# bizwomen portland business journal MENTORING MONDAY, February 12, 2018

A speed coaching and networking event powered by bizwomen.

PORTLAND Business Journal



### Table #1 | Mary Lee Alder, CFRE

Chief Development Officer, Girl Scouts of Oregon and SW Washington

With 15 years in development, Mary Lee Alder brings a wealth of knowledge around planned giving, major gifts, events and grant writing, from her time at Self Enhancement, Inc., and Medical Teams International. In her five years at Girl Scouts of Oregon and SW Washington, Mary Lee's team has increased contributed revenue by 33 percent. She is the board president of Willamette Valley Development Officers and serves on its equity committee, and she consults pro bono with small non-profits on their development efforts. Prior to her development career, she was in a variety of sales and sales management positions. Her journalism degree is from Louisiana State University.



#### Table #2 | Christy Aleckson, MBA

Owner and financial Advisor, Single Point Financial Advisors

As owner and financial advisor at Single Point Financial Advisors, Christy works actively with individuals, families, and micro/small business owners. Beginning in 1996, Christy started her venture into the financial services industry. She specializes in pre and post retirement planning as well as wealth accumulation and protection for individuals, families, and small businesses. She believes in providing focused and consistent service to her clients. She believes that financial issues do not have to be overwhelming and works to educate her clients about the options they have to Financial Services, Portland Metro Chapter.



### Table #3 | Cristina Baez

Owner/Operator, Ataula, 180 Xurros, Chesa, Patria

As a young girl, Cristina was always seduced by the ritual of cooking. She remembers spending countless hours sitting at the kitchen countertop watching her mom and grandmother cooking recipes from the previous generations and putting their own twist on things, trying as they seasoned along. In her mid-20's she became one of the youngest culinary instructors at the university in Puerto Rico, Carolina as well as the best Culinary School in the Caribbean, The Univercidad del Este. Nowadays, Cristina runs some of Portland's hottest spots including the modern tapas with the PNW twist, Ataula, since 2013. In early 2016 she co-founded Portland's first x(ch)urros shop, 180 Xurros with husband Jose Chesa. All this while doing small projects and consulting projects in Puerto Rico, Spain and Portland, OR.



#### Table #4 | Gwen Conner, MS, MBA

Director, Business Accelerator, Providence Health & Services

Gwen Conner is a catalyst leader with 20+ years of experience powering teams to create new approaches that will help us improve our health and ultimately our experience in life. At Providence Health & Services, the third largest not-for-profit health system in the U.S., Gwen leads the first business accelerator, expanding a 160 year-old brand into a consumer-oriented, digital future. Over the last five years, Gwen has built a vibrant grassroots innovation platform that leverages collective problem solving skills of the organization to address corporate challenges and has resulted in a host of transformative pilots.



#### Table #5 | Katherine Cowan

General Counsel and Corporate Secretary, Fortior Solutions

Katherine Cowan is the General Counsel and Corporate Secretary of Hillsboro-based Fortior Solutions (formerly named SureID, Inc.), an industry leader in providing highassurance identity solutions to DoD and critical infrastructure. Fortior Solutions' patented identity solutions combine registration, identity proofing, background screening, credentialing, identity management and electronic validation. Ms. Cowan manages the company's legal and government affairs and has been with the company since 2003.



### Table #6 | Linette Dobbins, CFP®

President/CCO, MWM; Co-Branch Manager, RJFS

Since 1988, Linette Dobbins, CFP® has been a driving force behind the success of McGee Wealth Management, Inc., a Registered Investment Advisor, helping develop the business into one of Oregon's leading wealth management firms. As President and Chief Compliance Officer, Linette helps define and implement the firm's vision. She interfaces with regulatory agencies, and supervises all investment and financial planning functions.



### Table #7 | Debra Dunn

President, Synergy Resources Group

For over 30 years, Debra Dunn, president of Synergy Resources Group, has applied her executive leadership and business acumen to assist organizations and individuals meet and exceed their goals. Debra's strategic and collaborative approach to business consulting has helped others navigate around unexpected roadblocks, find the extra momentum to reach the next level of success and keep their companies and careers moving forward. She specializes in working with organizations that are facing change, challenges or looking to transform.



