheville, NC	c3	CONSULTATIONS: chart of accounts & financial reporting format design, board briefing;		Dec-93	Apr-94
CFWNC / Citizens for Quality Development	Asheville, NC	c3	CONSULTATION: fundraising planning; tax compliance / payroll taxes;		Dec-93	Apr-94
CFWNC / North Carolina Alliance for Transportation	Asheville, NC	c3	CONSULTATION: tax compliance - public support; chart of accounts design;		Dec-93	Apr-94
Portland Association of Teachers	Portland	c5	CONSULTATION: prepare analysis of school district budget & proposed cuts, coach leadership on developing alternate budget proposal;	●	Jan-94	Feb-94
Joint State Employers Council	Portland	gov't	TRAINING SESSION: tax exemption / nonprofit briefing for board;		Nov-93	Nov-93
Downtown Partnership of Baltimore	Baltimore	c3 / c6	CONSULTATION: brief assessment & financial management discussion with staff;		Nov-93	Nov-93
CLEC Canvass	Seattle	c3	TRAINING SESSION: budget training for canvass field directors;		Apr-92	Apr-93
Washington Citizens Alliance	Seattle	c3 / c4	CONSULTATIONS: bookkeeper briefing/training;		Feb-93	Feb-93
A Territory Resource	Seattle	c3	FACILITATION: board training on financial reporting;		Nov-92	Nov-92
Schultz & Crouse, CPA's	Portland	for profit	CONSULTATION: time & billing template update;		Mar-87	Aug-92
Victoria Jeans Gail Bookkeeping Service	Portland	for profit	CONSULTATION: BPI reports exporting to word processing file;		Jul-92	Jul-92
Oregon Graduate Institute	Portland	c3	CONSULTATION: review health department restaurant rules, prepare report regarding school's informal lunch counter operation;		May-90	May-90
Berg Wholesale Hardware	Portland	for profit	CONSULTATIONS: pc troubleshooting;		Jul-87	Feb-90
Pacific Learning Systems	Portland	for profit	CONSULTATIONS: financial analysis: costs/breakeven; sales contact database; State-of-the-Art (now MAS 90) actg sys install & train on report design;		Oct-85	Mar-89
Goodrich Forest Products	Portland	for profit	CONSULTATIONS: DOS/batch files, PC hardware configuration;		Dec-88	Dec-88
TV Host Magazine	Portland	for profit	CONSULTATION: select, install accounts receivable software & train staff;		Dec-86	Jun-88
Blue Mountain Computer	Enterprise, OR	for profit	CONSULTATIONS: review business planning;		Aug-86	Mar-88
Phoenix Rising	Portland	c3	CONSULTATION: find subcontractor to convert CP/M data to DOS; HANDS-ON: assist with compilation of year's books;		Feb-87	Nov-87
Northwest Rehabilitation Associates	Portland	for profit	CONSULTATION: PC troubleshooting, training;		Jul-87	Aug-87
Cascade AIDS Project	Portland	c3	CONSULTATION: select PC FUND software, design chart, install, configure & train staff;		Dec-86	Jun-87
YWCA - Portland	Portland	c3	CONSULTATIONS: financial troubleshooting, assessment, board briefing on budget balancing options;	●	Apr-85	May-87
Woodland Park Hospital / Women's Health Link	Portland	for profit	CUSTOM DATABASE DEVELOPMENT: database design for information and referral resource library;		Dec-86	Mar-87
Woodland Park Hospital / Cosmetic Surgery Center	Portland	for profit	CUSTOM DATABASE DEVELOPMENT: design database for tracking client inquiry & followup; CONSULTATION: hardware selection & installation;		Dec-86	Mar-87

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Pacific Power & Light / Power Operations Division	Portland	for profit	CONSULTATION: develop budget template: identical (line item) departments to combine into master budget for power operations division;		Dec-86	Mar-87
HealthWeek	Portland	for profit	CONSULTATION: assist with subscription acquisition model spreadsheet as part of business plan;	●	Jun-86	Mar-87
Angel, Crouse & Company, CPA's	Portland	for profit	CONSULTATIONS: misc client sub-contracts & compilations, develop client due date system - custom spreadsheet template application with macros;	●	Apr-86	Jan-87
Motorsports International Auto Sales	Portland	for profit	HANDS-ON: run full year books for tax purposes; train contractor;	●	Dec-85	Jan-87
West Coast Picture Corporation	Portland	for profit	CONSULTATIONS / HANDS-ON: debug local custom accounting software, design system to cope with bug, train bookkeeper;	●	Aug-84	Mar-86
U-Develop Rental Darkrooms	Portland	for profit	CONSULTATION: prepare financial analyses & graphs of prior years' financial performance & financial ratios;		Jun-85	Feb-86
Carl Ylvisaker Physical Therapy	Portland	for profit	CONSULTATION: recreate full years' books from bank microfilm copies following calamity loss of records;		Oct-84	Mar-85