Hi! Thanks for attending my presentation if you have any questions or follow up thoughts I'd love to hear them. Also if your organization, chapter or council might be interested in hearing an encore of Dashboards 101 or even a Dashboard workshop, I'd be happy to talk with you about it.

Regards, Alana (alanafd@yahoo.com, www.afdfacilityplanning.com, 215.219.9881)

DASHBOARDS 101

Presented by: Alana F. Dunoff

The youniversal Facility Management Experience

Oct. 7-9, 2009
Orlando, Florida, USA

DASHBOARDS 101:
For FM Practitioners

AFD FACILITY PLANNING

Alana F. Dunoff

October 8,2009

SYLLABUS

- History
- Benefits & Value
- Research & Precedent
- Create
- Case Studies

a control panel located under the windshield of an automobile.

source: "dashboard." Merriam-Webster Online Dictionary. 2009.

DEFINITION

It contains the instrumentation and controls pertaining to the operation of the vehicle.

source: "dashboard." Merriam-Webster Online Dictionary. 2009.

Dashboards provide information

DEFINITION

DEFINITION

A **Digital Dashboard Tool**

is a visual display of the most important information needed to achieve one or more objectives; consolidated and arranged on a single screen so the information can be monitored at a glance.

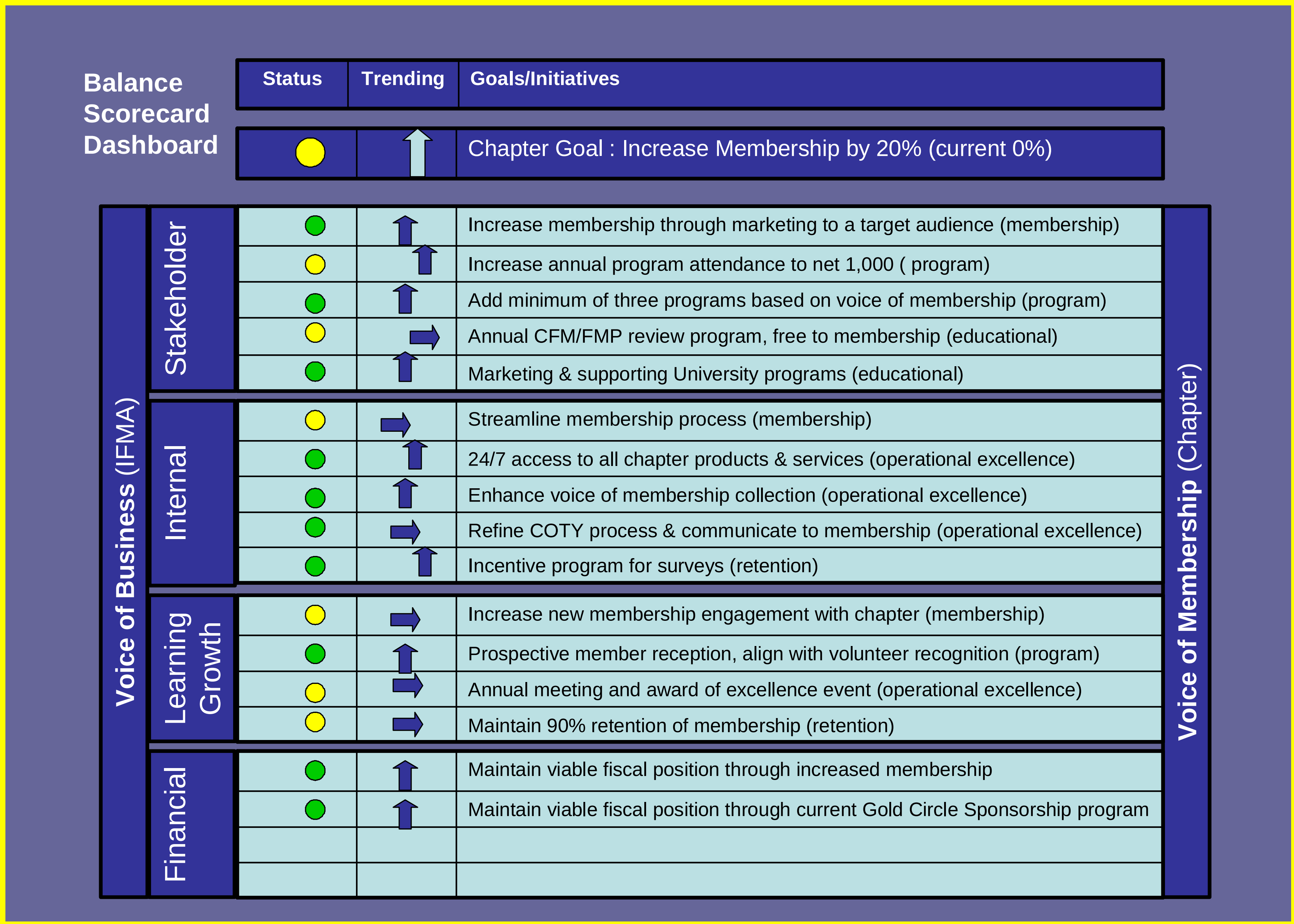
- *Stephen Few, 2004*

Furniture Company/Financial Client

Company Name: Dashboard

Perspective	Goal/Objective	Status	Key Metrics	Current Month	2007 YTD	Prior Year 2006 (Target)	Comments
PRODUCT							
	1. Provide highest value. Breakdown of product costs on a quarterly/annual basis.	● (green)	$ spent on product	$ 50,000	$ 247,000	$ 805,000	
		● (green)	$ spent on Attic stock	$ 10,000	$ 175,000	$ 235,000	Equates to 29% of Total Product
		● (red)	$ spent on shop work	$ 2,000	$ 9,000	$ 11,855	
		● (yellow)	$ spent on shipping	$ 2,000	$ 3,000	$ 4,745	
		● (green)	Value of product shipped	$ 50,000	$ 65,000	$ 99,300	Into PA
		● (green)	Value of product shopped	$ -	$ -	TBD	
		● (green)	$ cost to manage installed furniture base per crew member annually		$ 64	$ 66	
ACTIVITY							
	1. Ensure Efficient Processes: Track Labor and Service Financials (Binwork, SP, CARS requests, Projects)	● (green)	Warehouse	$ 83,000	$ 240,000	$ 332,000	
		● (green)	Design	$ 12,000	$ 420,000	$ 60,000	
		● (red)	Signage	$ 5,000	$ 78,000	$ 7,800	
		● (green)	Installation	$ 100,000	$ 600,000	$ 1,153,000	
		● (yellow)	Project Management	$ 6,000	$ 18,000	$ 22,000	
		● (green)	**Total Project**		$ 1,356,000	**$ 1,575,000**	
	2. Effectiveness of Work Environment 2.1 Track requests and related costs for Projects	● (red)	Number of Existing Stations		810	786	
		● (green)	Number of Revised Stations		543	859	
		● (green)	Completed Workstation Requests		189	173	Could be numerous tasks per each request
		● (green)	Cost for Workstation Requests		$ 876,000	$ 1,049,000	
	2.2 Track furniture reconfiguration as a part of overall churn rate	● (yellow)	Churn rate (company data)		65%	67%	IFMA Benchmark for Financial Svcs 42%
		● (yellow)	Reconfiguration rate (Workstation Reconfigs only)		8%	9%	# reconfig/ave # of w kst includes CWZ

