

Jesse Reeves, President

Mr. Reeves, who works with Barnes & Thornburg LLP as the Director of Lateral Recruiting is the Board President of Montessori Works. Mr. Reeves will be instrumental in building community relationships in Sussex County and state wide to support the school.

Linda Zankowsky, Ed.D., Vice President

Dr. Zankowsky, former Head of Wilmington Montessori School, and past Delaware school principal, is the associate director of the Delaware Center for Teacher Education at the University of Delaware. Dr. Zankowsky has the following Delaware certifications: Certified Central Office Personnel, Elementary Teacher, Teacher of Middle School English/Language Arts, Principal/Assistant Principal, Reading Specialist, Superintendent or Assistant Superintendent. Dr. Zankowsky will provide guidance in hiring Montessori teachers and leadership for the school and in curriculum and instructional practices.

E. McCrae Harrison, Secretary

Ms. Harrison, former director and teacher at the Elementary Workshop Montessori School, now oversees the Montessori Academy at Christina, Delaware's first public Montessori program. Certified Teacher of Elementary, Principal/Assistant Principal, Teacher of Middle Level English and Social Studies. Ms. Harrison will provide leadership related to the implementation of the Montessori approach and curriculum in a public school.

Mark Conces, Treasurer

Mr. Conces a senior vice president at Citizens Bank, has extensive finance, marketing, and management experience across a diverse set of industries. He is a Montessori parent and former treasurer of the board of Wilmington Montessori School.

Consultant to Montessori Works

J. Brett Taylor, Ed.D.

J. Brett Taylor, Ed.D. is the Principal Owner of INFORM Consulting LLC, a firm specializing in public policy research, education advisement, and financial consulting. Dr. Taylor has over 20 years of experience in administration, finance and public policy crossing multiple disciplines, including, education, transportation, energy and environmental sustainability. Dr. Taylor is the former Executive Director and founder of the Delaware STEM Academy, a proposed STEM-based charter high school in Wilmington, DE. Previously, Dr. Taylor was Chief Financial Officer for the Red Clay Consolidated School District, overseeing its budgetary and accounting activities and capital improvement program. Dr. Taylor consulted with Montessori Works, Inc. to prepare and submit an application for a grade K-6 charter school in Sussex County.

Jesse Reeves

- Self-motivated executive with more than 25 years of experience in recruiting, sales and management staffing
- Developed local, regional, and national relationships with many of the 200 largest law firms in the United States
- Experience in leading diversity and inclusion efforts for Yoh, a Day & Zimmermann Company. Also provided training to the Executive Committee on building a more diverse employee base.

Experience:

Barnes & Thornburg LLP(www.btlaw.com)

1000 West Street, Suite 1500, Wilmington, DE 19801

Director of Lateral Recruiting, Oversees the recruiting of lateral partners. Mr. Reeves provides leadership and vision in the development and implementation of recruiting priorities and strategies.

IMPACT Search (www.impactsearch.com)

2003-October 2016

aka Sales Solutions and IMPACT Search, LLC
3029 Bowlerama Drive, New Castle, DE 19720

Principal, currently working with many of the AmLaw 100 and 200 law firms on a regional and national basis to achieve lateral and diversity hiring objectives.

Additional responsibilities include business development, recruiting, personnel management, as well as the financial management of the organization. Through acquisition, IMPACT has become a bicoastal operation providing executive search services in law, food manufacturing, and financial services.

Sales Solutions, LLC

1999-2003

(predecessor to IMPACT Search)

Main responsibilities included the overall management of staffing; business development and recruiting support. Created a national platform for the organization in biotechnology, clinical research and pharmaceuticals.

Yoh (a Day & Zimmerman Company) (www.yoh.com)

1988-1999

1500 Spring Garden Street, Philadelphia, PA 19130

Vice President, specializing in the placement of scientific personnel on a temporary and direct basis, Philadelphia, PA, 1998 to 1999. Same duties as Technical Director (below). Added offices in Sacramento, CA and Baltimore, MD. Increased the

number of Vendor-on-Premise programs with locations in California, Connecticut, Delaware, Georgia and Illinois. Increased the market research program to four staff people, including one manager. Added a communications manager to design direct mail and create greater market penetration.

Technical Director, Yoh Scientific, Philadelphia, PA, 1994 to 1997. Directed marketing, sales and training of all programs and personnel relating to the growth and maintenance of the business. Locations included Los Angeles, Orange, Sacramento, San Diego, Santa Clara and Walnut Creek, CA; Norwalk, CT; Atlanta, GA; Oak Brook, IL; Waltham, MA; Florham Park and Princeton, NJ; Raleigh, NC; Wayne, PA.; and Houston, TX. Managed vender-on-premise programs in Connecticut and Pennsylvania.

Manager, Yoh Scientific, Newark, DE, 1992 to 1994. Responsible for the growth of accounts in Maryland, New Jersey and Pennsylvania. Increased revenues more than 200%. Designed a Yoh Scientific sales and training program. Traveled nationwide, training personnel on how to sell and recruit scientific services. Created a market research program which could be used to train and track client data for marketing and sales purposes.

Recruiter, Yoh Company and Yoh Scientific, Newark, DE, 1988 to 1992. Interviewed and submitted candidates for job openings for scientists, engineers, programmers, designers and production personnel. Managed accounts for three staff sales managers.

