

**Terry Miller**  
156½ FAIRMOUNT STREET  
SAN FRANCISCO, CA 94131  
415 824 4705  
terry@terrymiller.biz

**Objective:** Apply my broad experience, skills and judgment in a senior management role in a San Francisco based organization addressing social and economic justice or personal and environmental sustainability. My overarching passion is to make financial information accessible as part of strategic management.

---

Nonprofit / exempt organization finance and tax professional with over 20 years' experience and a current leadership role in the field of nonprofit accounting and tax compliance nationally

- Cost allocation expert, including Federal OMB A-122 cost principles; adept at constructing integrated spreadsheet models that make information clear to management, accommodate rapid changes, and achieve maximum cost recovery from funding sources
  - Expert in key areas of tax law applied strategically including public charity status, Form 990, current legal and regulatory environment and changes, and lobbying and electioneering
  - Accomplished speaker and presenter, from individual boards up through national professional conferences; recognized leader in the field of continuing professional education
  - Articulate, enthusiastic, energetic and strategically engaged
  - Technologically savvy and accomplished with current skills in MIP, Blackbaud and QuickBooks, and past skills with precursors or earlier versions of Fundware, MAS 90, ACCPAC Plus, Peachtree, MYOB, ACCPAC BPI
- 

**Consultant & Trainer: Financial Management & Tax Compliance**

**1984-Present**

Worked with various midsize and small nonprofits in engagements ranging from 600 hours to 1 hour; scalable practice with no current ongoing commitments. (Summary list of all engagements available.)

- Successful hands-on interim/transitional finance director positions using Blackbaud and MIP in the last 18 months, catching up clients in preparation for a final hire
- Prepared cost allocation policies, methodologies, and budget models tied to strategic plans
- Developed and refined financial report formats to make management information obvious
- Extensive public workshops, seminars and training, for professionals and single boards
- Prepared numerous public support tests and provided general tax explanations
- Prepared and submitted several successful tax exemption applications
- Reviewed and commented on Forms 990, improving reporting for dozens of small nonprofits
- Analyzed mismatched Federal Negotiated Indirect Cost Rate bases vs. recordkeeping practice

**Senior Paralegal / Client Finance Administrator**

**1996-2004**

*Silk, Adler & Colvin, San Francisco*

Worked directly with clients and partners on a wide range of tax and corporate legal issues in the nonprofit sector, while developing depth and expertise in tax law and corporate governance.

- Handled corporate formations and tax exemption applications for a wide variety of nonprofits
- Calculated public support tests and handled filings
- Reviewed Forms 990
- Assisted clients with corporate governance (minutes, resolutions, bylaw amendments)
- Prepared a dozen charitable remainder trust tax returns annually
- Trained new staff including associate attorneys
- Maintained forms and created various internal systems

**Director of Finance & Administration****1996***Basic Rights Oregon*

Led financial and administrative functions in 1996 as part of a small campaign organization working to 1) defeat initiatives encouraging discrimination based on sexual orientation, and 2) educate the public in order to combat the 'no special rights' argument.

- Supervised the financial and administrative aspects of the organization including selection of a vendor and overseeing preparation of period campaign finance reports
- Guided discussions to create an ongoing corporate structure to place BRO in a position to engage in a full range of tax-exempt activity as it worked to ensure basic rights for Oregonians

**Chief Financial Officer****1990-1995***Association for Portland Progress, Portland, Oregon*

Served as one of three-person Executive Team for pioneering \$6M nonprofit business league / charity tandem, engaged in a variety of downtown management functions in Portland's now thriving downtown.

- Developed annual budgets to recover maximum costs, and guided 7-person management team through balancing process
- Developed complex rate formulas and legal strategies related to our own assessment district
- Monitored and controlled spending variances from budget
- Handled financial communications with the Boards of Directors and staffed the CEO
- Supervised accounting staff of four
- Negotiated contracts, insurance, oversaw tax and legal questions and cash management
- Designed enriched benefits package as part of recruitment and retention strategy
- Administered LAN and IT consultants, oversaw IT investment

**Program Director, Financial Management Training Program****1987-1992****Office Manager / Grants Administrator****1984-1987***The Youth Project, Portland, Oregon (DC-based organization)*

Conceived, created and ran a groundbreaking financial management training program for grassroots organization grantees of The Youth Project. Previously, I supported two Western field staff with administrative details. The Youth Project was a groundbreaking funder providing grant support and technical assistance to grassroots community-based organizations in all fifty states.

