



Butler Business Solutions Ltd.

Charlene D. Butler MBA, BComm, BSc, RIMS Fellow

Cell: 780.237.0708

email: Charlene@butlerbusiness.ca, cbutler@butlerbusinessolutions.com

PROFESSIONAL EXPERIENCE SUMMARY

Charlene is a management consultant with over 30 years experience assisting public and private sector organizations with strategic business planning, evaluation framework development and execution, non-financial risk management and organizational performance optimization.

She holds a Masters in Business Administration (MBA) specializing in Natural Resources, Energy and the Environment, a Bachelor of Commerce (BComm) in Insurance and Risk Management, a Bachelor of Science (BSc) in Actuarial Science and a Chemical Technology diploma (CHT). In addition Charlene is a RIMS Fellow (Risk and Insurance Management Society). Charlene has 25 years of senior management experience in the petroleum, insurance/risk management and government sectors.

Charlene's education and experience have provided her with strong analytical, stakeholder engagement, facilitation, research, problem solving skills, and communication skills. Areas of specialization include:

- Risk Management (non-financial)
- Evaluation Framework Development and Completion of Evaluations
- Process Evaluation
- Business Planning
- Strategic Planning

Charlene is a result oriented, strategic thinker with a proven ability to understand and meet the needs of diverse stakeholder groups.

WORK EXPERIENCE

29. City of Edmonton, Council Initiative on Public Engagement Evaluation, Reporting and Recognition Working Group Member

12 2015 – present

Public Engagement is a fundamental component of local government. The importance of engaging Edmontonians in the good governance of their City is identified in *The Way Ahead* and the City's Strategic Plans. Public engagement is also a key component for making the City's Leadership Principles come alive in how the City plans, implements, and evaluates its policies, programs, and services. The Public Engagement Advisory Committee has been created to:

- Oversee and champion the implementation of a strategy to improve the City of Edmonton's



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public engagement;

- Identify issues of interest and relevance public engagement in the City of Edmonton;
- Establish and co-ordinate the work of specific working groups and involve others to implement a strategy to improve the City of Edmonton's public engagement;
- Assist in public engagement communication efforts.

The role of the Evaluation, Reporting and Recognition working group is to establish the reporting and evaluation mechanisms needed to benchmark, assess, share, promote and celebrate innovative public engagement work.

Skills/Expertise Included:

- Evaluation
- Public Engagement

Deliverables Included:

- Development of a multi- year public engagement evaluation process and all key metrics
- Development of a reporting schedule and process
- Ensuring that the evaluation aligns with the goals of the Council Initiative and the 4 other working groups, and the City's strategic plan
- Other deliverable still under development

28. REACH Edmonton

08 2015 – 09 2015

24/7 Mobile Assistance Program (MAP)

(2 months)

Evaluator

The 24/7 MAP responds to people in crisis: 24 hours a day, 7 days a week. 24/7 MAP receives referrals from Edmonton Police Service and EMS to respond to people in non-emergency crisis. The team provides on-the-spot help and connects people with the services they need - a home or mental health worker - so they can move toward independence and rebuilding their lives. Completed a Social Return on Investment (SROI) evaluation that demonstrated the social value created by the 24/7 MAP

Responsibilities included:

- Development and monetization of metrics
- Completion of the SROI evaluation

Skills/Expertise Included:

- Evaluation
- Research

Deliverables Included:

- Actual SROI based on current program
- Forecast SROI that incorporates program changes currently being considered



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27. REACH Edmonton

08 2014 – 12 2017

WrapED

(41 months)

Evaluator, Sustainability Committee Facilitator, Business Plan Developer

Wraparound Edmonton, or WrapED, is a partnership of six Edmonton organizations working together to help young people (between 12 and 17 years of age) affected by violent crime move away from the threat of gangs and learn to thrive in our community. Completing a Social Return on Investment (SROI) evaluation of the WrapED Project. Activities include extensive stakeholder and partner engagement to determine key metrics, monetization of metrics, development of quantitative data collection tools and facilitation of data collection, data analysis and report development. The SROI framework ensures limited investment dollars are spent on providing those programs and services that produce the most value for Alberta clients. Responsible for the establishment of and chairing of a sustainability committee, which will develop a business and sustainability plan to ensure the program continues past 2018

Responsibilities included:

- Development of metrics and completion of the SROI
- Ensuring that the SROI meets the goals and objectives of the partner organizations and the funder
- Establishment of the sustainability committee and recruitment of members
- Chairing the sustainability committee
- Development of the sustainability and business plans including implementation and budget

Skills/Expertise Included:

- Evaluation
- Facilitation and leadership
- Business and sustainability plan development

Deliverables Included:

- SROI evaluation
- Creation of a sustainability committee
- Business and sustainability plan

26. Edmonton Homeless Commission

09 2013 – 06 2015

Youth Training Project

(22 months)

Business Plan Developer

Edmonton's Homeless Commission wishes to reduce immediate youth homelessness and prevent future homelessness through educational support and client centric programming that provides youth with the education, skills and knowledge needed to successfully transition to adulthood. Conducted interviews with front line service providers, facilitated focus groups with youths meeting the demographic, and hosted meetings with educators. Based on information collected and research on best practices worldwide, feasibility and business plans were completed that recommend that a facility, the Youth Training Centre (YTC), be built and operated. The YTC will house youth who are



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motivated to restart or continue their education or employment related training and complete life skills training tailored to their specific needs

Responsibilities included:

- Stakeholder engagement
- Interviews with youth service providers
- Facilitation of large community meetings
- Facilitation of youth focus groups
- Recruitment of Architect
- Ongoing engagement with the Government to make sure the plan met their objectives
- Completion of the feasibility plan and business plan
- Coordination with KPMG (funding model developer) and architect

Skills/Expertise Included:

- Facilitation and interview
- Research
- Business plan development

Deliverables Included:

- Summary of all stakeholder meetings and interviews and development of recommendations for the business plan
- Feasibility and business plans including a budget and a P4 funding model
- Presentation and summary reports for stakeholder and community meetings

25. Alberta Auto Insurance Rate Board (AIRB)

06 2012 – Present

Board Member

Appointed by the Government of Alberta in 2012. The primary role of the AIRB is to regulate automobile insurance rating programs for private passenger vehicles for both basic and additional coverage in Alberta. The Board's vision is to foster an efficient and effective automobile insurance market with fair and predictable rates

Skills/Expertise Included:

- Understanding of the insurance industry and rating systems
- Insurance company, broker and consumer relationships
- Actuarial
- Governance

Deliverables Included:

- Review all insurance company rate changes as submitted



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24. University of Alberta – Alberta School of Business

01 2013 – 03 2014

MBA Curriculum and Program Evaluation

(15 months)

Evaluator and Facilitator

Facilitated a series of focus groups and interviews with key Canadian businesses, MBA students and MBA graduates to determine and prioritize the skills, education, competencies etc., Canadian businesses are looking for in an MBA graduate. This information was provided to the Alberta School of Business who used it to make informed curriculum change decisions, as the School must ensure that its programming meets current business needs

Responsibilities included:

- Question development and the completion of interviews and focus groups with businesses, students and alumni across Canada
- Research on other Canadian MBA programs and comparison with U of A
- Evaluation and prioritization of recommendations
- Completion of summary report

Skills/Expertise Included:

- Research
- Interview and survey question development
- Stakeholder engagement
- Interview and facilitation

Deliverables Included:

- Interview and survey question development
- Summary report and prioritized recommendation

23. Alberta Mental Health Foundation (MHF)

06 2012 – Present

Trustee, Acting Chair and Vice Chair, Chair Human Resources and Governance Committee

Appointed by the Government of Alberta to the MHF in 2012. The focus of the foundation is to raise money to support programs, services, and or research that assist those struggling with mental health and or addiction issues find needed support and resources

Responsibilities included:

- Acting Chair and Vice Chair of the Board
- Chair of the Human Resources and Governance committee
- Member of the Audit and Investment committee

Skills/Expertise Included:

- Board Governance
- Risk Management

Deliverables Included:

- Development of all policies and procedures
- Review and rewrite of the bylaws
- Development of the strategic plan



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- Risk Management assessment
- Annual Board and ED evaluations

22. REACH Edmonton

02 2011 – 04 2014

Schools as Community Hubs and Cultural Community Groups

(39 months)