Highlights:

IMPACT Search

- Working relationships with the Delaware-based office managing partners and other personnel in a large majority of all AmLaw 100 and other major firms
- Developed Delaware-based offices from startup and near startup stages for Barnes & Thornburg, Offit Kurman, Polsinelli, Cole Schotz, and Whiteford Taylor & Preston, and McElree Harvey.
- Established an IP practice for Offit Kurman in Philadelphia.
- Helped Ballard Spahr establish a Public Finance Practice in Delaware
- Helped Barnes & Thornburg bolster its real estate practice by hiring group for their Columbus office.
- Bolstered the real estate practice for Morris James LLP by recruiting and hiring a practice group for them.
- Established a Chancery practice for Polsinelli in Delaware.
- Helped establish the Philadelphia office for Thorp Reed & Armstrong (now known as Clark Hill).
- Help create the Family law practice in Delaware for McElree Harvey
- Bolstered the litigation practice in Los Angeles for Sedgwick.
- Bolstered the litigation practice in Orange, CA for Gordon & Rees
- Established Commercial Litigation and Shareholder Derivatives Practice for Eckert Seaman in Wilmington.

Yoh

- Led growth of Yoh Scientific from \$4 million to \$50 million in sales and \$450,000 to \$3.4 million in net income.
- Implementation of the first Vender-on-Premise program for Yoh
- Developed two major accounts within a four-year period:
 - Merck & Co. – \$200,000 to an estimated \$20 million
 - Johnson & Johnson – \$250,000 to an estimated \$1.5 million.
- Designed sales and recruiting training programs for Yoh Scientific.
- Introduced and staffed a market research function in Yoh Company.
- Obtained and managed Merck On Site Program –awarded \$20 million contract.
- Managed and obtained \$15 million Boehringer Ingelheim Pharmaceuticals contract.
- Co-managed on-site program for Astra Zeneca – awarded \$20 million contract.
- Project Manager of Dade Behring on-site program – awarded \$16 million contract.

Education:

Virginia Polytechnic Institute/State University, Blacksburg, VA.
B.A. (Political Science) - June 1987

Memberships:

- Board President of Montessori Works (formerly Elementary Workshop Montessori School), which develops public Montessori programs for economically disadvantaged students at or below achievement level, 2013 to present.
- Board Member of SmartDrive, which focuses on prevention of teen driving accidents, 2013 to present. Board President July to present.
- Member of Day & Zimmermann Diversity Committee, 1998-April 1999.
- Steering Committee Member for ISO-9002. Certified ISO 9002 Internal Auditor.
- Chairperson of Diversity Committee, H.L. Yoh Company LLC, June 1995 to April 1999.
- Member of H.L. Yoh Company LLC Executive Committee, 1995-April 1999.
- Life-loyal member of Sigma Chi Fraternity.
- Alumni of LEAD (Leadership and Educational Development, a Who's Who of future minority leaders in business), Columbia University, 1982.
- Member of the Chinese American Community Center.
- Member of the Wilmington West Rotary Club.

Linda S. Zankowsky, Ed.D.

200 Academy Street, Room 103
Delaware Center for Teacher Education
University of Delaware
Newark, Delaware 19716

302-831-1630 (office)
610-558-9692 (home)
lzankow@udel.edu

EDUCATION

- Ed.D. Educational Leadership, Concentration: Curriculum and Instruction, Literacy, *2007*
University of Delaware, Newark, Delaware
- M.Ed. Education, Concentration: Reading and Language Arts, *1982*
University of Delaware, Newark, Delaware
- B.S. Educational Research, Concentration: Psychology, *1981*
Bucknell University, Lewisburg, PA

PROFESSIONAL CERTIFICATIONS

State of Delaware Department of Education

Superintendent or Assistant Superintendent, *2015*
Certified Central Office Personnel, *2015*
Teacher of Middle Level Social Studies, Grades 6-8, *2011*
Teacher of Middle Level English Language Arts, Grades 6-8, *2011*
Teacher of Elementary, Grades K-6, *2011*
Principal/Assistant Principal, *2000, 1995, 1990*
Reading Specialist, *1984*

American Montessori Society

Montessori School Management, Center for Montessori Teacher Education, *2008*

HONORS

- University of Delaware: Richard L. Venezky Award for Creativity in Research, *Spring 2007*
Awarded to a University of Delaware doctoral student in the School of Education who has done creative work in the area of literacy research.
- State of Delaware: House of Representatives Tribute, *Summer 2000*
Award honoring 18 years of service leading innovation in public schools.

PROFESSIONAL EXPERIENCE: HIGHER EDUCATION

Associate Director, Delaware Center for Teacher Education, Office of Clinical Studies

University of Delaware, Newark, Delaware, 2012 - present

- Responsible for the placement of University of Delaware teacher candidates in field placements throughout their course of studies in the Early Childhood Education (ECE) and Elementary Teacher Education (ETE) programs.
- Interface with school districts creating a positive liaison between the University and districts to ensure quality placements preparing teacher candidates for their future teaching roles.
- Responsible for professional development (face to face and online) for clinical educators and teacher candidates including coteaching, mentoring, and using the University of Delaware Capstone Clinical Evaluation Rubric.
- Lead and participate in committees working across teacher preparation programs to develop commonly held agreements regarding policies and procedures related to clinical experiences.
- Guest presenter for Early Childhood and Elementary Teacher Education programs on Responsive Classroom.
- Managed State of Delaware Department of Education Teacher Preparation Grant allowing teacher preparation programs to advance coteaching as a model for student teaching. Facilitated a coteaching workgroup in the development of coteaching support materials and workshops. Led professional development for ECE and ETE clinical educators and teacher candidates to prepare them for coteaching during student teaching.
- Managed a Title II grant project to develop the Delaware Responsive Classroom Teaching Network, which is currently part of the Professional Development Center for Educators portfolio.
- Provided professional development activities in Delaware schools and districts in Responsive Classroom practices and coteaching as a classroom practice.

