

**PORTFOLIO**

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## STATEMENT OF QUALIFICATIONS

### Experience Summary

Lawrence Medina has 24 years' experience managing successful nonprofits serving urban, rural, and frontier communities. He has also brought expertise in program design and development, fiscal management, strategic planning, marketing, and continuous quality improvement, to many programs as a consultant. Mr. Medina led an award-winning organization, Concerned Parents of Pueblo that received the "National Family Volunteer Day Award" by the Points of Light Foundation in Washington, DC in 2001. He has served on many boards and advisory committees including the Con Alma Health Foundation and Recovery Communities of New Mexico Advisory Committee. Currently, Mr. Medina is serving a four-year term with the Substance Abuse and Mental Health Services Administration's (SAMHSA) Center for Substance Abuse Treatment (CSAT) National Advisory Council out of Rockville, Maryland. Mr. Medina holds a Bachelor's degree in Business Administration and a MBA from the University of Phoenix.

### Business Administration

Board of Directors: A chartered board member of four nonprofit organizations, Mr. Medina has participated in strategic planning efforts to identify the direction of newly-formed organizations. He possesses expertise in board development training, ensuring that board members understand their fiduciary responsibilities and the importance of participation of raising capital for the organization.

Executive Director/Senior Management: Mr. Medina has demonstrated strong leadership skills in managing complex and dynamic organizations. His experience includes serving as an executive director of several different organizations. Mr. Medina's supervisory experience includes recruiting, hiring, evaluating, and terminating staff within organizations with up to 50 employees. He has an extensive background in developing and maintaining relationships with stakeholders and organization's partners using cooperative arrangements. Mr. Medina has been responsible for investing organization's funds and managing associated risks, supervising cash management activities, and executing capital-raising strategies that supported the organization's expansion.

Fiscal Management: Mr. Medina has a strong track record of sound fiscal stewardship, taking responsible care of resources entrusted to the organization. He has developed and implemented a full range of fiscal policies and procedures, ensuring compliance with federal, state, and local regulations and audit readiness. He has worked closely with board of directors in budget development and management. Mr. Medina has also developed annual reports which have included an outline of the organization's operations, its partners, and its financial position.

### **Strategic Planning and Implementation**

**Facilitation:** Mr. Medina has lead participatory strategic planning sessions, retreats, and annual board meetings to evaluate and create organizational goals and objectives. He has conducted numerous SWOT analysis/environmental scans that assess internal strengths and weaknesses; and identify external threats and opportunities. He creates action plans that are based on sound, systematic business planning practices.

**Strategic Planning:** Mr. Medina has written comprehensive business plans for organizations that identify business strategies which provide basic direction to meet short and long-term goals and objectives. He experienced in financial projections and assumptions that accurately identify organizations' financial needs. Mr. Medina's other areas of planning expertise includes developing startup costs, defining personnel planning strategies, writing cost controls, and performing organizational evaluations.

**Marketing:** Mr. Medina produces focused, strategic marketing plans that incorporate low-cost methods for informing the public about an organization's mission, services, and strengths. He conducts market analysis research projects that allow organizations to understand their target markets. Mr. Medina has extensive experience facilitating communication assessments for organizations and enhancing and developing communication materials that accurately target the organization's key audiences. His expertise includes media relations, ranging from paid advertising to writing public service announcements, press releases, and special interest stories.

### **Nonprofit Sector Management**

**Resource Development and Fundraising:** Mr. Medina has developed and supervised direct mail, major gift campaigns, targeted-donor solicitations, in-kind donation requests, and annual giving campaigns. He has written numerous grants, securing in excess of \$12 million in funding from both private and public funding sources in a ten (10) year period. Mr. Medina has written resource development and fundraising plans that succinctly outline strategies for securing funding for organizations by diversifying their funding sources. His experience with software applications for donor management such as *Sage Fundraising* (formerly *Paradigm*) and *Exceed! Basic* have allowed organizations to effectively perform fundraising activities while building a comprehensive database that allows for accurate planning of future fundraising activities. Mr. Medina has planned and organized numerous cultivation gatherings and events that are effective for both fundraising and marketing applications.

**Program Design and Development:** Mr. Medina has designed and developed programs and services that are highly integrated with an organization's mission, strategic planning goals, and needs of clients. He has written numerous program proposals for submittal to grantors and has conducted a large number of program evaluations. Mr. Medina has administered a variety of different evidence-based modalities related to health and human services model programs.