Researcher, Evaluator, Business Plan Developer

Completed Social Return on Investment (SROI) evaluations of three Safe Communities Innovation Fund (SCIF) funded projects: Schools as Community Hubs, Aboriginal Leadership Group, and the REACH Immigrant and Refugee Initiative. The project involved extensive facilitation with in excess of 12 non-profit partner organizations and their clients, and the evaluation of over 15 individual programs. Other activities included determination of key metrics and monetization of metrics where applicable, development of quantitative and qualitative data collection tools, facilitation of data collection, data analysis and report development. The SROI framework ensures limited investment dollars are spent on providing those programs and services that produce the most value for Alberta clients. In addition business plans were developed for all 3 projects in consultation with the partner organizations

Responsibilities included:

- Stakeholder engagement to determine key quantitative and qualitative metrics
- Development of metrics and monetization of quantitative metrics
- Development of interview questionnaires to facilitate data collection
- Completion of 3 SROI evaluations and reports
- Engagement with program providers on future programming
- Development of 3 business plans including budgets and funding options

Skills/Expertise Included:

- Research
- Stakeholder engagement and facilitation
- Evaluation
- Business plan development

Deliverables Included:

- Data collection questionnaires
- 3 SROI evaluations and reports
- 3 Business plans

21. Edmonton Police Services

07 2011 – 11 2011

Succession and Talent Management Plan

(5 months)

Interviewer and Plan Developer

Completed succession plans for both the sworn officers and civilian directors of EPS. Interviewed all senior team members to determine their future goals and positional aspirations, examined who could take over their roles and collected information around any training gaps. Succession plans



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were completed for immediate, 1 year, and 5 year time horizons. Prioritized recommendations to address identified training gaps were included

Responsibilities included:

- Development of interview questions that were approved by 2 union groups
- Conducted 46 individual interviews and developed a summary report that ensured confidentiality
- Development of 6 succession plans (immediate, 1 year and 5 year for each of the sworn and civilian team members)
- Identification and prioritization of training gaps

Skills/Expertise Included:

- Question development and interview skills
- Succession planning and talent gap identification
- Training gap identification

Deliverables Included:

- Questions that met the approval of 2 union groups
- 6 Succession plans and identification of talent gaps
- Training gap identification and prioritization

20. Solicitor General and Public Security - Alberta Sheriffs

06 2011 – 12 2011

Court Security and Prisoner Transportation Study

(7 months)

Process Evaluator

Examined the processes and procedures used by Alberta Sheriff's Court Security and Prisoner Transportation department throughout Alberta. Included reviews of: the Peace Officers Act, all signed Mandates, Standard Operating Procedure Manual, and Letters of Understanding in place for Alberta Sheriff's court security and prisoner transport across the Province. Multiple interviews were conducted and tours were completed of all main facilities including but not limited to: Edmonton Law Courts, Calgary Court House, Base Courts, Arrest Processing Units in Edmonton and Calgary and the Edmonton Young Offenders Centre. Regional discrepancies and similarities between regions were highlighted and best practices and procedural changes to improve the efficiency and effectiveness of operations were recommended

Responsibilities included:

- Review of Alberta Sheriff's Acts, mandates, operating manuals and letters of operation
- Study of Alberta Sheriff Court Security and Prisoner Transportation operations
- Identification of any activities or operations that were outside of mandates
- Process improvement recommendations to improve efficiency and effectiveness

Skills/Expertise Included:

- Research
- Interview
- Process improvement



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Deliverables Included:

- Report summarizing current activities, variances from mandated operations and prioritized recommendations

19. Edmonton Police Service

03 2011 – 07 2011

Resourcing Requirement Study – Edmonton Remand Centre

(5 months)

Researcher, Process Reviewer, Evaluator

Determination of best practices and procedures and the total human and non-human resources required to transport detainees from the new Edmonton Remand Centre to the Edmonton Law Courts building and visa versa. The study included the examination of current practices in use in a variety of remand centres, arrest processing units, and courthouses across Canada. Information on process and procedures was collected through research, interviews, and where possible tours were completed. Best practices were determined and recommendations made as to how those practices could be implemented at the new Edmonton Remand Centre. Human and non-human resourcing requirements and associated costs were determined

Responsibilities included:

- Research and interviews on best practices across Canada
- Development of processes based on best practices
- Determination of human and non human resources required to maximize the efficiency and effectiveness of operations

Skills/Expertise Included:

- Research
- Interview
- Process evaluation and development
- Resourcing requirement analysis

Deliverables Included:

- Summary report on practices across Canada and identification of best practices
- Recommended processes that maximize the efficiency and effectiveness of operations
- Resourcing requirements (human and non-human)

18. Downtown Business Association

01 2011 – 06 2011

Downtown Proud!