Adjunct Instructor

University of Delaware, Newark, Delaware, Spring 2011, 1987-1990

- EDUC 609: Literacy Assessment and Instruction II, Spring 2011
- EDDV 622: Teaching Reading in the Content Areas, Spring 1990
- EDDV 620: Foundations of Reading Instruction, Fall 1990
- EDDV 621: Introduction to Diagnosis and Correction of Reading Disabilities, Summer 1989, 1987
- EDDV 610: Foundations of Reading Instruction, Summer 1988

PROFESSIONAL EXPERIENCE: SCHOOL LEADERSHIP

Head of School

Wilmington Montessori School, Wilmington, Delaware, 2000-2012

- Led staff of approximately 100 teachers, assistant teachers and administrative staff to serve 385+ children ages 6 months to 12 years. The school is an innovative model of

Montessori Education combining the Montessori Philosophy with current research on teaching and learning. Particular focus is given to the social/emotional curriculum and the research on brain development as related to Montessori approaches to teaching and learning.

- Developed the concept of the Center for Montessori Advancement at Wilmington Montessori School as a center for professional development leadership in Delaware. The center provided and continues to provide professional development for early childhood professionals in Delaware.
- Managed \$4M budget while also providing guidance for successful fundraising that secured over \$1,000,000.
- Collaboratively led the development and implementation of a common vision, mission, and strategic plan. Created program cohesion and continuity as well as staff loyalty critical to the school's evolution as a state and national model of innovation and creativity.
- Led curriculum development combining Boyer's model for elementary schools with the Montessori philosophy and curriculum.
- Earned NAEYC and AMS accreditation as well as a 5-STAR level rating for early childhood, enabling the school to increase the number of Purchase of Care children served.
- Ensured professional development and parent collaboration to facilitate instruction that included current brain-based understandings of literacy, mathematics, and inquiry-based learning, as well as a focus on social/emotional curriculum in balance with academic curriculum.
- Worked with the non-profit board to strategically lead the school as enrollment grew and dealt with enrollment issues as a result of the economic pressures of 2008-2012.

Principal

Brandywine School District, Mount Pleasant Elementary School
Wilmington, Delaware, 1997-2000

- Led the elementary school of 430 students in grades K-3, including an intensive learning center and self-contained gifted and talented program for the district.
- Created and implemented innovative PM Academy still in place today that provides at-home reading strategies for parents, overcoming traditional obstacles to create an environment of strong parent participation where it was previously lacking.
- Assisted the staff in developing a vision and five-year plan focused on the needs of the children served in the school.
- Furthered consistency, coherence, and continuity by introducing the Family Model concept, keeping peer groups intact and including mainstreamed special needs and gifted students.
- Improved school climate and culture by working with staff to implement the Responsive Classroom principles school wide, an approach still being implemented in the school.
- Obtained a grant for technology and an instructional management system.

- Developed instructional practices with the teachers which are based on sound information about how children learn and assist children in reaching the state standards.

Principal

Appoquinimink School District, Townsend Elementary School
Odessa, Delaware, 1991-1997

- Led the elementary school of 580 students in grades K-5. Developed a multi-age program with team-teaching, including 1/2/3, 1/2, and 4/5 combinations.
- Developed a site-based management model for this K-5 Relearning School based on the principles of Theodore Sizer and the Coalition of Essential Schools, enabling teachers to collaboratively participate in budget, school structure, and unit count decision making.
- Developed with the staff a curriculum based on developmentally appropriate instruction and integrated thematic instruction based on Boyer's model for Elementary Schools.
- Developed a language arts portfolio assessment system. Gained teacher and parent buy-in for this approach to education.
- The school earned the designation of an NSF Project 21 State of DE Initiative Demonstration site and model school for best practices in teaching, learning, and teacher professional development. The school participated in the National Blue Ribbon Award Competition.

PROFESSIONAL EXPERIENCE: TEACHING

Elementary School Teacher

Red Clay School District, Warner Elementary School, 1988-1991

- Third Grade teacher. Collaborated in coteaching team with colleagues to develop a highly successful collaborative learning third grade classroom with team of three teachers and 60+ students.
- Fifth Grade teacher for mathematics, social studies and reading.

Capital School District, Hartley Elementary School, 1987-1988

- Fourth Grade teacher.

Middle School Teacher

Capital school District, William Henry Middle School, 1982-1987

- Fifth Grade teacher - Math, Science and Reading -Departmentalized two teacher team teaching.
- Chapter I Reading Specialist fifth through sixth grades. Served as resource teacher for classroom teachers, did diagnostic testing and instruction of students.

PUBLICATIONS

Zankowsky, L. (2006). *School-wide reading assessment in a Montessori program*. (Unpublished Doctoral Position Paper, University of Delaware, Newark, DE)

Zankowsky, L. & Hanway, S. (2009). A New Model for Service Projects: Bringing Power Up Gambia to Wilmington Montessori. *Montessori Life*, 29(3) 26-30.

