

# NANCY LUBICH MCKINNEY

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**Senior manager** with diverse corporate staff experience in a services industry, who has successfully applied transferable skills to a second career in institutional advancement.

- Business Process Design & Reengineering
- Strategic & Financial Planning
- Management Reporting
- Information Systems & Analytics
- Procurement
- Risk Analysis & Management
- Governance & Compliance
- Regulatory Relations
- Marketing Communications
- Market Research
- Project Management
- Team Facilitation

## PROFESSIONAL EXPERIENCE

### UNIVERSITY OF CALIFORNIA, BERKELEY

2004 - Present

#### **Director of Donor Stewardship – University Relations**

Responsible for facilitating the Chancellor's stewardship of the campus's most generous donors, and for providing a foundational level of stewardship for the campus's entire donor population. Develop standards and tools that campus units use to steward donors. Manage 20+ discrete programs that result in 60,000+ donor "touches" each year.

- Develop and implement strategies for "best practice" programs.
- Manage campuswide donor acknowledgement programs including Chancellorial gift acknowledgements.
- Manage campuswide donor recognition programs including giving societies and honor rolls. Led the effort to revitalize the annual giving recognition program impacting 8,000+ households—cultivated agreement among key stakeholders as to the structure and features of the program, and developed a transition communication plan for donors and internal audiences.
- Manage campuswide donor reporting programs including scholarship and fellowship reporting, philanthropic impact reporting, and endowment financial reporting. Envisioned and launched the latter award-winning program impacting 2,200+ households—led a multidisciplinary implementation team, and identified an outsourcing solution for fulfillment. Envisioned and introduced annual, mass-customized impact reporting to 2,300+ households—secured the participation of all campus fundraising units, and developed the data specifications and messaging.
- Ensure that information technology and communications partners meet operational needs.
- Represent the campus within the donor relations / stewardship professional community. Serve on the national board of the Association of Donor Relations Professionals.

### INDEPENDENT CONSULTANT

2001 - 2004

Effectively managed the annual fundraising auction for Gateway High School, including donor and bidder management, event logistics, and financial controls and reporting. The auction netted proceeds of \$43 thousand, a 30% increase from the prior year and \$13 thousand above the stated goal.

Financial services clients included Bank of Hawaii and Union Bank of California. Projects encompassed risk management best practices, enhancement of regulatory compliance and corporate governance, re-design of management reporting content, business procedures and staffing, and improvement of timeliness and accuracy of reporting.

### BANK OF AMERICA, San Francisco, CA

1984 – 2001

#### **Senior Vice President – International Corporate Banking Group**

1999 – 2001

Senior Marketing Officer for the division responsible for 2,100+ international corporate client relationships representing \$92 billion of risk exposure and \$870 million of revenue.

- Developed, communicated and implemented strategies for delivering global capabilities.
  - Designed client coverage models and appropriate organizational structures.
  - Created internal communication vehicles, including presentations, management reporting and intranet presence.
- Global project manager for implementation of revised international business strategy. Strategic initiatives included reduction of risk exposure by 9%, disengagement from 28% of client base, reduction of staff by 15% and reconfiguration of delivery platform.
- Provided frequent project status updates to global business head and executive management.
  - Worked with four regional business heads to identify and resolve project-related issues.
  - Developed project tracking metrics. Worked with regional finance, human resources and project management staff to identify data sources and reporting processes to ensure accurate and timely reporting.
  - Implemented a project management discipline, including project planning, issues tracking, best practices deployment, and project status reporting.

**Senior Vice President – Corporate Procurement**

1998 – 1999

Project manager for merger transition projects focused on vendor leverage strategies. Acted as liaison between management, procurement professionals, business partners and external consultants.

- Managed telecommunications project saving \$69 million annually on a baseline spend of \$403 million.
- Managed distributed computing project saving \$42 million annually on a baseline spend of \$197 million.

**Senior Vice President – Corporate Credit Examination Services**

1996 – 1998

**Vice President**

1991 – 1996

**Financial Consultant**

1987 – 1991

Held positions with increasing responsibility for the corporation's loan loss reserve process and led related risk management projects. No significant regulatory or audit findings during 11-year tenure.

- Worked closely with Chief Credit Officer to develop \$3.5 billion loan loss reserve for a \$165 billion loan portfolio, ranging from credit cards to multinational corporate loans.
- Communicated recommendations to Board of Directors and executive management through written reports and oral presentations.
- Managed all aspects of the process including risk modeling, interpretation and assessment of results, and synthesis of 120+ portfolio level recommendations. Produced supporting credit quality reporting.
- Coordinated team representing 35+ business units with lending activity across multiple legal entities. Managed professional and administrative staff with zero turnover.
- Established six-quarter rolling credit quality forecast process. Designed and implemented model used by Chief Credit Officer and Chief Financial Officer for credit quality and provision planning.
- Provided input to business unit financial managers regarding the loan loss reserve and provision impact of business decisions.
- Performed due diligence, managed process integration, and designed and delivered training for mergers and acquisitions. Prepared valuations for debt restructurings, portfolio purchases and sales, and divestitures.
- Acted as primary liaison with regulators and external auditors.
- Reduced quarter-end process by five calendar days. Envisioned, planned and managed transition from a manually intensive process to a largely automated process.
- Led two process improvement initiatives. Resulting process modifications augmented the assessment of reserve adequacy, enhanced efficiency and improved service partner relations.
- Set priorities for analytical research and development work. Managed implementation of major enhancements to portfolio information systems and portfolio reporting.
- Re-designed migration models used to assess risk of loss from the commercial portfolio. Enhancements included quantification of both ultimate dollar loss and default probabilities, improved error rate computation, and the ability to flexibly define the data set for analysis.

**Financial Consultant – Management Sciences**

1984 – 1987

Provided internal consulting services in the areas of operations, branch configuration, market research, financial analysis and credit risk measurement.

- Developed a model for locating branches based on demographic, traffic, competitor and banking behavior data. Model was used to identify branch closure candidates following the merger with Security Pacific.
- Analyzed item processing volumes, clearing processes and airline schedules, and recommended alternatives that optimized float.
- Performed market research for Bank of America's first credit life insurance offering and for Charles Schwab's first on-line trading product.
- Assessed the usefulness of artificial intelligence applications in banking, with an emphasis on credit risk management. Published several articles in banking and artificial intelligence publications.

**EDUCATION**

University of Illinois at Chicago

Certificate in Nonprofit Management, 2004

University of California, Berkeley Extension

Certificate in Marketing, 2002 (Awarded with Distinction)

University of California, Los Angeles, CA

M.B.A., Anderson School of Management, 1984 (emphasis in finance and management sciences)

University of California, Berkeley, CA

B.S., Haas School of Business, 1982 (emphasis in procurement and production management)

B.A., Mathematics, 1982 (emphasis in pure mathematics)