11 2009 – 03 2010

Business Plan Development, Fundraiser, Evaluator

(11 months)

Downtown Proud! employs Boyle Street clients to remove litter from the streets of downtown Edmonton. This program is funded by approximately 15 businesses operating in the downtown area. In 2009 work involved approaching business to discuss the project, secure funding and to develop metrics for evaluation. Once the project was up and running and to ensure ongoing project funding, an evaluative framework was developed and the evaluation completed after consultation with each of the funding business partners



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Responsibilities included:

- Development of a list of possible business partners who could provide funding
- Interviews with each business partner to determine interest, solicit funding and develop metrics for the evaluation
- Development of the evaluation framework and completion of the year 1 evaluation
- Presentation of the results back to the business partners, secured funds for future operations and collected ideas for expansion of Downtown Proud! operations

Skills/Expertise Included:

- Interview
- Fund development
- Stakeholder development
- Evaluation
- Presentation

Deliverables Included:

- Summary of interviews with business partners
- Evaluation report and recommendations
- Presentation of results back to business partners

17. Edmonton Police Services

12 2010 – 06 2011

Neighbourhood Empowerment Team (NET)

(7 months)

Evaluator, Business Plan Development

Developed a decision matrix that enabled Edmonton Policy Services, United Way – Capital Region, City of Edmonton – Community Services and The Family Centre to identify neighbourhoods where the success of NET would be maximized. Activities included extensive facilitation to develop quantitative and qualitative metrics that met the needs of the 4 diverse partner organizations, development of the evaluative framework, evaluation completion and presentation of results to the Edmonton Police Commission and City Council. Monetization of many of the metrics required consultation with Alberta Justice to determine the costs associated with various outcomes from the court process. Also provided recommendations around the processes on how NET enters and leaves a community

Responsibilities included:

- Interviews and meeting with all NET team partners
- Development of metrics that were important to each of the partners
- Creation of an evaluation framework that included the key metrics of all partners
- Completion of the evaluation and development of the evaluation report
- Recommendation on entry and exit strategies and creation of a decision matrix
- Multiple presentations to all partners, City Council,

Skills/Expertise Included:

- Stakeholder engagement



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- Facilitation
- Evaluation framework development
- Evaluation
- Process development
- Report and briefing note development
- Presentation skills

Deliverables Included:

- Evaluation framework development
- Evaluation and report
- Decision matrix - recommendations on entry and exit strategies
- Presentations to partners, City Council and the Edmonton Police Commission

16. REACH Edmonton

06 2010 – 05 2011

Business & Implementation Plans for a 24/7 Service Delivery Model for High Needs Populations

Researcher, Facilitator, Business Plan Developer

(12 months)

Through worldwide research and extensive facilitation with a large number of service delivery partners, front line workers, high needs clients, and Edmonton Police Services a model for the delivery of services to high needs populations on a 24 hour 7 day a week basis was developed. The final report included a summary of the research completed that highlighted best practices and a business plan for delivering 24 hour a day 7 day a week services for high needs populations that was developed through consultation with front line service providers. Also included a draft budget and a summary of identified risks and risk mitigation strategies. Following the acceptance of the delivery model by City Council additional facilitation was conducted to develop the first phase of the implementation process for the model

Responsibilities included:

- Research on best practices worldwide
- Completion of a survey in partnership with Homeward Trust of homeless individuals
- Development of a draft business plan based on research and identified needs from the survey results
- Facilitation and presentation of draft plan to the non-profit community
- Adjustments to plan based on the community consultation
- Development of budget and implementation plan
- Risk matrix development
- Evaluation framework

Skills/Expertise Included:

- Research
- Stakeholder engagement
- Survey development and analysis
- Business plan development
- Facilitation and presentation skills



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- Budgeting
- Risk management and evaluation

Deliverables Included:

- Summary report on research completed
- Completion of survey and summary of results
- Draft and final business plans
- Presentation to the community of draft business plan, survey results and final business plan

15. County of Strathcona

05 2010 – 07 2011

Insurance Program Review

(15 months)

Risk Manager, Actuary

The purpose of the Strathcona Country insurance program and reciprocal review was to determine the adequacy of the current limits, deductibles, and coverages in place. In addition an examination of the claims history and historical insurance rates paid provided the Country with a summary as to the profitability of the current insurance program and included recommendations for change