CONFERENCE AND INVITED PRESENTATIONS

- Zankowsky, L. (2016). Using Responsive Classroom: Linking clinical educators, schools, and teacher candidates. National Student teaching and Supervision Conference. West Chester, Pennsylvania.
- Zankowsky, L. (2015). Building a positive classroom and school climate: Responsive Classroom approaches. 13th Annual Policy and Practice Institute: Delaware's Conference on Public Education. Dover, Delaware.
- Zankowsky, L. (2014). Comprehensive writing instruction in a Montessori classroom. Maine Montessori Association Fall Conference. Portland, Maine.
- Zankowsky, L. (2014). Comprehensive writing instruction in a Montessori classroom. American Montessori Society National Conference. Dallas, Texas.
- Zankowsky, L. (2013). Follow the child to reading success. American Montessori Society National Conference. Orlando, Florida.
- Zankowsky, L. (2011). Improving reading assessment with classroom based assessment tools. American Montessori Society National Conference. Chicago, Illinois.
- Zankowsky, L. (2009). Improving reading assessment with classroom based assessment tools. American Montessori Society National Conference. New Orleans, Louisiana.
- Zankowsky, L., Wason, A., Lalama, L., Madden, L. (2008). Following the child to reading independence: The weaving of classroom based assessment and instruction in the Montessori classroom. American Montessori Society National Conference. Washington, DC.
- Zankowsky, L. (2004). Following the child to reading independence. American Montessori Society National Conference. Washington, DC.
- Zankowsky, L. & Wason, A. (2003). Following the child: matching text to children's needs. Boston, Massachusetts.
- Zankowsky, L. (1995). Multi-age classrooms. Association for Childhood Education International Conference. Washington, DC.
- Zankowsky, L. (1994). Thematic instruction in the classroom. Delaware Early Childhood Conference. Dover, Delaware.
- Zankowsky, L. (1994) Thematic instruction in the classroom. Diamond State Reading Association Conference. Lewes, Delaware.
- Zankowsky, L. (1993). Multi-age classrooms. Delaware Early Childhood Conference. Dover, Delaware.
- Zankowsky, L. (1992). Progress reports for elementary children. Delaware Early Childhood Conference. Dover, Delaware.

Zankowsky, L. (1992). Portfolios in the classroom. Diamond State Reading Association Conference. Lewes, Delaware.

Zankowsky, L. (1990). Creating a sense of play with children's literature. Delaware Early Childhood Conference. Dover, Delaware.

Zankowsky, L. (1988). Question, answer, response methods. Diamond State Reading Association Conference. Lewes, Delaware.

Zankowsky, L. (1989). Reading in the content areas. Governor's Conference for Educators. Dover, Delaware

Zankowsky, L. (1986). Using children's literature. Diamond State Reading Association Conference. Lewes, Delaware.

Zankowsky, L. (1984). Reading in the content areas. Diamond State Reading Association Conference. Lewes, Delaware.

PROFESSIONAL DEVELOPMENT AND CONSULTING

Professional Development Center for Educators, University of Delaware - Summer 2015.

- Co-presented with Vicki Goettel, two-day workshop, *Applying Co-teaching to School Settings*.
 - Aspira Academy

Professional Development Center for Educators, University of Delaware - Responsive Classroom Workshop Presenter, 2014-2015.

- Presented responsive classroom workshops on *Morning Meeting*, *First Six Weeks of School*, *Teaching Discipline in Classrooms*, and *Teacher Language*. Presentations were made in the following schools:
 - Warner Elementary School
 - Shortlidge Elementary School
 - North Star Elementary School
 - Mount Pleasant Elementary School
 - Pleasantville Elementary School
 - New Castle Elementary School: Workshops on "*Teacher Language*".

Professional Development Center for Educators co-presenter, Summer 2014.

- Co-presented with Laurie Palmer. Week long workshop on Responsive Classroom *Teaching Discipline in Classrooms*.

American Montessori Society Webinar Presenter, Summer 2014. Starting the School Year for Reading Success.

School Consultant and Workshop Presenter, 2011-2012. Montessori Corner Schools, Plainsboro, NJ.

- Consulted on the development of a literacy curriculum for Montessori preschool programs.

- Provided professional development on current practices in reading aloud, phonemic awareness, and other early reading instructional strategies within the Montessori classroom.

School Consultant and Workshop Presenter, 2010-2012. Discovery Montessori School, Jacksonville, Florida.

- Consulted on the development of a literacy curriculum for a Montessori PreK- 6th grade program.
- Provided professional development on current practices in reading, writing, and literacy assessment within the Montessori classroom.
- Provided parent workshops on literacy development and their role in supporting their children.

School Consultant and Workshop Presenter, Spring 2011. Geiger Montessori School, Tacoma Public Schools, Tacoma, Washington.

- Consulted on the development of a literacy curriculum for Montessori PreK- 6th grade program.
- Provided professional development on current practices in reading, writing, and literacy assessment within the Montessori classroom.

Workshop Co-Leader, Summer 2011, Summer 2010. Center for Montessori Advancement, Wilmington Montessori School, Wilmington, Delaware

- Led a week-long workshop on implementing best practices in writing in Montessori classrooms.
- Led a second week-long workshop on implementing best practices in reading assessment and instruction in Montessori classrooms.

Workshop Leader

Delaware Department of Public Instruction, Dover, Delaware, 1998-1994

- Provided annual professional development on using children's literature in the classroom and "Sharing Circles: Curriculum Work in the Classroom".