### Table #8 | Jessica Elkan

Director of Development & Communications, New Avenues for Youth

Joining New Avenues in 2009, Jessica has seventeen years' experience in the nonprofit field as a development officer in health and human services organizations. At New Avenues, she has led efforts to secure resources for agency programs, forged business and community partnerships, and worked with the Board of Directors to design and implement strategic initiatives. Jessica has played a key role in many agency milestones including closing out the Future of Possibilities \$5.5M capital campaign to purchase the agencies Killough building and raising funds to expand the agency's social purpose enterprises. In her role as Director of Development & Communications, she leads all agency fundraising activities; creates plans to secure resources for operating, endowment, and capital budgets; oversees special events, planned giving, public relations, volunteer programming, and marketing; and serves as staff liaison to the Ambassador Board.



### Table #9 | Su Embree

President, DHM Research

Su Embree is the President of DHM Research, the premier opinion research firm in Oregon with offices in Portland, Seattle and Washington, DC. The firm studies the values and beliefs of people on issues that matter to them, and provides those insights to leaders in the community to plan and develop smarter policies. The data driven insights from DHM Research has advanced family-wage jobs, early learning and K-12 school quality, transportation safety, healthy living and disease prevention, air and water quality, and a host of issues that improve communities across the country.



### Table #10 | Maggie Finnerty

President & Executive Director, Oregon Entrepreneurs Network

Maggie has a long history of supporting entrepreneurs. She practiced corporate law for nearly five years at Stoel Rives, with a focus on small and emerging companies. She was the VP of Business Development at a Portland startup, and developed and taught the first "Law for Managers" course at PSU. She later joined the faculty of Lewis & Clark Law School to launch the Small Business Legal Clinic (SBLC), where she both taught and practiced law and also served as the SBLC's Executive Director, which provides legal support for low-income entrepreneurs. She has also served as the VP of Investor Stewardship at Greater Portland Inc. and most recently as a Client Relations Manager at Perkins Coie.



### Table #11 | Maxine Fitzpatrick

Executive Director, Portland Community Reinvestment Initiatives, Inc. (PCRI)

Maxine was brought on as PCRI's first Director in 1993. PCRI is a community development corporation specializing in the development and management of affordable housing in the City of Portland. Currently, PCRI is working on a tenyear displacement mitigation initiative to construct 1,000 affordable homes; 800 homeownership and 200 rentals in hopes of providing displaced NE Portland residents an opportunity to return to North and Northeast Portland.



### Table #12 Angie Galimanis

Owner/President, Lawrence PR

Angie Galimanis brings twenty years of public relations and marketing experience to her position as owner and president of Lawrence PR. She manages the development and execution of strategic public relations campaigns that help clients break through to consumers and the media. Angie's company, Lawrence PR - named after her grandfather, Lawrence Rora - manages campaigns and provides strategic public relations counsel for a broad range of clients including The Stephanie Inn, Consumer Cellular, Surfsand Resort, Portland Japanese Garden, Tetherow, Tony's Chocolonely, World of Speed, Oregon's Mt. Hood Territory, Willamette Valley Visitors Association, Public Coast Brewing, BurnCycle and The Vintages.



### Table #12 | Katie Schoen

Vice president, Lawrence PR

As vice president at Lawrence PR, Katie Schoen shares more than 12 years of integrated marketing experience. She has worked with clients in a variety of industries, with a particular emphasis on consumer, food/beverage, travel, hospitality, business-to-business, education and non-profit. With each of her clients, Katie provides overarching marketing strategy and develops impactful public relations campaigns.



### Table #13 | Alyssa Gasca

**Owner, Spark Executive Solutions** 

Alyssa has led many companies through large-scale transformation efforts. She has also designed and led hundreds of workshops, for over 40 organizations, with groups from 2-400 participants, across 15 countries, and has helped thousands of individuals build their leadership, management, and interpersonal skills. She spent 12 years at Intel learning how top companies create world-class leaders, and nearly 10 years running SPARK Executive Solutions. Alyssa has an MA in Adult Education from Portland State University with a focus on Corporate Training & Development, and a BA in Psychology from Oregon State University



### Table #14 | Missy Gerber

President, Organizers Northwest

Missy founded Organizers Northwest with the simple yet powerful motto of 'Less Mess, Less Stress, Better Life'. Her experience as a teacher and project manager for a fortune 100 company taught Missy the value of being organized. In 2004 she decided to channel her passion and more than 25 years of experience into her own business.



