

JOSEPH R. BOEKE
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Pasadena, California 91125
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OBJECTIVE: An institutional advancement position requiring creativity and innovation as well as strong leadership, interpersonal and analytic skills.

SUMMARY:

- An excellent reputation as an innovative, results-oriented team leader who gets things done.
- Demonstrated comfort and skill in working with Trustees and other high-level volunteers and prospects.
- Proficient at independently handling and completing projects. Assume responsibilities easily and confidently.
- Strong oral and written communication skills, a strategic communicator with the ability to build support for new initiatives.
- Extensive experience auditing and revising existing systems and programs, as well as creating and implementing new policies and procedures.

EMPLOYMENT:

CALIFORNIA INSTITUTE OF TECHNOLOGY • Pasadena, CA *April 2004 to present*
DIRECTOR OF DEVELOPMENT OPERATIONS & INTERIM DIRECTOR OF ANNUAL GIVING. Manage the Institute's Development Operations and Annual Giving departments. Oversee and manage the Information Technology, Records Management, Stewardship, Research, Special Events, and Communications units (20 FTEs). Manage and direct the Institute's annual mail, telephone and face-to-face solicitation of alumni, parents and friends producing current use, cash gifts exceeding \$3.5MM for FY06 (a 9.4% increase over FY05) from 5,088 alumni donors (27% alumni participation). Plan and administer the departments operating (\$1.5MM) budgets. Develop web applications for every unit in Development and Alumni Relations, providing technological solutions to staffing limitations. Coordinated the creation of operating procedures for all units within Development Operations, including establishing a prospect management system. Manage volunteers and work with advisory council board to establish goals and program annual volunteer conference.

WITF, INC. • Harrisburg, PA *January 2003 to February 2004*
DIRECTOR OF DEVELOPMENT. Manage the units of WITF, Inc.'s development department. Including overseeing and managing the Membership Services, Special Events, and Volunteer Services departments of the company (12 FTEs). Manage direct mail, telephone, on-air and face-to-face solicitation of WITF-TV and WITF-FM members producing cash gifts totaling \$3.25MM for FY03 (a 3.4% increase over FY02). Generated over \$275,000 in unrestricted revenue directing WITF special events, including *Gallery 2003* a live 3-day art auction, *The Next Generation Festival* (a two week long chamber music festival), and various concert and show co-promotions in the Central Pennsylvania area. Plan and administer the departments operating (\$1.5MM) budgets. Serve as development liaison to the board of directors, and chaired the board's philanthropy strategic planning committee.

MARQUETTE UNIVERSITY • Milwaukee, WI *March 2001 to January 2003*
ASSOCIATE VICE PRESIDENT, ADVANCEMENT OPERATIONS. Served as a member of the senior management team of the University Advancement division. Oversaw the operational units of University Advancement (19 FTE). Staffed the Advancement and External Relations committee of the Board of Trustees. Created and presented campaign and fundraising reports for the University's Board of Trustees and the President's Administrative Committee. Planned and administered the division's operating (\$2.5MM) and campaign (\$750K) budgets. In conjunction with the Assistant Vice President for Development Programs, created performance-tracking program for the development staff including monthly call volume and solicitation standards. With the Director of Research, designed and implemented Marquette University's prospect management system.

BUCKNELL UNIVERSITY • Lewisburg, PA*July 1997 to March 2001*

DIRECTOR, ADVANCEMENT & INFORMATION SERVICES. Created and managed the Advancement and Information Services department in Bucknell University's University Relations division (18 FTE). Coordinated *The Bucknell Campaign's* trustee outreach program: assigning and managing major gift prospects to individual trustee volunteers for qualification, cultivation and solicitation. Implemented the Harris Online Community project. Introduced a volunteer and events management program for the office of Alumni and Parent Relations. Converted the Office of Annual Giving from a manual solicitation methodology to an automated tele-fundraising system (SMARTCALL). Compiled and edited text and articles for the alumni magazines annual honor roll issue. Developed and implemented plans to meet the information needs and expectations of Bucknell's Alumni Relations, Development, Public Relations, Admissions and Career Development programs. Built the University Relations WWW site, including the implementation of a secured server for online giving transactions.

BUCKNELL UNIVERSITY • Lewisburg, PA*July 1995 to June 1997*

MANAGER OF PROSPECT INFORMATION. Supervised professional and administrative staff (4 FTE) in the conduct of all research on individuals, corporations, and foundations that are prospects for significant financial support or volunteer leadership positions within the University community. Developed the long-range plan to expand the research capabilities of the office in conjunction with *The Bucknell Campaign*. Managed the screening and assignment of potential major gift prospects and conducted prospect review meetings to coordinated prospect assignments to individual development staff. Prepared and managed the annual budget for the Office of Prospect Information and annual operating plans and objectives. Developed the BENEFACOR database's 'Major Prospects' and 'Save List Creation' modules, and trained the development staff in their use.

UNIVERSITY OF CALIFORNIA • Irvine, CA*January 1992 to November 1994*

HEALTH SCIENCES ADVANCEMENT COORDINATOR. Under the direction of the Vice Chancellor for Health Sciences Advancement, developed and implemented the fundraising plan to establish a \$1 million scholarship endowment for the medical school's MD/PhD. program. Developed and maintained a comprehensive information base on individuals, corporations and foundations of interest to the private gift support effort of the Health Sciences. Gathered and analyzed financial & biographical information to recommend giving levels and strategies for approaching prospective donors. Established and managed the department's prospect management program, including: conducting weekly prospect review meetings, determining prospect assignments and tracking follow-up. Designed and maintained computer databases for research and development staff use.

UNIVERSITY OF CALIFORNIA • Irvine, CA*July 1990 to January 1992*

STUDENT CENTER BUILDING MANAGER SUPERVISOR. Managed the activities of 12 building managers and 20 custodial assistants in the operation of the UCI Student Center. Coordinated inter-departmental staffing requirements. Conducted staff meetings. Managed the budget of the building supervision department. Provided support and customer service and support to Student Center clients. Wrote and edited the UCISC audio-visual manual. Hired and trained departmental personnel. Conducted staff evaluations.

PRESTIGE STATIONS, INC. • Cerritos, CA*April 1987 to July 1990*

A subsidiary of the Atlantic Richfield Company, Inc.

GENERAL PROCESSING ANALYST. Audited and edited the Accounts Payable Policy and Procedures Manual. As the company's representative on the project management team, oversaw the conversion and implementation of software for a new accounts payable processing system, including: coordinating and prioritizing programming and end user requirements and training key personnel to use the new system. Reported directly to the Manager of General Processing with full responsibility for the review and analysis of weekly sales and monthly franchise activity reports.

ADDITIONAL EXPERIENCE:

THE WEBB SCHOOLS • Claremont, CA DEVELOPMENT RESEARCH CONSULTANT	<i>May 1995 to June 1995</i>
HARVARD UNIVERSITY • Cambridge, MA DEVELOPMENT OFFICER, RESEARCH	<i>November 1994 to April 1995</i>
THE WALT DISNEY COMPANY • Anaheim, CA CAST MEMBER	<i>June 1984 to April 1987</i>

EDUCATION:

1991 • UNIVERSITY OF CALIFORNIA, IRVINE • Irvine, CA
B.A., Political Science
Minor, Global Peace and Conflict Studies