Workshop Leader

Red Clay School District, Fall 1989

- Provided workshops entitled, "School Improvement: Cooperative Learning", "Children's Literature in the Classroom", and "Cooperative Learning".

Inservice Course Instructor

Delaware Teacher Center, 1988-1990

- Provided workshops on various topics related to using children's literature in the classroom.

PROFESSIONAL SERVICE

National:

- American Association of Colleges for Teacher Education (AACTE) Topical Action Group on Collaborative Clinical Preparation, *Fall 2014-present*
- American Montessori Society Research Committee, *2002-2011*
- American Montessori Society Task Force on Professional Development, *2010*
- International Reading Association State Coordinator for Delaware, *1989-1992*
- International Reading Association Literature in the Classroom Committee, *1988-1991*

University:

- Chair, Professional Development Committee, *Fall 2014-present*
- Chair, Survey Task Force, *Fall 2015-present*
- Chair, Safety Task Force, *Fall 2015-Spring 2016*.
- Coteaching Workgroup Facilitator, *Spring 2013-Fall 2015*
- University Council on Teacher Education, *Spring 2016, Spring 2013-Spring 2015, Spring 2016*
- Capstone Clinical Assessment Committee, *Spring 2014-Summer 2014*

Local:

- Delaware Office of Early Learning *Early Childhood Standards Committee, Birth to 2nd grade, 2012-2013*
- Delaware Early Childhood Council *Approach to School Readiness Committee, 2013-2015*
- State of Delaware *Kindergarten Assessment Review Committee, Summer 2012*
- Delaware Early Childhood Council *Professional Development Committee, 2009-2011*
- Association of Delaware Valley Independent Schools Board, *2007-2011*
- President, Montessori Teacher's Association of Delaware, *2003-2012*
- State of Delaware, *Governor's Task Force on Early Childhood Education, 2002-2004*
- State of Delaware, *Delaware Stars Design Committee, 2002-2006*
- Delaware Association of Independent Schools, *2000-2012*
- State of Delaware, *Comprehensive Assessment Design Committee Member, 1995-1997*
- State of Delaware, *Curriculum Cadre Member, 1994-1996*
- State of Delaware, *Language Arts Commission, (developed State Standards for Language Arts), 1992-1995*
- State of Delaware, *Performance Assessment in Literacy and Mathematics Committee, 1991-1995*
- State of Delaware, *Quality Standards for Schools and Teachers Committee, 1991-1995*
- Delaware Department of Public Instruction, *School Review Committee, May 1990*
- Kent Council of Reading, Chairperson of Young Author's Conference, *1986-1987*
- Kent Council of Reading, President, *1986-1987*, Vice President, *1985-1986*

- Kent Council of Reading Chairperson Literary Circles Committee, *1984-1985*

COMMUNITY SERVICE

- Montessori Works, founding board member, Vice Chair, *2013-present*
- First State Montessori Academy Advisory Board, *2011-present*
- Wilmington Rotary Club, *2009-present*. Scholarship Committee Vice Chair, Chair, *2011-2013*
- Jefferson Street Child Care Center Board, *1989-1992*

PROFESSIONAL ORGANIZATIONS

American Montessori Society, *2000-present*

Montessori Teacher's Association of Delaware, *2003-present*

Mark W. Conces

700 Westcliff Road
Wilmington, DE 19803
www.linkedin.com/in/markconces

Home: 302-477-1516
Mobile: 302-494-2375
markconces@gmail.com

Executive with extensive marketing, management, analytics, and profitability improvement experience across a diverse set of industries. Proven ability to create a strategic vision, identify insights, improve engagement, drive innovation, and generate profitable growth. Duke MBA and Notre Dame BA.

Strengths:

- Marketing – Acquisition, Loyalty & CRM
- Strategic Planning and Implementation
- P&L Management
- Market Analytics and Research
- Growth and Profitability Improvement
- Product Development
- Process Improvement
- Team Development & Leadership

Professional Experience

Citizens Financial Group, Dedham, Massachusetts & Wilmington, Delaware **2012 - Present**
\$133 billion commercial bank holding company.

Senior Vice President – Business Intelligence & Reporting (Jan. 2016 – Present)

- Consolidated multiple analysis and reporting groups into newly formed department.
- Managing team to streamline efforts, provide more impactful analysis and ensure consistency of information.
- Provide business analysis and reporting to all businesses within the Consumer Bank.

Senior Vice President – Marketing Analytics & Delivery (Sep. 2014 – Dec. 2015)

- Managed campaign execution team, providing better overall integration of marketing efforts and improved efficiencies.
- Managed department providing marketing analysis and strategic direction within the Consumer Bank for acquisition, retention and engagement marketing programs.
- Evaluated marketing campaigns to determine overall effectiveness of the marketing effort and to shape subsequent campaigns.

Tri-State Steel Corporation, Schererville, Indiana **2011 - 2012**
Regional steel distributor.

Acting President & Shareholder (Jun. 2011 – Sep. 2012)

- Managed family business with several million dollars in annual sales.
- Led the company to record sales in 2011. Growth fueled by adding sales representatives and expanding the product set from steel rounds to also include steel coils and billets.
- Successfully navigated company through significant sales declines during the recession. Stabilized business and brought in a permanent general manager.

Research In Motion Corporation, Wilmington, Delaware **2010 – 2011**
Manufacturer of BlackBerry Smartphones.