- Delivered tutoring training and developed curriculum to improve community-based organizations' practices in
  - Planning & Budgeting
  - Tax Compliance with particular regard to public policy advocacy
  - Recordkeeping & Reporting
  - Governance, Control & Staffing; and Computerization
- Administered the grantmaking process (contracts, checks, reports)
- Maintained office operations for a small field office serving the Western states

**CPA Practice Administrator****Tax Season 1983/84***Kingsland, Schultz & Co, CPA's, Portland*

- Implemented new billing software and trained staff
- Managed receivables and work-in-process tracking
- Assisted with the firm's own financial statements
- Structured one client bankruptcy during this period

**Business Manager, Storefront Actors' Theatre, Portland****1983****Staff Accountant, Willamette Week Newspaper, Portland****1980-1982****Office Manager / Campaign Staff, Henry Richmond for Attorney General, Portland****1980**

**Canvasser**, then **Office Manager**, *Oregon Fair Share (community organizing)*, Portland 1978-1980

**College** (1973-77) and **Earlier** (1970-73) **Internships** and summer employment

Antioch College is known for alternating periods of work and study as part of its pedagogical model

<b>Policy Research Intern</b> , <i>Iowa State Treasurer Maurice Baringer (R)</i> , Des Moines	1976
<b>Rental Car Shuttle Driver</b> ( <i>Teamster</i> ), <i>Avis Rentacar</i> , San Francisco	1975
<b>Apartment Manager</b> , <i>16 Units</i> , Anchorage	1974
<b>Retail Clerk</b> , <i>McKay's Hardware</i> , Anchorage	1972-1973
<b>Campaign Volunteer</b> , <i>McGovern for President</i> , 30 hrs/week, Anchorage	1972
<b>Law Firm Messenger &amp; File Clerk</b> , <i>full-time, summers</i> , Anchorage	1968-1970

---

## **EDUCATION**

M.B.A, University of Portland, 1984

B.A., Antioch College, 1977

## **PUBLICATIONS & PRESENTATIONS**

**Author** of *Navigating the Tax Implications of Earned Income*, chapter in Selling Social Change (Without Selling Out), Andy Robinson, Jossey Bass, 2002.

**Author** of MANAGING FOR CHANGE: A Common Sense Guide to Evaluating Financial Management Health for Grassroots Organizations, self-published, 1990, 1992

**Presenter / trainer**, seminars and workshops including topics below, 1980-2006

- Form 990: Critical Issues
- GAAP v. TAX: When Worlds Collide
- Organizational Ethics: Tuning Up Your Sensitivity
- Public Charity Lobbying: Advanced 501(h) Strategies
- Lobbying by [all types of] Exempt Organizations
- Advocacy-oriented Inter-entity Tandems & Triads: C3 / C4 / 527
- Public Charities & the Public Support Tests
- Fiscal Sponsorship
- Integrated Budget Model Template and Sample Cost Allocation Policy

List of public presentations available, and various curricula on website: [www.terrillmiller.biz](http://www.terrillmiller.biz)

## **BOARDS & MEMBERSHIPS**

Director & Audit Committee, Rockwood Leadership Program, Berkeley ([www.rockwoodleadership.org](http://www.rockwoodleadership.org))

Director & Treasurer, Foresight Institute [*nanotechnology*], Menlo Park ([www.foresight.org](http://www.foresight.org))

Audit Committee (pending), Applied Research Center [*race & social justice*], Oakland ([www.arc.org](http://www.arc.org))

Planning Committee, AICPA National Not-for-Profit Industry Conference, Washington D.C. (5<sup>th</sup> Yr)

Member, Commonwealth Club of California, San Francisco

Member, Finance Professionals Network, CompassPoint Nonprofit Services, San Francisco

Member & Informal Advisor, San Francisco Bicycle Coalition

Informal Advisor, Options: A Benefits Training Foundation [*disability training*], San Francisco