Responsibilities included:

- Review of original and current reciprocal agreements and the cancellation penalties associated with each
- Analysis of Strathcona County's claims history
- Review of all existing insurance policies including an evaluation as to the suitability of the coverages currently in place, identification of any gaps or coverage redundancies, and an assessment as to the adequacy of the limits of insurance carried

Skills/Expertise Included:

- Review and research
- Insurance / risk management and actuarial
- Analysis
- Report writing

Deliverables Included:

- Summary of current insurance coverages and gap identification
- Analysis of claims history and recommendations on coverage, deductibles and limits

14. Downtown Business Association

05 2010 – 08 2010

Business Recruitment Study

(4 months)

Project Manager

The Downtown Business Association (DBA) hires an MBA student each summer to complete a project. Was responsible for developing interview questions, reviewing resumes, interviewing, hiring the student and ongoing mentorship and supervision during the 4 months. The MBA student completed a needs assessment of the downtown area wrt to business expansion to meet residents' needs. The project was very successful and was shared with the all members of the Downtown Business Association.



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Responsibilities included:

- Recruitment and training
- Mentorship on the project
- Survey development and analysis

Skills/Expertise Included:

- Recruitment
- Supervision and mentorship
- Survey development

Deliverables Included:

- Hiring of Student
- Completion of project
- Presentation to the business community

13. Alberta Avenue Business Association

05 2010 – 08 2010

Economic Impact Assessment

(4 months)

Project Manager

The Alberta Avenue Business Association hired a summer MBA student to complete a baseline economic assessment study of the business revitalization zone. As this was an international student, significant mentorship, and guidance was provided

Responsibilities included:

- Development of project outline
- Creating and distribution of business survey
- Supervision and mentorship
- Review of all reports

Skills/Expertise Included:

- Supervision and mentorship
- Survey development
- Written communications

Deliverables Included:

- Final economic impact assessment report and presentation to the committee of Business Revitalization Zones

12. Edmonton Transit & Edmonton Police Service

01 2010 – 01 2011

Youth Training Project

(13 months)

Evaluator

Developed an evaluative framework for a pilot program providing youth worker intervention for youths whose behavior had been identified as likely to escalate to criminal. A balance of quantitative and qualitative measurement tools were developed and key performance indicators and benchmarks established. The project required an understanding of EPS and Alberta Justice processes so as to be able to determine the costs associated with each possible outcome of criminal charge of a



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youth. The final report combined a Social Return on Investment year one evaluation, summary of performance against the KPIs and recommendations for program improvement. The evaluation determined the profile of those youths where the investment in preventative intervention would produce the greatest economic benefit

Responsibilities included:

- Research so as to gain understanding of the project
- Development of metrics, KPIs
- Development of tracking and monitoring tools
- Development of the evaluation framework
- Completion of the evaluation and recommendations for program improvements

Skills/Expertise Included:

- Research
- Metric and KPI development
- Evaluation
- Stakeholder engagement

Deliverables Included:

- KPI and metric development and creation of respective tracking and monitoring tools
- Evaluation framework
- Final evaluation and recommendations for program improvements

11. Alberta Council of Women's Shelters

09 2009 – 08 2010

Strategic Marketing plan for a Prevention of Domestic Violence Toolkit for the Workplace (12 months)

Evaluator, Marketing Plan Developer

Through a research and marketing focus group consultation process the impacts of domestic violence in the workplace were determined and monetized. A cost benefit analysis on the impact of domestic violence on workplace economics was completed. Non-monetizable impacts were examined and combined with the cost benefit analysis to determine the total impact of domestic violence in the workplace. The analysis formed a critical part of a strategic marketing plan for a domestic violence in the workplace prevention toolkit.