### Table #15 | Jessica Getman

President, Brown & Brown Northwest Insurance

Jessica Getman is President of Brown & Brown Northwest Insurance, a division of Brown & Brown Insurance. In addition to managing the Northwest region, including offices in Portland, Bend, Medford and Southwest Washington, she provides service and consultation to many large, commercial clients. In 2012, Jessica relocated to Portland, Oregon, to lead Fullerton & Company, a division of Brown & Brown. In 2013, Beecher Carlson, a Northwest agency, joined the Brown & Brown family, and she was named President. In February 2016, Lumbermens Insurance and Risk Solutions, a firm trusted for more than 100 years in the central Oregon joined forces with the Bend profit center of Brown & Brown Northwest Insurance. The expanded operation, led and operated locally, reports directly to Mrs. Getman.



### Table #16 | Tania Gitch, CPA

Shareholder, Tax Department Chair, Geffen Mesher

Tania has more than 20 years of public accounting experience working alongside owners of closely held businesses and individuals, taking clients from start-up to succession planning. By being an active team member and trusted advisor, she's acquired a wealth of knowledge and experience that she passes along to help other clients achieve their goals. She takes the time to fully understand accounting, tax and management challenges that are unique to her clients' industries.



### Table #17 | Krista Grinstead

Owner/Operator, Comfort Keepers Home Care

Krista Grinstead has enjoyed over 27 years in Medical Equipment Sales working with some of the healthcare industries largest and most respected companies in the world. With this experience she brings a comprehensive range of knowledge and technical/medical prowess to her current role as owner of Comfort Keepers® Portland. Throughout her professional experience and continued education, Krista saw, firsthand, the immediate need for seniors to have quality in-home care. This became even more apparent as Krista's own aging family members and friends began to require assistance. After discovering Comfort Keepers, it was clear to Krista that the company's mission and dedication – to provide seniors with compassionate, professional, in-home care – aligned with her own. As a member of the Portland community for nearly 10 years, Krista is proud to give back to those who deserve the highest quality care.



### Table #18 | Suzanne Hanifin

CEO, Acumen Executive Search

In 2007, Suzanne started Acumen. Acumen is a premiere boutique, woman-owned Executive Search firm in Oregon with a global reach, working holistically and strategically with its clients to understand their business and culture to facilitate talent to solve meaningful problems. Because Suzanne come from a business background and has been a hirring managers herself, she knows the right questions to ask. After 10 years, the company's tagline is still relevant: We listen. We care. We deliver.



### Table #19 | Diana Hoff

Founder & President, NAWBO Oregon; Executive Director, The Renaissance Foundation

As Executive Director of The Renaissance Foundation, Diana has helped mentor many young people from disadvantaged families get the education they need to succeed in life. In addition to her contributions in the education arena, Diana founded the Oregon chapter of NAWBO in 1975. NAWBO propels women entrepreneurs into economic, social and political spheres of power worldwide. Decades later, NAWBO is still the only organization that solely represents the interests of women entrepreneurs in all industries.



#### Table #20 | Anna Hutson

Founder and CEO, Avenue Agency

Anna Hutson has spent the last 10 years building companies and driving agency growth. In 2016, Hutson founded and launched Avenue, a marketing agency that specializes in connecting brands to their customers through creative, measurable and data-driven digital experiences. As an agency and client leader with experience spanning agencies in the digital, traditional, full-service and creative spaces, Hutson has helped companies ranging from Fortune 500 brands to start-ups and local businesses develop strategic marketing plans, launch advertising campaigns, tell their stories through digital and social communications, solve marketing challenges and approach business growth in a unique and measurable way.



### Table #21 | Kathleen Kee, CFP®

CEO and Partner, Confluence Wealth Management

Kathleen started in financial services over 25 years ago, beginning in client services and rising to an advisor and partner before becoming CEO. Since 2010 she has served as the firm's CEO and leads the company in its strategic planning, corporate performance, and visioning. Confluence Wealth Management is an independent wealth management boutique, women and minority owned, serving high net worth individuals and families. Throughout her professional career, Kathleen has been committed to advancing the CFP® profession. She has participated in local professional groups as well as the national CFP Board of Professional Review, the disciplinary committee enforcing practices and standards for advisors throughout the country.