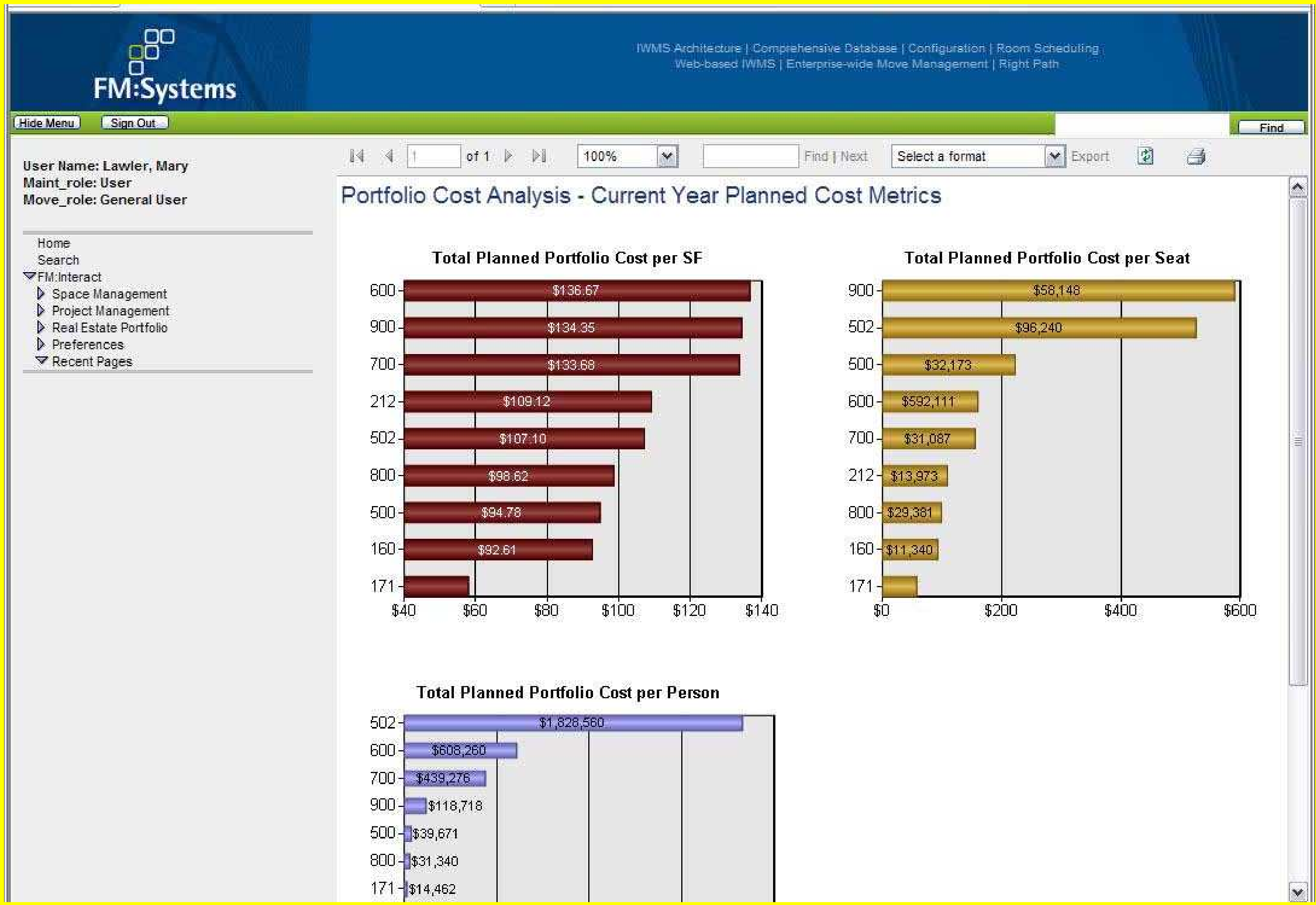
Source: Client of AFD Facility Planning



Source: Philadelphia Chapter of IFMA

Source: Website of Infomerrsion Incorporated, was acquired by Business Objectives

Source: idashboards.com



Source: FM Systems

Source: Vertical Response -AFD Facility Planning

HISTORY

- Who created the Dashboard?

HISTORY

Decision Support Systems (DSS)

- IT driven/focuses
- Computerized information systems that support business and organizational decision-making activities.
- An interactive software-based system intended to help decision makers compile useful information to identify and solve problems and make decisions.

source wikipedia "Decision Support Systems"

HISTORY

Decision Support System Evolution

1950's – 60's (CIT) theoretical studies of organizational decision making

1960's (MIT) -

1980s DSS improve effectiveness of managerial and professional activities

1987 Texas

1990's Microsoft promoted a concept known as the Digital Nervous System and "digital dashboards" were born

Today, with growth of web-based analytical applications– "Business Intelligent tools" gained increased popularity

Date	Flight	DepApt	ArrApt	DepTime	ArrTime	ACType	Distance
4/1/2008	AAL348	DFW	PHL	21:04	0:00	MD82/L	1129
4/1/2008	RPA3295	BDL	PHL	22:56	0:02	E170/Q	169
4/1/2008	NWA1770	DTW	PHL	22:49	0:05	DC93/W	392
4/1/2008	SWA1055	STL	PHL	22:18	0:07	B737/L	704
4/1/2008	USA1458	FLL	PHL	21:27	0:06	B734/J	863
4/1/2008	RPA3395	RIC	PHL	23:12	0:08	E170/Q	172
4/1/2008	AWI4066	MKE	PHL	22:17	0:08	CRJ2/L	597
4/1/2008	USA1928	RSW	PHL	21:38	0:09	B733/J	863
4/1/2008	AWI3581	PWM	PHL	22:57	0:13	CRJ2/L	316
4/1/2008	USA1888	MSY	PHL	21:46	0:13	A319/L	944
4/1/2008	USA722	CLT	PHL	23:03	0:14	A319/L	389
4/1/2008	UAL376	ORD	PHL	22:45	0:16	A319/Q	587
4/1/2008	AAL1022	MIA	PHL	21:59	0:20	B738/Q	881

I could have presented the information like this…ZZZZ

ecision Support System Evolution

HISTORY

- 1950's – 60's (CIT) - the theoretical studies of organizational decision making
- Late 1960's (MIT) - the technical work on interactive computer systems
- In the 1980s DSS systems began using technology to improve effectiveness of managerial and professional activities in the form of Executive Information Systems (EIS)
  - In 1987 Texas Instruments development the Gate Assignment Display System for United Airlines
- In the 1990's data warehousing and on-linen analytical processing broadened the realm
- In the last decade Web-based analytical applications were designed to consolidate and display data already gathered in various information systems throughout the organization

TODAY

Dashboards: Business Intelligent (BI) Tools

- Provide decision makers with input to "drive" business
- Applicable to all types of functions and processes
- Stand alone software, web browser based, desk top application
- Success depends on goals/objectives and metrics
- More then summary reports, “living” documents
- Turn data into actionable knowledge

TODAY

Dashboards Are Not

The all in compassing,
comprehensive, definitive,
business tool to end all tools

TODAY

Dashboards Are

A great concise, real time and visual method of displaying information.

And with information all in one place they can help you make actionable decisions.


