

Bluffview Montessori School Candidate Questionnaire

Complete this form and return to the Bluffview Montessori School Board Development Committee. Your responses will be shared with the greater Bluffview community.

In 2-3 sentences, describe why you are interested in serving as a board member of Bluffview Montessori School.

I have always been involved in service to the Winona community in some manner during 36 years I have lived here. While I did not proactively seek this position, I feel education is an essential component of a healthy, vibrant community. As a community representative on the Board, I feel I can provide positive input to the Board and Bluffview Montessori.

Have you served on any Bluffview committee(s) in the past? If yes, please provide the committee details and the dates you served.

None.

Have you served in a board role with other organizations? If yes, please provide the name of the organization(s), mission or line of business, your board role and the dates you served.

I have been on multiple boards over the years. Here are some of the organizations I have served as a board member on (Dates can be provided if needed).

Winona Volunteer Services (2019 to the present). Past Treasurer.
Winona Community Foundation (Past Board chair)
Foundation for Winona Area Public Schools
Family & Children's Center (Past President)
Winona Area YMCA
Winona Area Red Cross
Winona Area Youth Hockey Association

Please provide all pertinent work or community experience and employment roles you believe make you a qualified candidate to serve on the Bluffview Board of Directors:

In addition to my past board service listed above, I feel my professional background can be helpful to Bluffview Montessori.

I am a (CPA) Certified Public Accountant, having worked in public accounting for ten years and working for ten years as a corporate controller. I am also a CFP (Certified Financial Planner) and have worked as an investment advisor for over twenty years. I feel this experience is beneficial in understanding an organization's financial performance and current condition.

Please choose two of the following eight board topic areas and describe how your background will enable you to provide collaborative leadership and make a significant contribution as a board

member: 1) educational expertise, 2) finance, 3) fundraising, 4) governance, 5) human resources, 6) legal, 7) marketing/communications, 8) strategic planning.

Finance – as mentioned above, I feel my professional experience will be helpful to Bluffview Montessori.

Marketing/Communications – While I hold no professional designations, marketing has been an important aspect of growing my Investment Advisory practice. Recognizing how to best market the service Bluffview Montessori offers is something I feel I can have a positive impact on.