#### Table #22 | Wendy Lane Stevens

Founder and President, LANE; Managing Partner, Finn Partners

As founder and president of LANE, an integrated public relations agency, Wendy has more than 30 years of experience in the combined areas of strategic communications, media relations, crisis communications, reputation management, branding and product launches. Wendy founded LANE in 1990 as a professional services firm focused on driving business and sales success for clients through strategic public relations and marketing counsel.



### Table #23 | Kristi Langdon

Head of Digital & Customer Experience, Daimler Trucks North America

Kristi is focused on transforming the customer experience at DTNA. She works with DTNA's vast dealer network to drive towards a future of connectivity. Prior to joining DTNA in 2014, Kristi held both marketing and finance leadership positions in the banking industry. She has also worked as an entrepreneur and a consultant. Kristi holds an MBA from the University of Washington as well as a Project Management Professional certification.



#### Table #24 | Brenna Legaard

Shareholder, Schwabe Williamson & Wyatt

Brenna Legaard, a registered patent attorney, helps established and emerging technology companies in the medical, software, high-tech manufacturing and sporting goods industries create holistic intellectual property strategies that support long-term business goals. She divides her practice between litigation and transactional work in addition to leading Schwabe's Technology industry group. Whether through protecting innovations, licensing or acquiring technology, Brenna assists clients in developing strong intellectual property positions.



#### Table #25 | Kelly Long

Co-Founder and Partner, Manifold

Kelly Long is a Co-founder and Partner at Manifold, managing high profile launches for clients like GitHub, Levi's, Nest, Zynga and others. Prior to Manifold, Kelly held senior positions at Yahoo! in the Global Buzz Marketing department working with brand marketing and product leads, as well as global advertising partners, to create and implement unique, nontraditional marketing and advertising campaigns.



#### Table #26 | Heather Martin

Executive Director, Classic Wines Auction

Heather Martin serves as Executive Director of the Classic Wines Auction (CWA), one of the most successful fundraising organizations in the region and one of the largest charity wine auctions in the country. Under her management, over \$3.5 million was raised in 2017 and collectively \$35 million has been raised since 2004. Through her strategic planning, organizational management and fundraising, CWA annually coordinates 50 winemaker dinners, a gala auction, a young professionals event, a two-day Polo Championship, and many other dinners and parties throughout the year bringing more than 3,500 philanthropists and wine enthusiasts together to support children and families.



### Table #27 | Michele Maupin Foundary EMPOWERED LLC

Founder, EMPOWERED, LLC

Michele Maupin founded The Empowered Program in 2007. She travels all over the US and beyond to Empower People Who Help People, through communication and personal safety. She holds a black belt in American Kenpo Karate, is licensed by the Oregon Department of Public Safety Standards and Training as a Security Officer and Executive Manager, and has a Bachelor's degree in Organizational Leadership from George Fox University.



### Table #28 | Judith McGee

Chair/CEO, McGee Wealth Management

Judith is frequently recognized as one of the nation's top wealth managers by leading industry publications. Among them, Barron's magazine has named McGee to its list of Top 1,000 Wealth Advisors in the U.S. every year since 2009 and has ranked her as Oregon's top advisor. Financial Times listed her on their list of Top 400. Nationally in 2014, and in 2015, Judith was inducted into Research Magazine's Advisor Hall of Fame.



### Table #29 | Chris Otis

Executive Director, SMART (Start Making A Reader Today)

Chris Otis joined SMART as Executive Director in December 2010. In that time, she has led the effort to grow service numbers, create solid and sustainable finances, and oversee a number of key and transformational initiatives, including an emphasis on equity and inclusion as well as a three-year focused effort looking at quality and qualitative aspects of the program. Prior to joining SMART, she served as Executive Director for the Children's Relief Nursery, a child abuse prevention program serving high-risk children and families in Portland.



### Table #30 | Linda Pearce

Executive VP & CFO, Tillamook County Creamery Association

Linda Pearce joined the Tillamook County Creamery Association (TCCA) as chief financial officer in 2013, to develop and lead the 105-year-old multi category dairy cooperative's strategic growth initiatives. Since joining TCCA she partnered with the CEO to lead the fourth consecutive year of double digit growth in sales and earnings. The results of executing on the strategic plan have been increased shareholder returns each year.