DOGBERT CONSULTS
YOU NEED A DASH-BOARD APPLICATION TO TRACK YOUR KEY METRICS.
THAT WAY YOU'LL HAVE MORE DATA TO IGNORE WHEN YOU MAKE YOUR DECISIONS BASED ON COMPANY POLITICS.
WILL THE DATA BE ACCURATE?
OKAY, LET'S PRETEND THAT MATTERS.
www.dilbert.com
© Scott Adams, Inc./Dist. by UFS, Inc.

BENEFITS

- Why Create Dashboards?

BENEFITS

What's In It For You?

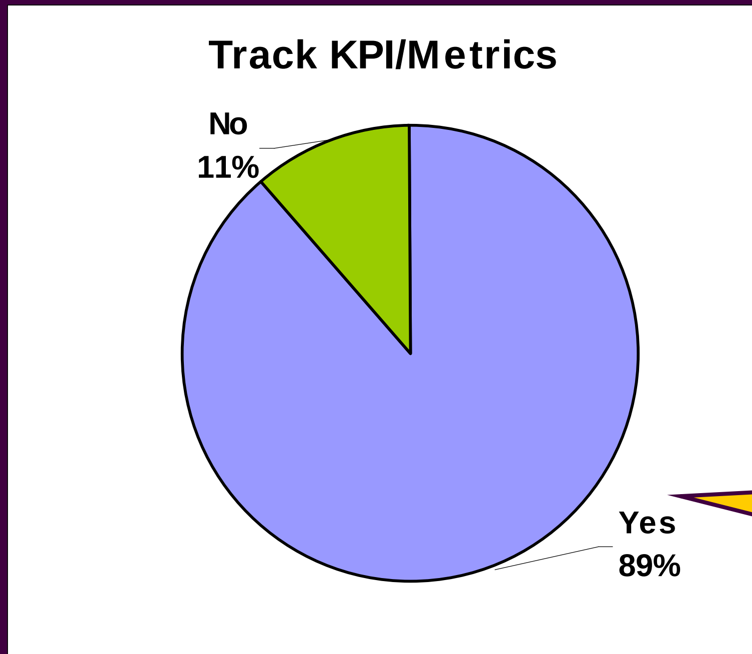
1. Ability to make informed decisions based on collected business intelligence
2. Align strategies and organizational goals
3. Language of Senior Management
4. Manage expectations and projects
5. Team tool that keeps everyone organized and focused
6. Greater individual focus & accountability
7. Measure efficiencies/inefficiencies
8. Ability to identify and correct negative trends
9. Ability show new trends
10. Visual presentation of performance measures
11. Can streamline reporting process (take less time)
12. Use all that data you have and collect

PRECEDENT

- Are FMs Utilizing Dashboards?