Responsibilities included:

- Cost benefit analysis on the impact of domestic violence in the workplace
- Facilitation of market focus groups with a variety of organizations representing the public and private sector. Completion of a report of findings
- Development of a marketing plan for the toolkit

Skills/Expertise Included:

- Evaluation
- Monetization of impacts
- Marketing plan development
- Facilitation and presentation



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Deliverables Included:

- Cost benefit analysis
- Summary on market research
- Marketing plan

10. Committee of Business Revitalization Zones (BRZ)

04 2009 – 08 2009

Strategic and Communication Plan Development

(5 months)

Plan Developer and Project Manager

Facilitated the development of a strategic plan for the committee which is comprises of 12 individual BRZs. Oversight for the implementation of the strategic plan and development of the communication plan

Responsibilities included:

- Facilitation and development of the strategic plan including an environmental scan, implementation plan, risk assessment and risk mitigation
- Management of summer student during development of the communication plan

Skills/Expertise Included:

- Facilitation and presentation
- Strategic plan development and implementation
- Management of summer student project

Deliverables Included:

- Strategic plan including implementation plan and risk mitigation plan
- Communication plan

9. Grant MacEwan University

09 2008 – 12 2009

Risk Management Instructor

(18 months)

Sessional Instructor

Employed as a sessional instructor while completing my MBA

Responsibilities included:

- Development and facilitation of a full semester course in risk management for 1st year BComm students

Skills/Expertise Included:

- Course development
- Risk management experience
- Presentation skills

Deliverables Included:

- Development of the course from scratch including all projects and examinations
- Taught approximately 60 students over 4 semesters



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8. Anderson Career Training Institute

02 2007 – 08 2014

Risk Management Instructor

(92 months)

Sessional Instructor

Provided risk management training and guidance to new entrepreneurs through the Anderson Career Training Institute program for students who were entrepreneurs. Each session was ½ day in length during which time students were taught how to identify, prioritize and mitigate the risks associated with their operations. Provided instruction to more than 700 students representing extremely diverse organizations

Responsibilities included:

- Development and presentation of the risk management session
- Ongoing mentorship as required

Skills/Expertise Included:

- Session development and presentation skills
- Risk Management experience. Identification and management of risks associated with a wide variety of business ventures
- Mentorship

Deliverables Included:

- Presentation to 20-25 entrepreneurs 5 times per year (100-125 annually)

7. Resource Centre for Voluntary Organization (RCVO)

09 2013 – 06 2015

Organizational Transformation

(12 months)

Executive Director

The RCVO was an arms length entity falling under the MacEwan University organizational umbrella. Contracted to determine if the RCVO should remain part of MacEwan or if it should be transformed out. Through an evaluation and consultation process it was determined that the RCVO did not fit with MacEwan University. Further exploration determined that the clients would best be served if the RCVO were to be acquired by a non-profit with the capacity to manage its operations. In 2015 Volunteer Alberta acquired the RCVO and all of its resources.

Responsibilities included:

- Day to day management of staff and operations
- Exploration of funding alternatives
- Determination if the RCVO fit within the MacEwan “family” and determination of possible alternatives for its operation
- Transition plan

Skills/Expertise Included:

- Feasibility study
- Fund development
- Partner development



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- Change management

Deliverables Included:

- Maintained staff and client moral during the evaluation
- Located a partner organization who ultimately acquired RVCO operations
- Development of the acquisition and transformation plan
- No interruption to client services

6. AVIVA Canada

01 2005 – 08 2007

Assistant Vice President

(32 months)

Hired to transition and manage an underperforming branch experiencing serious staff and client retention issues. Hired to transition the branch, return it to a profitable position and to grow revenue. Through a consultative approach with staff, clients and competitors required changes were determined, prioritized, implemented and monitored. Significant improvements in staff moral and client relationships were keys to the successful turnaround of the branch

Responsibilities included:

- Accountability for all aspects of branch performance including profitability, growth, client and staff retention, customer and client satisfaction, budget / performance to plan, disaster recovery plan, and expense management
- Management of a \$3,000,000 premises renovation. Renovation was completed on time and within budget with no interruption in communications, service or product delivery
- Management of 100 staff members

Skills/Expertise Included:

- Setting and communicating strategic goals and alignment of staff and resources to meet goals
- Talent management
- Change management
- Strategic and operational planning
- Staff and client relationship development

Deliverables Included:

- Increase in branch revenue growth from -5% - +19%; 2006 results: \$110,00,000 in revenue, generating profits in excess of \$23,000,000
- Decrease in staff turnover from 18% to 8% in the first year
- 18% improvement in customer satisfaction survey results in the first year
- Developed and implemented a talent management and succession plan that was subsequently adopted Canada wide



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5. Allianz

10 2003 – 01 2005

Assistant Vice President

(16 months)