### Table #31 | Kristin Quinlan

CEO, Certified Languages International

Kristin Quinlan serves as CEO of Certified Languages International, a U.S. based ondemand telephone interpreting company founded in 1996. Kristin joined the company in 1999, rising to CEO in 2006. A recognized leader known for approaching business with a unique blend of industry-wide collaboration and "bottom up" management style, she's led CLI to be named six times to the Fortune 500/5000 list of America's fastest growing companies and named third among leading telephone interpreting companies worldwide.



### Table #32 Anita Ramachandran

Director of MicroMentor, Mercy Corps

Anita Ramachandran is the Director of MicroMentor at Mercy Corps. In her role, Anita is focused on team management, strategic planning, business development, partnerships, public relations, and thought leadership. She is also the General Manager/Board Chair of MicroMentor LATAM, a Mexico based social enterprise spun out of Mercy Corps to support Entrepreneurs in Latin America. She is also the co-founder and held a leadership role for 15 years at a local non-profit, SAWERA that assisted South Asian women and children affected by domestic violence since 1997.



### Table #33 | Jan Robertson

CEO, Norris, Beggs & Simpson

Jan Robertson was named CEO of NAI Norris, Beggs & Simpson in 2011, and is responsible for oversight and management of all of the company's business operations, strategic planning and financial management. Jan joined NAI NBS in 1981. She was named Vice President and Corporate Manager of Administration in 1989, and four years later became a partner of Norris, Beggs & Simpson Northwest Limited Partnership and, as Executive Vice President, responsible for all aspects of the company's property management and administrative functions. Jan was promoted to Chief Financial Officer in 2005.



### Table #34 | Jean Roque

President & Founder, Trüpp

Jean Roque is the founder and President of Trüpp, a human resources company providing HR consulting services, HR outsourcing, and leadership development solutions for organizations in the greater Portland-Vancouver metro area and throughout the U.S. Jean has a passion for helping organizations thrive. Her straightforward yet strategic approach focuses on delivering services that are tailored to the unique needs, culture, and business objectives of each organization while removing the complexity often associated with the HR function.



### Table #35 | Tina Rospond

Branch/Sales Manager, The BoxMaker

With 30 years of sales and operations leadership experience under her belt, Tina Rospond has mastered the balance between the macro and the micro economics of running a business. Tina has started her own coaching business and donates a portion of her time to helping others learn how to identify, declare, plan and process their actions to achieve their goals. Tina never finished high school, yet she rose to the top of her field. She credits her continued success to her zest to learn and the desire to disrupt the status quo.



### Table #36 | Katherine Schultz

Director, GBD Architects

A Director at GBD Architects, Katherine Schultz has dedicated herself for more than 25 years to shaping Portland—influencing both the architectural landscape of our city, and that of the design community. As a practicing Architect, Kat is driven toward projects that encompass a variety of scales, ranging from neighborhood planning efforts to large redevelopments in urban centers. She specializes in mixed-use housing, planning, and urban development. As GBD's first female Director, Katherine passionately supports creating an architectural community that is more diverse and inclusive.



### Table #37 | Jennifer Sheasgreen

President, Triumph Healthcare Finance

Jennifer Sheasgreen serves as the president of Triumph Healthcare Finance, a position she has held since 2014. In this role, Mrs. Sheasgreen has P&L responsibility for the division, oversees the day-to-day operations and leads the sales team. Mrs. Sheasgreen has over 20 years experience in executive leadership roles spanning all aspects of commercial finance within the healthcare industry to include credit, underwriting, loan closing, operations and portfolio management, and business development.



### Table #38 | Ruth Shelly

Executive Director, Portland Children's Museum

Since 2013, Ruth Shelly has served as Executive Director of Portland Children's Museum, which also includes a private preschool, public K-5 charter school, and research center. Serving nearly 300,000 children and adults annually, the Museum has a staff of 70 and an annual budget upwards of \$4 million. Ruth has been in museum nonprofit management for more than 40 years, is active locally on the Travel Portland board and the Oregon Zoo Bond Oversight Committee, and serves nationally on the board of the American Alliance of Museums.