YES

PRECEDENT

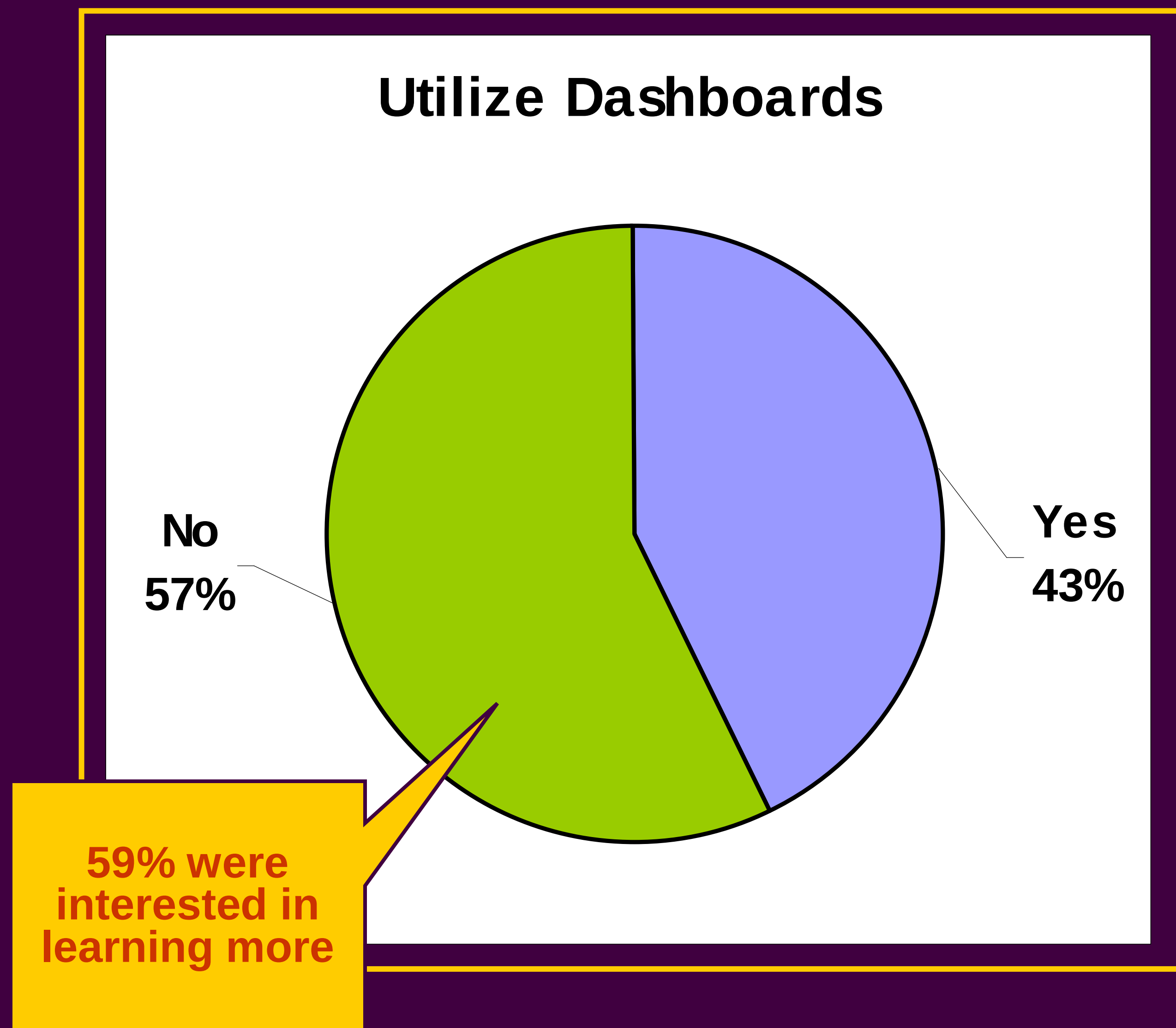


Great News

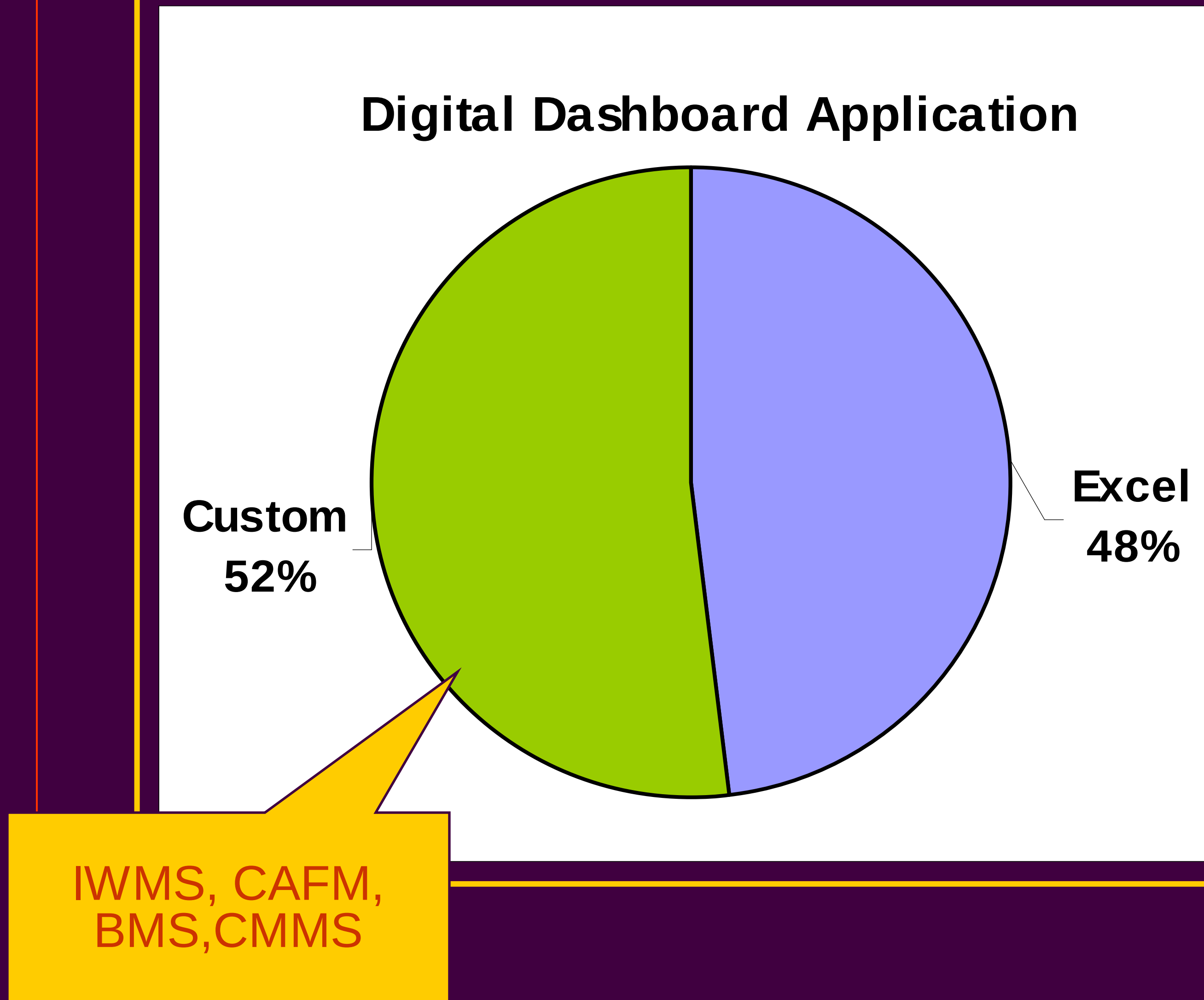
Survey results from 90 FM practitioners nationwide

Primary KPI/Metric Categories Tracked	
15%	Project Costs (e.g. Design, Construction, Installations)
14%	Cost/SF (e.g. Maintenance, Operations, overall Facilities)
12%	SF/Person
11%	Response Times (e.g. Project or Work Order Cycles)
10 %	Space Utilization/Efficiency
10%	Service Provider Efficiency (e.g. Costs, Products, Timeliness)
10%	Churn/Occupancy/Move Rates
9%	Costs/Person (e.g. Furniture, Space, Moves)
8%	Labor Costs

PRECEDENT


Utilize Dashboards
No
57%
Yes
43%
59% were interested in learning more

PRECEDENT



Digital Dashboard Application
Custom
52%
Excel
48%
IWMS, CAFM,
BMS,CMMS

PRECEDENT

In Their Words

- “Dashboards are a great way of getting a good pulse check on how well what you are measuring is performing. I have found that in order to be effective the measurements must be both objective and subjective. But as always must be achievable. And with any data, "garbage in...garbage out" so it must have data integrity….”
- ‘Great idea and one that should help FM's "promote" the important achievements through metrics and simple dashboard displays. Will also create more awareness of measured/displayed metrics and potentially positively impact them.”
- ‘They are a great tool to manage with....cannot imagine working without it. I use it every day!”

CREATE

How to Create a Dashboard

CREATE

10 Tips for a Great Dashboard

1. Clear, concise and well organized
2. Simple
3. Easily used
4. Ability to share
5. Appropriate level of complexity
6. Specific for the task
7. Good, smart data
8. Actionable information
9. Allows for evaluation/analysis
10. Relevant measures

CREATE

Strategic Process

- Define purpose, goal or objective
  - Identify type: department/team, individual, strategic, tactical, project based
  - What do you want to manage, tackle, solve?
- Define tasks/activities
  - What needs to be done to successful realize goal/objectives
- Define metric/measures
  - How will you know success?

CREATE

Types of Measures/Metrics

■ The same measure at the same point in time in the past	Oct 8, 2007 vs. 2008 vs. 2009
■ The same measure as some other point in time in the past	Oct 8, 2009 vs. Dec 31, 2008
■ A current target	Budget of $1.34 Million
■ A prediction	Forecast – 3% staffing growth
■ Measurement norm or benchmark	Industry average - $3.55/pp

CREATE

DASHBOARD 101

for FM Professionals

IFMA World Work Place Oct 8, 2009 Session 3.12

Name: ______

Get started with creating a simple dashboard for your organization by defining the following:

1 **Goals/Objectives:** **I would like to focus on the following big idea, process, issue or project:**

Reduce churn

2 **Tasks/Activities:** **Here are 2 activities that need to be completed or monitored to reach the above goal/objective:**

Occupancy/vacancy analysis

Track/count number of box moves YTD

3 **Measures:** **I can use the following metric/milestone to measure the success of these tasks/activities:**

Completion date

Churn rate (Benchmark)

CREATE

Strategic Process

- Define purpose, goal, objectives
- Define tasks/activities
- Define metric/measures
- Define resources
  - Who/what will help you?
- Define the benefit
  - What people will derive value?
  - What other intrinsic value will this provide?

CREATE

DASHBOARD 101

for FM Professionals

IFMA World Work Place Oct 8, 2009 Session 3.12

4 **Resources: These people could help me create, manage, provide input for these tasks/activities:**

Stacy Planner

Ed CAD

5 **Benefits: The following people would benefit from seeing the progress of this goal/objective:**

CFO (my boss)

Benefit – can draft a plan to better manage churn once understand data

CREATE

Strategic Process

- Define purpose, goal, objectives
- Define tasks, activities
- Define metric/measures
- Define resources
- Define the benefit
- **Define the components**
  - What are the critical comprehensive elements?
  - Simple to complex
  - Identify the right graphics/illustrations

CREATE

Typical Components

- Strategic Goals & Objectives
- Perspective or department function
- Tasks/Activities
- Priorities
- Metrics/Measures
- Milestones
- Targets
- Budgets/Costs
- Project completions/dates
- Status bar (graphic representation)
- Percent Complete
- Champion
- Trends
- Remarks/Information

Anatomy of a Dashboard

Company name

Your name

Clearly define your visual key and meaning

WORKING DASHBOARD

10/8/2009

Primary: ____________________

Key:

- **G** Item is moving forward as planned, no issues
- **Y** Item is 'on hold' or has some identified delay or explained circumstance
- **R** Item is stopped or not progressing, needs to be discussed, needs resources

Use both the color and % to indicate work completion

Who is accountable for the success (opt: resource)

3-5 primary goals/ objectives that remain relatively constant

The activities that need to be completed or monitored to achieve goal. Might have multiple tasks for each goal. Can define priorities (low, med, high)

Define date metric or target to focus on success

Relevant information or notes to be tracked

Status/ % Comp	Champ	Goal/Objective	Activity/Task-Priority	Measure/ Milestone	Information
		Reduce churn	Occupancy/vacancy analysis	12/31/09	
	SP	Reduce churn	Track/count number of box moves YTD	Churn %	FM Benchmark.com

EXAMPLES

- Case Studies & Examples

fresh artists
empowering young lives through art

revised as of 9/21/2009

Chair: Alana F. Dunoff

Tactical Board Dashboard October Board Meeting 2009

Status	Objectives/Priorities	Measure for Success	% Achieved	Champion	Comments
	1. Finalize draft operations manual for Program Oriented activities -Low	Draft due Nov 18	70%	AFD	Finalizing and refining.
COMP	2. Review new art supply delivery process - High	Website going live Oct 10th.	100%	AFD/BAC	New art kits have been developed, teachers will choose when they register
	3. Teacher Registration Process to begin Oct 15th - High	Website going live Oct 10th.	80%	AFD/BAC	Finalize web information
	4.Board Roles & Responsibilities Document - Med	November Board MTG	40%	DFB/AFD	Board Responsibilites-waiting review
	5. ED Agreement Letter - High	October Board MTG	20%	AFD/DBF/HG	

I'll be doing this on the plane home

COMPANY NAME

10/8/2009

G	On target
Y	Caution
R	red flag issue

HQ OPERATIONS DASHBOARD

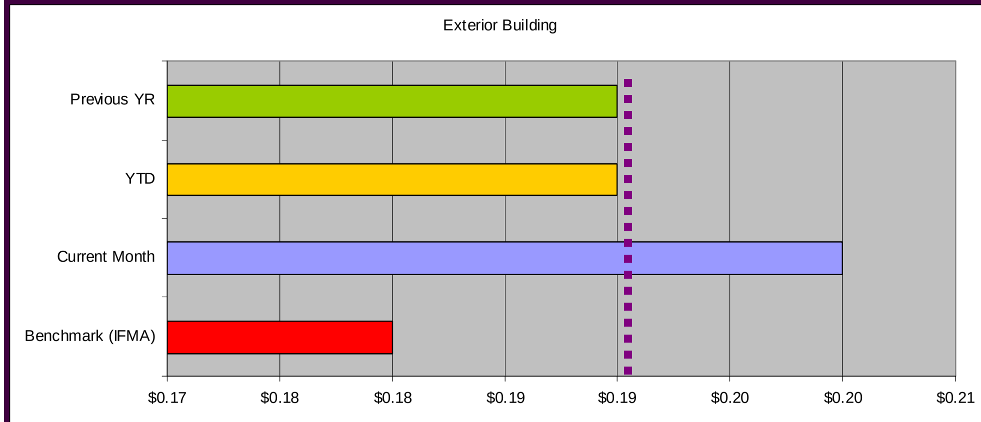
Goal: Manage and Reduce Operational Expenses

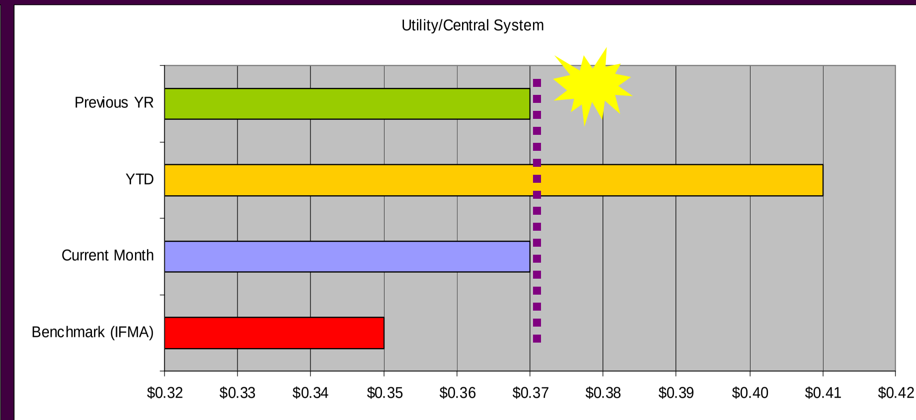
Primary: ____________________

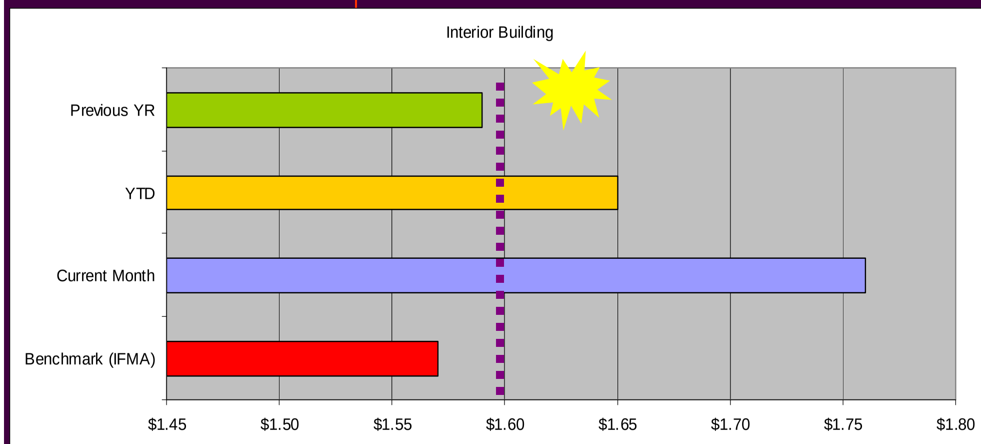
Your data

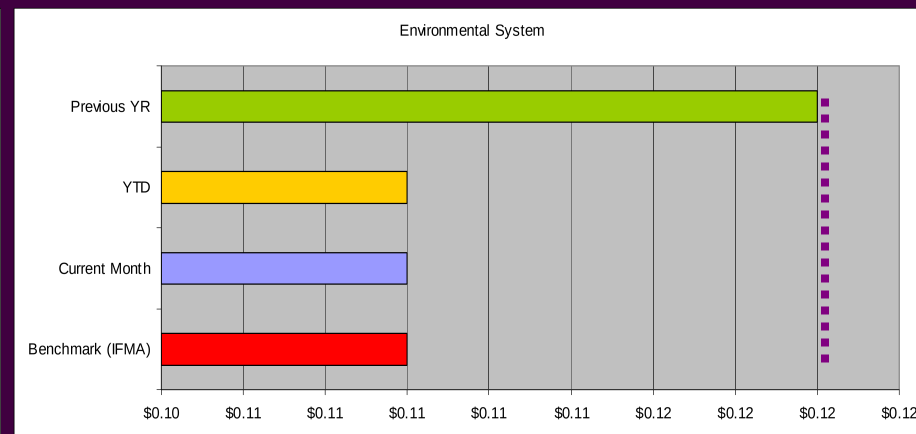
Status	Function	Metric to Track	Benchmark (IFMA)	October GSF	YTD GSF	Previous YR GSF	Information
	Janitorial						
		Total Janitorial Costs	$1.23/GSF	$1.45	$1.20	$1.29	Bldg Y ; project cleanup
		Labor Costs	68% total JC $				
		Supply Costs	17% total JC $				
	Maintenance						
		Total Maintenance Costs	$2.76/GSF	$2.94	$2.89	$2.65	
		Exterior Building	$0.18	$0.20	$0.19	$0.19	
		Interior Building	$1.57	$1.76	$1.65	$1.59	Bldg Y ; project
		Road & Grounds	$0.55	$0.50	$0.53	$0.55	
		Utility/Central System	$0.35	$0.37	$0.41	$0.37	
		Environmental System	$0.11	$0.11	$0.11	$0.12	
	Utility						
		Total Utility Costs	$2.13/GSF				
		Electricty	$1.68				
		Oil	$0.03				
		Natural Gas	$0.36				
		Chilled Water	$0.29				
		Stream	$0.50				
		Water	$0.12				
		Sewer	$0.07				

