



CBFA Board Personal Fact Sheet

Your name has been submitted as a potential candidate for an elected board position on the CBFA Board of Directors. If you are interested in serving the membership in this capacity, please respond to the following questions and send us a copy of your CV. Your answers to these questions and your CV will be reviewed by the CBFA Nominating Committee.

Please send this completed sheet and your CV to the Chair of the Nominating Committee.

- 1) Are you willing to serve and, as far as you know, are you able to serve for the next three years? (If your answer to this question is “No”, it is not necessary to complete the rest of the questionnaire).

Yes

- 2) Is your academic institution willing to support you serving on the CBFA Board of Directors? If elected, you will be expected to attend both the Fall Board of Directors Meeting, which begins one day before the CBFA Annual Conference, and the Spring Board of Directors Meeting. Hotel rooms and meals during these board meetings are covered by the CBFA, but transportation costs for these meetings must be covered by the board members or their institutions.

Yes

- 3) How long have you been a member of the CBFA?

I believe I initially joined in 1989 and stayed a member until 2007. I left higher ed at that time and returned in 2010 when I joined Ohio Wesleyan University. I rejoined CBFA in 2022. I had some health issues the winter of 2022-23 and may have let my membership lapse due to lack of attention. I am planning on attending the November CBFA conference and renewing my membership.

4) What has been your involvement with and contribution to the CBFA in the past?

I basically attend many CBFA conferences in the early part of my academic career and found the fellowship and support from other Christian faculty to be very encouraging. In 2022 I presented at the CBFA conference held at Lipscomb University a presentation titled, "Building a Culture of Character in our Students using the Leadership Character Development model: A program-wide, integrated, and foundational approach."

5) What has been the primary value of the CBFA to you during these years?

Fellowship and support from a broad range of faculty. Mentoring from older faculty that I greatly admired and learned a great deal from.

6) What other business or academic organizations are you a member of? What offices have you held?

From my CV:

CURRENT PROFESSIONAL INVOLVEMENT:

Owner, GrowthMatrix, Inc., Lewis Center, OH (January 2003 – Present)

- Advising and consulting service focused on strategic, agile, organizational development, and leadership to improve performance. Previously, GrowthMatrix provided marketing strategy services to higher education institutions, nonprofit organizations, and for-profit firms; most significant is the collaboration with eight liberal arts universities providing services including branding, strategy, creative, development, production, and media execution (www.growthmatrix.com).

Board of Directors, Better Business Bureau of Central Ohio, Columbus, OH (January 2017 – Present)

- Provide advice and counsel in support of the BBB's mission to be the leader in advancing marketplace trust (www.centralohio.bbb.org).

Board of Directors, Center for Character Ethics Foundation - BBB, Columbus, OH (January 2022 – Present)

- Provide advice and counsel in support of the Center for Character's mission in support of building better businesses and inspiring future leaders (www.centerforcharacterethics.org).

Adjunct Faculty, Trinity Western University, Vancouver, BC (August 2010 – present).

- Adjunct Faculty teaching intensive MBA courses on-site in Canada, online/hybrid format, and travel study programs (Western and Central Europe).

PREVIOUS PROFESSIONAL INVOLVEMENT:

Acting Executive Director and Board of Directors, The Clapham Institute, Annapolis, MD (August 2019 – July 2021)

- The Clapham Institute exists to promote human flourishing. Specific focus is on educating entrepreneurs and corporations to build organizations on the principles of virtuous capitalism embracing a deep understanding of human nature that promotes human flourishing and business success (www.claphaminstitute.org).

Board of Directors, Levante Living Limited Partnership and LLLP, Toronto, Canada (October 2017 – December 2020)

- Levante Living Limited Partnership and LLLP is a fund management firm that manages the operational assets of the Levante Living fund, engages in the acquisition of financially sound assets for the fund, and focuses on achieving the investment performance of the fund.

Independent Trustee, Levante Living Trust, Toronto, Canada (October 2017 – April 2020)

- Levante Living Trust is an unincorporated open-ended investment trust established under the laws of the Province of Ontario. The Trust invests in health care related businesses with a focus on the retirement and long-term industry in Canada through the Levante Living investment fund (www.levanteliving.com).

Board of Directors, All THAT, Columbus, OH (September 2015 – August 2019)

- All THAT is a non-profit organization providing mentoring to high school teens by helping improve their academic achievement, social skills, and relationships with others.
- Provide organizational review, assessment, and strategic guidance to the board and executive director (www.all-that.org).

Investment Committee Member, Southbridge Capital, Inc., Toronto, Canada (July 2015 – June 2016)

- Southbridge Capital, Inc. is a fund management firm that founded and manages the Southbridge Health Care Fund, a \$135 (CAD) million-dollar fund.

Board of Directors, Southbridge Investment Group, Cambridge, Canada (November 2010 – December 2014)

- Southbridge Investment Group is a private equity firm whose expressed mission is to generate a return on investment in order to increase the charity capacity of the Bridgeway Foundation – a Canadian foundation dedicated to funding nonprofits in Canada.

7) Please tell us about your involvement in your community and church.

I attend LifePoint Church in Lewis Center, Ohio (<https://www.lifepointohio.com/>)
I serve on my HOA Board of Directors

8) What roles of leadership have you held at your academic institution?

At OWU I have held these roles:

- Director, Latham Entrepreneurial Scholars Program (Fall 2018 – Spring 2023)
- Chair, Committee on Enrollment and Communications (Fall 2018 – Spring 2021)
- Chair, Committee on Intercollegiate Athletics (Fall 2016 – Spring 2019)
- Chair/Member, Chief Communications Officer Search Committee (Fall 2012 – Spring 2013)

9) What are your teaching, research, and/or consulting interests?

My primary interest is to be engaged in business through consulting, business development, and serving on various business boards. At OWU, my research evaluation includes this approach to research versus the typical “publish or perish” model.

10) What particular skills and experience would you bring to this elected board position?

I am a strategic thinker with the ability to execute tactically. I would bring an alternative voice to the board. I have served at both a Christian university and my current secular university and understand the joys and pains of each institution.

11) Have there been other faculty members from your institution who have served on the CBFA Board of Directors?

No.

12) Do you have a vision for the CBFA? If so, please elaborate.

I would encourage the CBFA to renew its commitment to faculty fellowship, support, and mentorship. I found these aspects of the CBFA to be most influential in my early career and would like the CBFA to maintain and improve on these areas.

13) What changes or improvements would you like to see in the CBFA?

Given that I have only recently rejoined CBFA, it would be unfair and premature for me to comment on this specific question.