Senior Advisor – Higher Education Partner Programs (May 2010 – May 2011)

- Recruited to develop and implement a marketing strategy for targeting BlackBerry Smartphones to college students.
- Identified product awareness gaps through market research efforts. Developed creative messaging that addressed student needs and clearly conveyed the benefits of new BlackBerry Smartphones in the market.
- Developed an innovative, multi-million dollar marketing program focused on account activations and product upgrades to target college students in a key set of major metropolitan areas across numerous touch points.
- Rationalized approach within RIM by eliminating low-value marketing programs being conducted across multiple departments and instituting a centralized and integrated marketing team focused on education.

JPMorgan Chase Inc. – Chase Card Services, Wilmington, Delaware **1999 – 2010**
One of the largest credit card issuers in the United States.

Senior Vice President – Partner Business Unit, Cobrand Segment (Feb. 2009 – Apr. 2010)

- Managed full P&L for the Cobrand business with eight partners and \$700 million in outstanding balances.
- Developed a highly successful, multi-channel marketing campaign for Amtrak based on customer insights around how Amtrak Guest Rewards members earned and redeemed rail points.
- Identified key unmet Amtrak customer needs and modified card value proposition to better meet those needs.
- Created a customer segmentation model for Amtrak, providing better targeting and universe expansion opportunities. Amtrak marketing initiatives generated 45% account growth and 35% sales growth on the portfolio.
- Moved Amtrak and La Quinta Hotel marketing behind the log-in to serve unique offers at the customer level.

Senior Vice President – Partner Business Unit, AARP Segment (Dec. 2006 – Jan. 2009)

- Managed full P&L for AARP, one of Chase's largest credit card portfolios, with \$250 million in revenue.
- Developed a segmentation model to gain deeper customer understanding of the AARP members. Insights drove new direct mail creative, enhanced acquisition targeting, and more relevant existing customer loyalty offers.
- Successfully negotiated a long-term renewal agreement with AARP, which provided more equitable business terms and eliminated a set of significant financial challenges to the program.
- Convinced AARP to open additional distribution channels for new accounts and to allow the marketing of additional Chase financial products to its members, further improving the overall profitability of the program.

Senior Vice President – Partner Business Unit, University Segment (Jun. 2004 – Nov. 2006)

- Managed business segment of over 30 premier university credit card programs with full P&L responsibility, driving the annual growth in a mature, declining business up by over 10% in sales and credit card balances.
- Turned business around with a complete focus on marketing efforts. Key initiatives included restructuring event marketing, revamping direct mail creative, leveraging partner channels, conducting more targeted direct mail campaigns, increasing online marketing, and extending the card program reach through strategic partnerships.
- Successfully renewed 90% percent of university contracts with stronger partner marketing commitments and a 50% reduction in revenue sharing compensation to the university.

First Vice President – Partner Business Unit, Borders Group (Nov. 2003 – May 2004)

- Launched a new and unique channel for credit card marketing by putting an offer on the Borders sales receipt. This innovative approach, which was not being done elsewhere in the retail industry, resulted in a 155% increase in new accounts.
- Convinced partner to merge the Waldenbooks rewards program into the Borders rewards program to drive better product messaging and to eliminate customer confusion. Resulted in higher customer sales in the new program.

First Vice President – Partner Business Unit, Strategic Planning (Oct. 2001 – Oct. 2003)

- Managed a team that provided business units with financial planning and the development of marketing offers. Team was responsible for maximizing marketing opportunities across channels, testing new offers, analyzing results from prior campaigns, and making necessary improvements to future campaigns.
- Improved targeting of direct mail marketing offers by using transactional data from existing card member base. Efforts allowed the bank to identify zip codes where individuals showed a preference for a particular partner, such as United Airlines, Borders, or British Petroleum.

Vice President – Finance, Profitability Analysis (Jun. 1999 – Sep. 2001)

- Managed Finance team that provided financial analysis and reporting to the credit card business units.
- Instituted the use of Total Quality principles to ensure processes were sustainable and repeatable. Able to eliminate all recurring errors and reduce cycle time by 50% in the monthly financial reporting process.
- Led project to implement new system for financial analytics using Hyperion Essbase. Multi-dimensional database allowed team to analyze behavior and profitability at the customer level. Used data to shape marketing programs and modify customer pricing.

Honeywell International Inc. / AlliedSignal Corporation

1993 – 1999

Diversified manufacturing company specializing in aerospace, chemicals, controls and automotive products.

Business Controller, Chemical Specialties Division, Morristown, New Jersey

- Managed forecasting, strategic planning and analysis for five North American plants (>\$200MM in sales).
- Led financial integration effort at acquired pharmaceutical business and worked closely with plant management on post-acquisition issues. Recovered over \$8MM for company by discovering missing inventory and assets.
- Streamlined process for importing and distributing AlliedSignal products manufactured abroad. Improved efficiency and reduced staff by moving transactional processing to internal business services group.

Controller, Delaware and Virginia Specialty Chemical Plants, Claymont, Delaware

- Managed the finance departments for two plants. Areas of responsibility included accounting, forecasting, financial analysis, purchasing, inventory management, and administration.
- Reorganized Delaware plant finance team and four other staff departments to better distribute responsibilities and work more efficiently with 15% fewer staff.
- Improved financial management of plant by developing and implementing models for financial forecasting, capital justification, inventory, and budget preparation. Reduced monthly close process by two days.