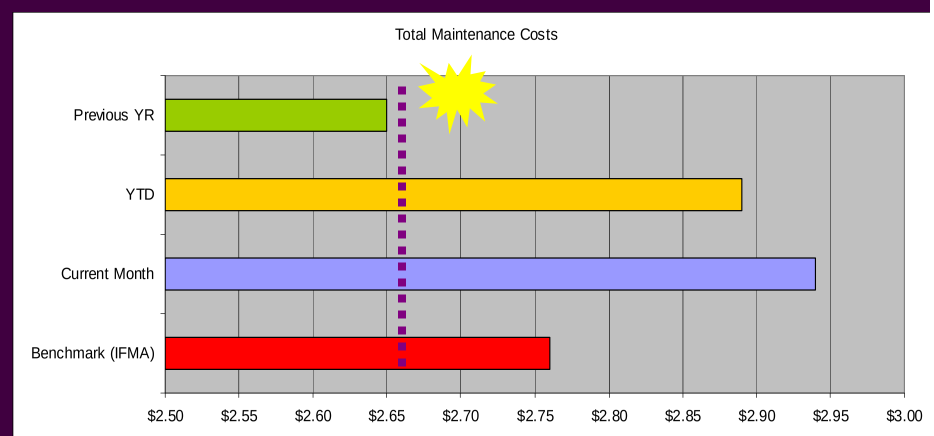
HQ Operational Dashboard











Non-Profit Example

Company Name

revised on *9/1/2009*
Primary: NG

key:

(green)	Item is moving forward as planned, no issues
(yellow)	Item is 'on hold' or has some identified delay
(red)	Item is stopped or not progressing, needs to be discussed, needs resources…

Tactical Dashboard 2009: OPERATIONS

Status/% Comp	Champion	Goal/Objective	Task/Priority	Milestone/Measure of Success	Comments/Notes
80%	NG	Goal: Organizational Effectiveness	Create SOP manual	Complete by 10/10/09	Waiting for information
20%	NG	Goal: Organizational Effectiveness	Create new electronic file system	Complete by 12/31/09	
40%	NG	Goal: Reduce expenses	Review supply purchases	5% reduction by June 2010	Need to consider new vendor (RFP)
30%	NG	Goal: Reduce expenses	Clarify reimbursable expense policy	5% reduction by June 2010	Refine what we will reimburse, need input from Board

Non-Profit Example

Your Company

revised on *9/1/2009*
Primary: TEAM

key:

	Item is moving forward as planned, no issues
	Item is 'on hold' or has some identified delay
	Item is stopped or not progressing, needs to be discussed, needs resources

Tactical Dashboard 2009: TEAM SUMMARY

Status/% Comp	Champion	Department	Primary Goal(s)	Milestone/Measure of Success	Summary/Remarks
	NG	Operations	Goal: Organizational Effectiveness	12/31/2009	SOP Manual, Electronic files
	NG	Operations	Goal: Reduce Expense	5% reduction by 6/10	Supply vendor RFP; Reimbursable Policy
		Finance			
		Communications & Marketing			
		Sponsorship			
		Management, Development, Board			
		Programs & Webinar			
		Volunteer Coord & Admin			
		IT			
		Grants & Educ Program			
		Event Planning & Meet ups			

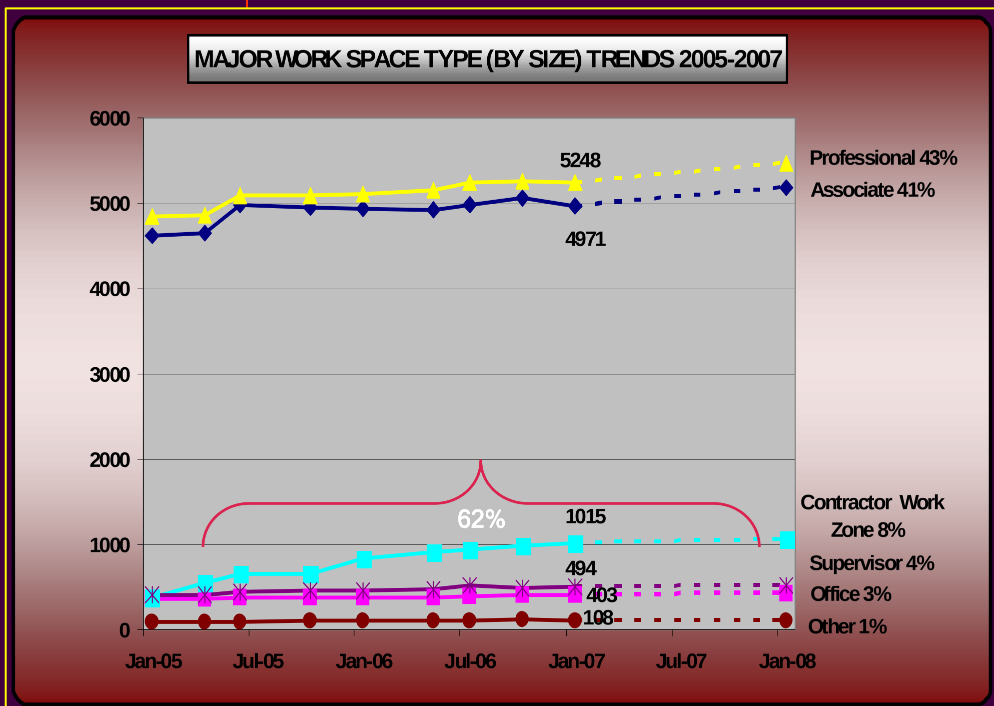
Furniture Dealer/Financial Company (FM)

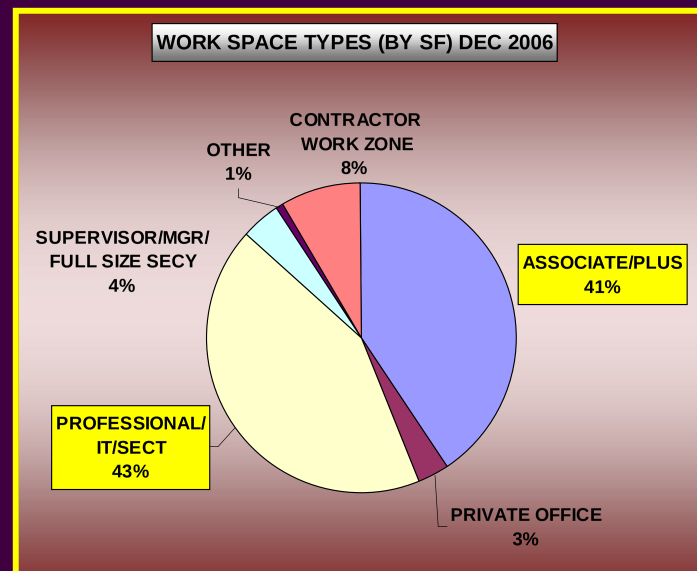
47 slides in one quarterly report

Furniture Dealer/Financial Company (FM)

Work Space Type (by Size) Trends:

- More Professional than Associate work spaces
- Proportional growth for most space types except for Contractor Work Zones. CWZ's increased 62% (633 spaces, since 2005).