### Table #39 | Sharon Soliday

Owner, The Hello Foundation, LLC

Sharon's advocacy for and commitment to kids has been the source of her success as CEO, her professional career as a speech therapist, and her actions as a community volunteer. She has a passion for encouraging other business owners and trusting if you support employees, employees will take care of your business. She has volunteered internationally and has been recognized on a national level for her excellent work and business practices.



### Table #40 | Tichelle Sorensen

MBA Program Academic Director, PSU School of Business Administration

Tichelle Sorensen leads the program development of The Portland MBA at Portland State University. Prior to joining PSU as an Academic Director in 2013, Tichelle worked as an attorney, practicing in the areas of intellectual property, marketing and employment law. Tichelle's prior business experience includes entertainment industry marketing and consulting, predominantly in music and gaming; strategic marketing consulting for both privately owned companies and state-owned enterprises in China; and export marketing.



### Table #41 | Suzanne Stevens

Editor, Portland Business Journal

Suzanne was promoted from digital managing editor to editor of the Portland Business Journal in March 2014. She has been with the company since 2010. Prior to the Business Journal, Suzanne spent seven years as a senior editor at The Deal in New York, where she wrote and hosted a web program focused on corporate mergers and acquisitions. Suzanne also spent time as an associate editor at Oregon Business Magazine and 12 years working in public radio, where she was a frequent contributor to National Public Radio.



### Table #42 | Serilda Summers-McGee

Deputy Director of the Bureau of Human Resources, City of Portland

Serilda Summers-McGee is the Deputy Director of the Bureau of Human Resources for the City of Portland and the Owner of Workplace Change, LLC, a company that exists to help organizations assess their workplace culture, creatively resolve identified workplace challenges, recruit underrepresented executives and staff, and retain high quality employees in an inclusive, positive, and high functioning work environment.



### Table #43 | Kami Toufar

Co-Founder, BluPrint Public Relations

Blu Print Co-Founder Kami Toufar brings over 17 years of experience providing public relations counsel and communication services to clients including Fortune 100 corporations to technology startups. Her communications expertise spans technology, business-to-business and corporate communications. Kami's career path in public relations spans small, medium and large PR and advertising agencies. She has garnered media placements for her clients in The New York Times, USA Today, Business Week, The Wall Street Journal and MacWorld among many trade and international publications.



### Table #44 | Lillian Tsai

President, TsaiComms; Consultant, Equity & Inclusion Lead, Solid Ground Consulting

Born and raised in Malaysian Borneo, award winner coach, facilitator, trainer and consultant Lillian A. Tsai has been working with a plethora of organizations on crosscultural competency, global communications, and diversity, equity and inclusion (DEI) since 2005. This includes: assessment of organizational effectiveness, making recommendations for and the implementation of strategic DEI programs, diversity councils, program design and management, facilitation of team interventions across departments and within teams, coaching of executives and managers who have diverse work teams, professional development coaching of foreign- and U.S.-born persons of color, conflict management, and team interventions.



### Table #45 | Linda Weston

Principal, Rapporto

Linda Weston has more than thirty years of senior leadership experience in tourism, professional sports, and the entrepreneurial ecosystem. During her 17 years of leadership, OEN served more than 55,000 participants across Oregon and SW Washington, and Linda generated more than \$12.2 million in sponsorship, donations, and grant funding to expand access to services for entrepreneurs in both urban and underserved areas. Linda retired from OEN in December, 2016, and launched Rapporto, LLC which provides consulting services and coaching to both companies and non-profit organizations.



### Table #46 | Peggy Willer

Commercial Banking Market Manager, Bank of America

Peggy has 30 years of experience in Corporate and Middle Market Relationship Management. A majority of her career has been with Bank of America in Portland with prior positions at Wells Fargo Bank (First Interstate Bank) and First National Bank of Chicago (now JPMorgan Chase) in Chicago. As part of the region's management team, Peggy's responsibilities include guiding and assisting client teams in advising companies on the appropriate capital structure and alternatives to achieve business strategic objectives. Peggy also oversees and mentors a team of bankers; and helped start up BofA's local "LEAD For Women" chapter; and she serves on the local BofA Foundation Committee that manages local philanthropic efforts.





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