In 2003 the Edmonton Allianz branch was significantly underperforming and unprofitable. I was hired to transition the branch, return it to a profitable position and grow revenue. Through a consultative approach with staff, clients and competitors required changes were determined and prioritized. Significant improvements in staff moral and client relationships were keys to the successful turnaround of the branch

Responsibilities included:

- Rehabilitation and management of a branch in excess of \$100,000,000 in revenue
- Accountability for all aspects of performance including strategic planning and budgeting
- Management of a team of 110 staff and 95 broker client relationships
- Management during the merger with Intact Insurance – member of the merger transition team

Skills/Expertise Included:

- Staff and client relationship development
- Change management
- Business development, administration and marketing

Deliverables Included:

- Stopping revenue run-off and realizing profitable growth within 8 months
- Expansion of the client base in order to diversify risk and reduce profit variability
- Recognized as Allianz's most profitable and fastest growing Canadian branch within one year
- Maintaining staff turnover below plan during the merger with Intact Insurance

4. Intact Insurance

05 2001 – 10 2003

Branch Manager

(30 months)

Intact (formerly ING) is Canada's largest insurance company. As manager for one of the Edmonton branches I was responsible for budgets, performance to plan, profitability and all aspects of staff and client management. Managed the Edmonton portion of ING acquisition of the Zurich Canada commercial portfolio in 2002.

Responsibilities included:

- Management of a branch in excess of \$87,000,000 in revenue
- Management of 57 staff and 70 client relationships

Skills/Expertise Included:

- Strategic plan implementation, communication and goal setting
- Alignment of staff to ensure that goals were achieved

Deliverables Included:

- Branch profit in excess of plan every year
- Managed the acquisition of the acquisition of Zurich Canada portfolio



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3. Government of Alberta – Alberta Treasury

08 2000 – 04 2001

Senior Risk Analyst

(9 months)

Responsible for assessing and responding to the risk management needs of the various Alberta Government ministries. Conducted risk assessments and determined what risks could remain within the Government program and which risks needed to be placed with third party insurers.

Responsibilities included:

- Conducting risk assessments and making appropriate recommendations
- Development of cross ministry and industry teams to ensure large risk exposures were managed
- Negotiation and placing of third party insurance
- Conducted risk management training
- Evaluation of contracts that the ministries entered into with third parties to ensure that the Alberta Government was protected and fairly represented

2. Chubb Insurance

09 1996 – 07 2000

Senior Underwriter

(47 months)

Senior underwriter in the Energy Resources Group with responsibility for large commercial risks and broker relationships across Alberta and the NWT

Responsibilities included:

- Underwriting of large commercial risks in the Energy, Mining and Electricity sectors
- Development of broker relationships

Skills/Expertise Included:

- Local and International insurance placement expertise
- Property, casualty, marine cargo, ocean marine cargo, workers' compensation, political risk, wrap up liability, and course of construction underwriter. Western Canada's boiler and machinery underwriting expert

1. Core Laboratories

04 1988 – 08 1993

Coordinator, Chemist

(65 months)

Hired as a chemist in the Oil and Gas laboratory. Promoted to coordinator within the 1st year.

Responsibilities included:

- Chemical Analysis
- Supervision of staff
- Coordination of field operation
- Completion of client reports



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EDUCATION/TRAINING

<u>Risk and Insurance Management Society</u> How to Conduct High Quality Risk Assessments	2013
<u>Risk and Insurance Management Society</u> Creating Value: Risk Manager as Innovator	2013
<u>University of Alberta</u> Masters in Business Administration – Natural Resources Energy and the Environment Specialization	2009
<u>Risk and Insurance Management Society</u> Risk Analysis Tools for Effective Risk Management	2005
<u>Canadian Securities Institute</u> Canadian Securities Course	2003
<u>Risk and Insurance Management Society</u> RIMS Fellowship	2000
<u>University of Calgary</u> Bachelor of Commerce – With Distinction – Insurance and Risk Management Bachelor of Science – With Distinction – Actuarial Science	1996
<u>Southern Alberta Institute of Technology</u> Chemical Technology Diploma	1983

ACADEMIC AWARDS

Queen Elizabeth II Scholarship – Masters Level
Paul Wacko MBA Award
Beta Gamma Sigma certificate of Scholastic Achievement
Institute of Risk Management RIMS Scholarship – 1st Canadian Recipient
The Ancon Scholarship