Furniture Dealer/Financial Company (FM)

Company Name: Dashboard							
Perspective	Goal/Objective	Status	Key Metrics	Current Month	2007 YTD	Prior Year 2006 (Target)	Comments
PRODUCT							
	1. Provide highest value. Breakdown of product costs on a quarterly/annual basis.	●	$ spent on product	$ 50,000	$ 247,000	$ 805,000	
		●	$ spent on Attic stock	$ 10,000	$ 175,000	$ 235,000	Equates to 29% of Total Product
		●	$ spent on shop work	$ 2,000	$ 9,000	$ 11,855	
		●	$ spent on shipping	$ 2,000	$ 3,000	$ 4,745	
		●	Value of product shipped	$ 50,000	$ 65,000	$ 99,300	Into PA
		●	Value of product shopped	$ -	$ -	TBD	
		●	$ cost to manage installed furniture base per crew member annually		$ 64	$ 66	
ACTIVITY							
	1. Ensure Efficient Processes: Track Labor and Service Financials (Binwork, SP, CARS requests, Projects)	●	Warehouse	$ 83,000	$ 240,000	$ 332,000	
		●	Design	$ 12,000	$ 420,000	$ 60,000	
		●	Signage	$ 5,000	$ 78,000	$ 7,800	
		●	Installation	$ 100,000	$ 600,000	$ 1,153,000	
		●	Project Management	$ 6,000	$ 18,000	$ 22,000	
		●	**Total Project**		$ 1,356,000	**$ 1,575,000**	
	2. Effectiveness of Work Environment 2.1 Track requests and related costs for Projects	●	Number of Existing Stations		810	786	
		●	Number of Revised Stations		543	859	
		●	Completed Workstation Requests		189	173	Could be numerous tasks per each request
		●	Cost for Workstation Requests		$ 876,000	$ 1,049,000	
	2.2 Track furniture reconfiguration as a part of overall churn rate	●	Churn rate (company data)		65%	67%	IFMA Benchmark for Financial Svcs 42%
		●	Reconfiguration rate (Workstation Reconfigs only)		8%	9%	# reconfig/ave # of w kst includes CWZ

Balance Scorecard Dashboard

		Status	Trending	Goals/Initiatives
		🟡	↑	Chapter Goal : Increase Membership by 20% (current 0%)
Voice of Business (IFMA)	Stakeholder	🟢	↑	Increase membership through marketing to a target audience (membership)
		🟡	↑	Increase annual program attendance to net 1,000 (program)
		🟢	↑	Add minimum of three programs based on voice of membership (program)
		🟡	→	Annual CFM/FMP review program, free to membership (educational)
		🟢	↑	Marketing & supporting University programs (educational)
	Internal	🟡	→	Streamline membership process (membership)
		🟢	↑	24/7 access to all chapter products & services (operational excellence)
		🟢	↑	Enhance voice of membership collection (operational excellence)
		🟢	→	Refine COTY process & communicate to membership (operational excellence)
		🟢	↑	Incentive program for surveys (retention)
	Learning Growth	🟡	→	Increase new membership engagement with chapter (membership)
		🟢	↑	Prospective member reception, align with volunteer recognition (program)
		🟡	→	Annual meeting and award of excellence event (operational excellence)
		🟡	→	Maintain 90% retention of membership (retention)
	Financial	🟢	↑	Maintain viable fiscal position through increased membership
		🟢	↑	Maintain viable fiscal position through current Gold Circle Sponsorship program

Voice of Membership (Chapter)

Source: Philadelphia Chapter of IFMA

AFD DASHBOARD FOR PEW: FACILITY PLANNING PROJECTS IMPLEMENTATION PHASE B

1/28/2009

Project	Status/% Comp	Current Milestone	Comments	Next Steps
A1. FM Tracking System	100%	FacilityRequest-PHL will go live Feb 1, 2009. A communication regarding the new protocol will go out to Pew staff via Pew Direct on the same date.	Developing a new proposal for evaluation of an alternate FM request/work order system	March/April 2009 will revisit status of Track It system and being evaluation of alternate software systems.
A2. Emergency Evacuation Process	67%	ICE Poster for DC/PHL have been completed. Drafted "Fire Marshal invitation" for Cheryl to update PHL list		Further DC Emergency Plans to be handled by building management. Project will continue Mid/End of March 2009
A3. FM Best Practices & Metrics	17%	Tracking "buckets" created as part of FM Request System for DC/PHL	Created draft list of FM Metrics to be tracked and developed.	Further refinement of metrics and reporting, requires input/protocol reinforcement from FM Staff and developing survey tool(s). Connected to Project A1 progress. Will continue project in March/April 2009
A4. Business Card Ordering	45%	Waiting for approval to go forward. 1/15/09 According to SH process/policy being rethought responsibility of project may shift.	Have recommended number of Temp Business Cards for DC as well as pricing options from printer (SCS)	Possible future step is the development of an RFP for a new printer vendor. Including automating the business card process and development of a Printers "Standard" package. AFD has not submitted a proposal for this project phase.
A5. PA Clean Air Act	100%	Project Complete	Pew is in compliance, Completed memo to be placed in Employee Manual. Waiting for final from Legal	Sue would like to review copy prior to final distribution.
B1. FM Shared File System	0%	n/a	Will begin March/April 2009	n/a

** % complete based on invoice dated Jan 30, 2009*

CREATE

Strategic Process

- Define purpose, goal, objectives
- Define task/activities
- Define metric/measures
- Define resources
- Define the benefit
- Define the components
- Communication
  - Frequency of update and distribution
- Identify Application
  - How will you physically develop it?