Acting Controller/Assistant Controller, Sumter Automotive Plant, Sumter, South Carolina

- Managed seven-member finance team for AlliedSignal's largest automotive products plant.
- Led business process improvement initiative for eleven manufacturing sites to implement a new consolidated financial forecasting tool. Project improved forecast accuracy and reduced cycle time.

Senior Financial Analyst, Automotive Braking Systems, South Bend, Indiana

- Led due diligence for acquisitions, including purchase of \$300 million Wheel-End division from the Budd Company. Received TQ Team Award and Special Recognition Award from CEO for work on the acquisition.

Wilmington Trust Company, Wilmington, Delaware

1988 – 1991

Private Banking Officer & Portfolio Manager

American National Bank & Trust Company, Chicago, Illinois

1987 – 1988

Management Training Program

Education

FUQUA SCHOOL OF BUSINESS, DUKE UNIVERSITY - Durham, NC
Master of Business Administration – Finance and Marketing (1993)

UNIVERSITY OF NOTRE DAME - Notre Dame, IN
Bachelor of Arts – Economics and Computer Applications (1987)

Other

Vice Chair - Board of Trustees, Wilmington Montessori School – Wilmington, DE	2002-2005, 2007-2012
Board of Directors, Tri-State Steel Corporation – Schererville, IN	2009 – Present
Treasurer - Board of Directors, Montessori Works – Wilmington, DE	2015 – Present

James Brett Taylor, Ed.D.
2409 Larchwood Road
Wilmington, DE 19810
(302) 993-6993
james.brett.taylor@gmail.com

Career Overview:

- Over 25 years of management, operational and policy experience in multiple disciplines including education, transportation, finance, public safety and social services
- Over 20 years of experience in education, including graduate and undergraduate instruction, school development, education finance and training and development for corporate, nonprofit and public agencies
- Excellent communication and facilitation skills
- Developer of curricula for in-house training, on-site facilitation and online platforms

Education: Doctorate in Educational Leadership (Ed.D.)
University of Delaware, Newark, DE. (2012)

Masters in Public Administration (M.P.A.)
University of Rhode Island, Kingston, RI (1986)

Bachelor of Arts, Political Science/Public Administration
West Chester University, West Chester, PA (1984)

Recent
Professional
Experience:

Owner and Principal, INFORM Educational Design, Wilmington, DE (2016-present)

- Professional training and development consultant for corporations to maximize organizational and personnel performance
- Developer of in-house, on-site and on-line training programs for corporate, nonprofit and government organizations
- Developer of online technical platforms for remote, 24/7 instructional delivery

Founder and Executive Director, Delaware STEM Academy, Wilmington DE (2013 - 2016)

- Founded the Delaware STEM Academy, a public charter high school focusing on project-based learning in an engineering and environmental science context
- Responsible for the management of all academic, legal, financial, operational and facility activities of the school
- Coordinates all fundraising and community and government affairs activities
- Serves as ex-officio for the Board of Directors

Special Assistant for Legislation, Budget and Policy, Delaware Department of Transportation, Dover, DE (2007- 2015)

- Advised the Secretary of Transportation on federal, state and local policy issues
- Coordinated transportation policy with Delaware Congressional offices, Governor's office and national and regional organizations
- Key contact with State agencies on environmental, public safety and financial policy issues
- Reviewed and recommended financial alternatives for capital infrastructure in preparation for legislative action and grant submissions
- Developed and facilitated year-long Leadership Academy for the Northeast Association for State Transportation Officials (NASTO)
- Developed and facilitated DelDOT's strategic planning process and its mission and vision development
- Facilitated DelDOT Leadership Academy's Project Implement Pprocess

Adjunct Instructor/ Masters in Business Administration / Environmental Stewardship.
Wilmington College, Wilmington, DE (1990- Present)

- Over 25 years of teaching experience, both in the classroom and online
- Certified hybrid and online curricula developer and trainer
- Currently teaching Financial Analysis for Environmental Policy and Environmental Regulations and Ethics in the Masters in Business Administration program
- Taught Business Management courses at the University for over 20 years

Adjunct Professor / Masters in Mental Health Counseling / Economics.
Springfield College, Wilmington, DE (2009-2014)

- Taught Economics and Social Justice to Masters in Mental Health Counseling students

Chief Financial Officer. Red Clay Consolidated School District. Wilmington, DE (2003-2007)

- Responsible for all financial and accounting activities for a 15,000 student district, including budget development, accounting, payroll, debt management and revenue collection
- Responsible for the \$195 million major capital improvement program for 26 schools
- Director to the Red Clay Education Foundation, a non-profit educational supporting organization to the Red Clay Consolidated School District
- Primary district liaison with State, legislative and other district personnel on financial matters concerning education in Delaware

Director of Bond Finance. Delaware Department of Finance. Wilmington DE (2001-2003)

- Responsible for all aspects of debt management for the State of Delaware
- Performed financial analyses for sizing and timing of debt issuances
- Served as liaison with bond rating agencies, institutional investors and public on state debt
- Coordinated all legal, tax and financial disclosure activities
- Provided technical assistance to State issuing authorities, including housing and transportation

Additional
Experience:

Assistant Director, Finance Division, Transportation Trust Fund, Delaware Department of Transportation (1998-2001)
Executive Assistant to the Secretary, Delaware Department of Public Safety, (1993-1997)
Director, Department of Real Estate and Housing, City of Wilmington, DE (1992-1993)
Deputy Director, Department of Real Estate and Housing, City of Wilmington, (1991-1992)
Budget Manager, Office of Management and Budget, City of Wilmington, DE (1989-1991)
Director, Program Development, Government Systems, Sedona Corporation (1987-1998)
Staff Analyst, Legislative Budget and Finance Committee, Pennsylvania General Assembly. Harrisburg, PA (1986-1987)
Graduate Intern, Office of Technology Assessment, U.S. Congress. Washington, DC (1986)

Continuing
Education:

Strategic Leadership for State Executives, Duke University (1995)
Certification, Instructional Technology, Delaware Technical and Community College (2005)
Certified Hybrid and Online Instructor (2014)

Skills:

Proficiency in Blackboard, Moodle, Microsoft Frontpage, Microsoft Publisher, Micrografx Simply 3D, Abobe Photoshop, Microsoft Office Applications (Word, Excel, Powerpoint, Access), SAS statistical packages, Java Script

Academic and Professional Development Experience

Wilmington University (2010-present) - Masters in Business Administration

Strategic Planning for Environmental Sustainability

Strategic Planning for Organizational Sustainability provides students with an understanding of strategic planning techniques integrating environmental and energy sustainability principles to improve the organization's bottom line. Students will learn concepts relating to costing, operational and capital improvement decision-making, risk assessment, cost / benefit and profitability analysis, supply chain and other external value relationships and avoidance of liability and other legal implications associated with governmental regulation and corporate governance. (Developed course curriculum)

Economics and Financial Analysis for Environmental

This course creates analytical approaches to determining benefits for companies in achieving environmental sustainable practices. Information on the economy, government, financial markets, academia and environmental industries will be used to analyze opportunities for companies to determine the best cost/benefit ratio for changing to the new economy of environmental sustainability. (Developed course curriculum)

Environmental Regulations and Ethical Issues

This course explores legislative, regulatory and ethical frameworks for businesses and government activities in environmental planning and project development. Students become knowledgeable in major federal and state laws and regulations, such as the National Environmental Protection Act, Clean Water Act and the Clean Air Act. The regulatory process is also explored. (Developed course curriculum)

Wilmington University (1991-2010) – School of Business Management

Introduction to Public Administration

This course is an introductory evaluation of public administration in multi-disciplinary terms as a policy process, management vehicle, and bureaucratic structure. The scope of the course is necessarily broad, with the clear expectation that students develop rigorous conceptual strength as a foundation for the analysis of both theories and issues.

Principles of Management

This course introduces students to major concepts and principles of the business organization, including authority and responsibility span of control, hierarchy, delegation, and functionality. The management process (planning, organizing, staffing, directing, and controlling) is presented with particular attention to behavioral dimensions.

Organizational Behavior

The dimensions of organizational behavior are examined with particular emphasis on formal organizations, individual and group processes. Tools and methods available to a manager for integrating individuals and groups in business are reviewed.

Supervisory Management

The supervisor's relationship to the total management environment is analyzed. The supervisor's management efforts are discussed, as well as the relationship between supervisor and individual employee. This contemporary course is helpful to any student interested in the principles and practices of effective supervision.

Business Ethics

This course begins with a consideration of the meaning of ethics. Several philosophical approaches to ethics are reviewed. Ethical decisions are examined regarding consumers, employees, and relations with the rest of society. Every effort is made to define ethical conduct in the theoretical and pragmatic sense so that students are aware of the concept of ethics and its importance.

Global Business Management

This course presents an analysis of areas involved in managing business in an international environment. Areas of concentration include: political, legal, economic, cultural, and financial factors which influence doing business in a foreign country. Additional factors of human resource management and strategic planning will be addressed. To operate effectively, businesses must understand the differences between managing solely in a domestic environment compared to an international one.

Operations and Systems Management

The course reviews the design, operation, control, and monitoring of the operations system in a variety of organizations. Topics include forecasting, operations planning and scheduling, materials requirements, purchasing, process design, and quality management. Additional analysis of major problems faced by operations managers at different levels of management is included.

Labor Relations and Collective Bargaining

Bargaining relationships, collective bargaining content, and the use of mediation are discussed in this course. Arbitration and other approaches to resolve conflicts are considered.

Organizational Development

This course studies the structures and dynamics of organizations as complex systems. Students examine theories and concepts which explain organizational behavior and productivity. Organizational norms, cultural design, and structure are explored

Project Management

This course focuses on the various functions associated with managing a project. Topics covered in the course include: the project manager role, relating the statement of work (SOW), scheduling processes, estimating methodologies and budgeting, quality, risk management, communications, procurement, team structures/practices, and understanding the importance of establishing variance and change thresholds for scope and control. Students will gain knowledge in starting, controlling, managing, and completing diverse projects in addition to solving problems associated with these projects.

Springfield College (2009-2010) – Masters in Mental Health Counseling

Research and Evaluation

This course provides experience with a sequential framework of the research process, including groundwork, measurement, design, analysis, and interpretation. Included are types of research, basic statistics, research report development, and implementation. Program evaluation and needs assessment are also discussed. Legal and ethical issues of research and evaluation are considered.

Economics and Social Justice

This course examines the history of and current thinking about the causes and consequences of economic inequities in the United States and around the globe, including an analysis of the ideologies and moral justifications for support of the existing economic system. Participants also have the opportunity to formulate their own ideas about what a just economic system might look like, to offer informed opinions about the changes that would be needed to create it and whether development of such a system is actually possible.