CREATE

Resources

Customized

- iDashboard
- LogiXML
- Corda
- Crystal Reports (Visual Advantage)
- Excel

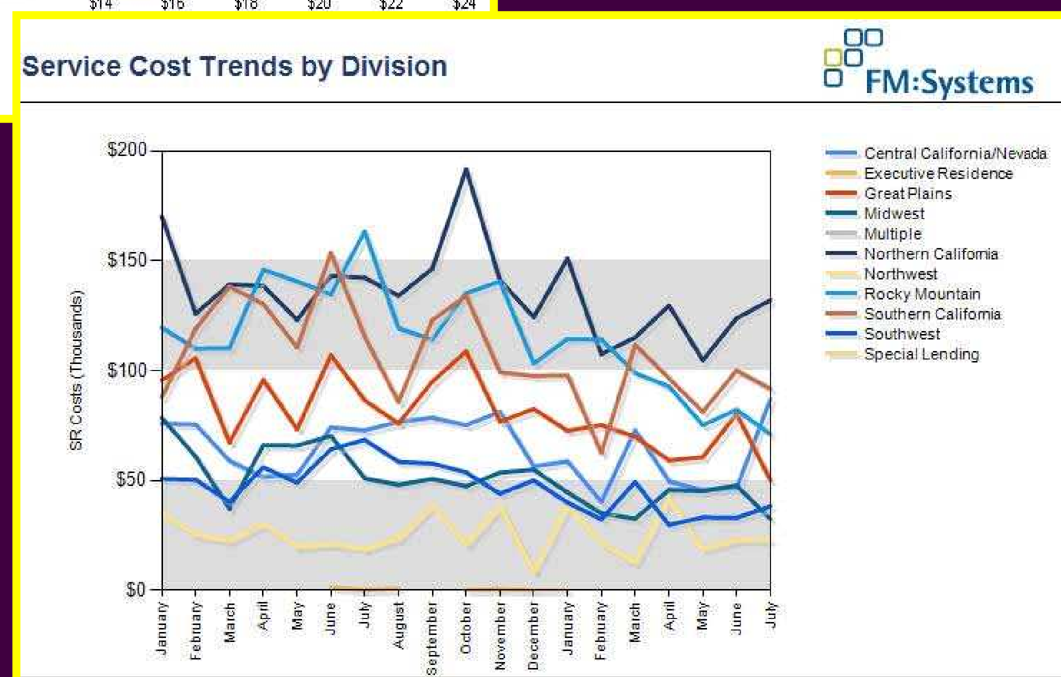
Integrated

- Archibus
- FM Systems
- Maximo
- Tririga 9
- Sightlines
- Vision

Other

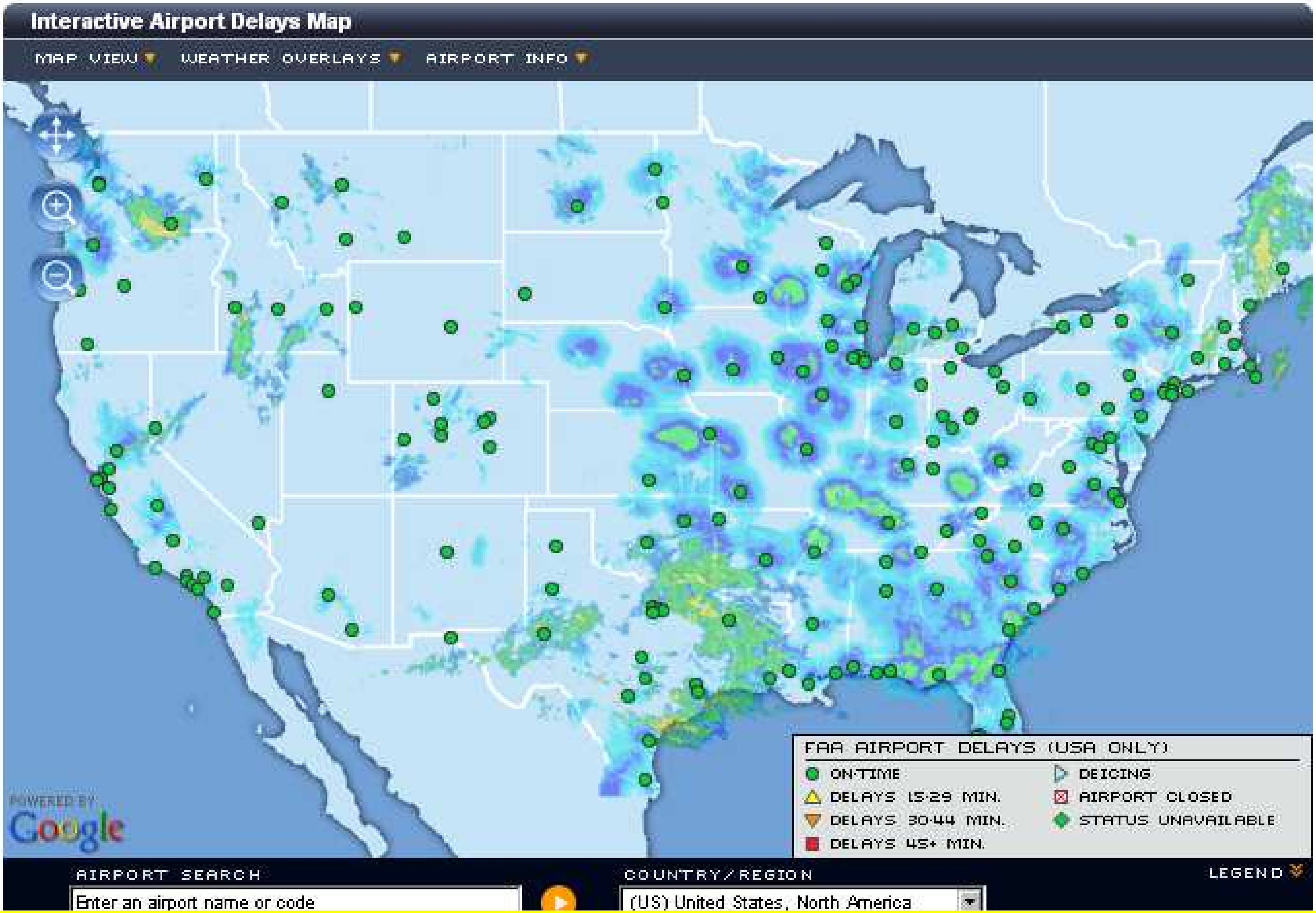
- Perceptual Edge (Visual Business Intelligence)
- IFMA Benchmarking
- FMBenchmarking.com

Graphical Dashboard Reporting



Source: FM Systems

Source: idashboards.com



Source: Flightstatus.com

WRAP UP

Questions?

WRAP UP

Dashboards

- Require good data (bad news is good too)
- Turns data into actionable knowledge
- Commitment to be used
- Team effort (development & utilization)
- Continuum of simple to complex
- Be creative
- Keep it simple and concise
- Challenge your daily process
- Try a pilot

CLASS DISMISSED!

THANK YOU

Feel free to leave a card and I'll send you the presentation

Alana F. Dunoff

E: alanafd@yahoo.com P:215.219.9881 W: www.afdfacilityplanning.com

ABOUT ME

Alana F. Dunoff

Strategic facility planner for over 17 years

Education:
- M.S. in Facility Planning and Management from Cornell University
- B.S in Environmental Psychology from Boston University.

Experience:
- *Space Planning Analyst,* Thomas Jefferson University & Hospital
- *Strategic Planner* ,Pesce Associates, specializing in healthcare Merger and Master Planning.
- *Project Manager,* Little & Associates Architects
- *Design Principal*, Little & Associates Architects
- *President,* AFD Facility Planning launched in 2002 clients include Dechert LLP; PJM Interconnection; Spectrum: A Herman Miller Dealer; KlingmanWilliams; Alita Pharmaceuticals; The School District of Philadelphia; AccessGroup Inc.; NELSON (E*TRADE, Wachovia); The Pew Charitable Trusts, National Foundation for Celiac Awareness, Burlington Coat Factory
- *Adjunct Professor*, Moore College of Art & Design, lectured numerous other programs and conferences

Professional:
- President of the Philadelphia Chapter of IFMA 2001
- Director on the Board of Directors for IFMA 2003-2005
- Board of Trustees of Fresh Artists