**Organizational Development:** Mr. Medina possesses strong expertise in conducting organizational assessments that identify areas of capacity that are strong and those that need improvement. He has a keen ability for developing corrective action plans and recommendations that remedy problem areas identified during assessments. He has provided training to both board members and staff, increasing their core skills and capabilities, ultimately resulting in enhanced organizational effectiveness and sustainability.

**Education**

***Master of Business Administration/Marketing, 2006***  
University of Phoenix, Albuquerque, New Mexico

***Bachelor of Science, Business Administration, 2004***  
University of Phoenix, Colorado Springs, Colorado

***Associates of Applied Science, Marketing and Management, 1995***  
Aims Community College, Greeley, Colorado

***Ducktorate Degree, Marketing & Advanced Studies in Hospitality Management, Class of 1989***  
Walt Disney World's College Program, Orlando, Florida

**Additional Training**

- Juvenile Detention Alternatives Initiative Training, Santa Cruz, CA, 2004
- Federal Bureau of Prisons Community Corrections Training, Santa Fe, NM, 2003 & 2004
- Colorado Nonprofit & Management Program, Community Resource Center, Denver, CO, 2003
- Leadership Pueblo, Greater Pueblo Chamber of Commerce, Pueblo, CO, Class of 1999
- National Community Organizer Symposium, NRC, Boston, MA, 1997
- Neighborhood Reinvestment Training Institute, Oakland, CA, 1995
  - Developing Grassroots Leaders
  - Grant Proposal Writing

**Awards**

- ❖ Marketing Superman, Santa Fe County Youth Development Program, Cornell Co., Santa Fe, NM, 2004
- ❖ Volunteer of the Year, Greater Pueblo Chamber of Commerce, Pueblo, CO, 2001
- ❖ Certificate of Appreciation, Board of Pueblo County Commissioners, Pueblo, CO, 2001
- ❖ National Family Volunteer Day Award, Points of Light Foundation, Washington, DC, 2001
- ❖ Nominee, Citizen of the Year, Greater Pueblo Chamber of Commerce, Pueblo, CO, 2000
- ❖ Classroom Consultant, Junior Achievement, Pueblo, CO 1999-2000
- ❖ Campaign Coordinator, United Way, Pueblo, CO, 1999 to 2002
- ❖ Parade Theme Committee, Colorado State Fair Parade, Pueblo, CO, 1996
- ❖ Most Improved Speaker Award, Toastmasters International- Club 784, Greeley, CO, 1994
- ❖ Best Idea, Redesign of the Adventureland Veranda in Magic Kingdom, Walt Disney World, Orlando, FL, 1989

**Technological Skills**

Advanced knowledge in *Microsoft Word, Excel, Access, Outlook, PowerPoint, Publisher, Project, Paint, WordPerfect, ACT 6, Sage Fundraising* (formerly *Paradigm*), *Exceed! Basic*, *Adobe Acrobat, StyleEase* (*APA style*).

## Professional Experience

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### President and CEO

[Zia Community Services, Inc.](#)

2005 to Present

Ranchos de Taos, New Mexico

Provides consultation services to nonprofit organizations, government entities, and small businesses in the area of organizational development, capacity building, strategic planning, marketing, facilitation of multi-agency collaborations, stakeholder involvement, board and staff development, executive coaching, teambuilding, process improvement, project management, and training design & delivery.

Specializes in resource development via grant writing, fundraising, Medicaid and commercial insurance credentialing (includes NPI and CAQH creation, validation, and maintenance), setup claims submission and billing systems, HR, policy and procedure development and review according to industry standards, quality improvement and assurance programs, marketing, community development, financial management, and outcome-based evaluations. Have consulted with over 60 organizations in Colorado and New Mexico. Below are examples of past consultation projects:

- **Family Justice Center, Inc., Lead Consultant**, Organizational development and capacity building for a new nonprofit including obtaining nonprofit status (1023 IRS Application), built financial management system, strategic plan, business plan, resource development planning, wrote fiscal, HR, and programmatic policies and procedures, executive coaching, grant writing and secured funding for operations that included State (CYFD) and Federal (OVW) funding (2006-2009)
- **NM Dept. of Transportation, Traffic Safety Department, Contractor**, organizational development and capacity building services for state and federal funded programs such as Click IT or Ticket, and Community DWI. Technical writing of policies and procedures & marketing materials, and developed internal audit tools to ensure federal compliance. One year project (2008)
- **San Miguel County Detention Center, Strategic Planner**, developed a comprehensive (\$8.9 million Capital Outlay) 5-year Strategic Plan (and update), conducted a jail assessment (SWOT) following ACA standards, and developed communication material to Federal and State officials (2006-2008)
- **San Miguel County Detention Center, Strategic Planner**, completed a \$1.4 million /five year Community-Based Adult Reintegration Center Business Plan. facilitation of a participatory process with Commissioners, Staff, and Citizen's Advisory Committee, program design and development, market analysis, budget development for capital outlay, start up and operations capital (2008-2009)
- **San Miguel County, Strategic Planner**, completed a \$1.9 million /five year Information Technology Plan that included all 15 County Department. A SWOT Analysis was conducted to identify internal strengths and weaknesses and external opportunities and threats. Specific standards were developed for each department as well as a comprehensive transition plan (2009)
- **City of Santa Fe, Strategic Planning**, Completed a Graffiti Abatement Strategic Plan for the City wanting to address the problem of graffiti that is affecting an internationally recognized art community. Plan included a SWOT Analysis, an analysis of City ordinances and compared to national best practices, identified critical issues, and an Action Plan (2013)

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### Executive Director

Interfaith LEAP, Inc. dba Sangre de Cristo House

(2015 to 2016) & (2018 to Present)

Peña Blanca, New Mexico

Reporting to the Board of Directors and responsible for the design, development, and startup of a young women's integrated substance abuse treatment for a 20 beds transitional living program opened in the summer of 2015. Secured funding, developed core programs, operations, and a business plan to expand into a new market. Medicaid and commercial insurance(s) credentialing, contracting and billing. Ensure a rigorous program evaluation and consistent quality of finance and administration, fundraising, communications, and systems. Oversee day-to-day operations of 20 employees for a 24 hour/7 day program.

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**Executive Director  
Rio Grande Alcoholism Treatment Program, Inc.****(2009 to 2014) & (2018 to Present)  
Taos, New Mexico**

Responsible for planning, organizational development, strategic planning, overall management and oversight of all agency operations for outpatient substance abuse treatment. Supervise three offices: Taos, Las Vegas, and Embudo. Medicaid and commercial insurance(s) credentialing, contracting and billing. Ensure compliance with contractual conditions and funding source requirements through timely submission of all financial and programmatic reports to funding sources. Direct oversight of policy and procedure development and implementation with regards to fiscal, clinical, operation, continuous quality improvement, and HR. Conduct community outreach, public relations, and marketing. Supervised from 15 to 20 employees.

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**Senior Development Officer  
National Dance Institute of New Mexico****2004 to 2005  
Santa Fe, New Mexico**

Responsible for strategizing and initiating an overall development/fundraising plan for Albuquerque program that included special events, direct mail, personal donor solicitations, grant writing, and cultivation events. Oversaw the provision of external constituency-building. Maintained and updated all records for fundraising on *Sage Fundraising* (formerly *Paradigm*) database. Produced annual cultivation events; organized and galvanized fundraising committee, created marketing materials, developed and managed budgets. Worked closely with individual donors, foundations, and government entities in efforts to build and maintain relationships for funding purposes.

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**Marketing & Quality Assurance Specialist  
Santa Fe County Youth Development Program****2003 to 2004  
Santa Fe, New Mexico**

Senior management team member of a 128-bed secure juvenile facility. Developed initial marketing plan and set strategic goals; responsible for developing communications materials, fostering relationships with current accounts to increase referrals, and initiating calls to top accounts. Also researched new leads, negotiated and secured contracts; wrote responses to federal agency's Requests for Proposals.

Quality Assurance/ACA Accreditation Manager duties include understanding and applying corrections best practices and standards for the Detention Center and Training School (dual accreditation) via ACA, National Commission on Correctional Health Care, CYFD's Juvenile Detention Facility, and application of the Federal Bureau of Prison's Statement of Work. Also ensured the center complied with national standards by conducting internal audits, policy and procedure review and development, organizing and maintaining internal controls and documentation, and establishing clearly-defined procedural system that all staff could apply. Provided supervision as a senior manager for up to 50 employees.

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**Lyle Alzado Youth Home Coordinator  
Pueblo Youth Service Bureau, Inc.****2002 to 2003  
Pueblo, Colorado**

Responsible for the operations of a 13-bed residential treatment center (RTC); applied RTC licensing requirements (state and federal standards); recruited, interviewed, trained, supervised, and evaluated 10-15 staff members; coordinated and monitored all psycho-educational, individual therapy, and sex offender treatment programs and outcomes; collaborated with community social service professionals for planning and executing of individual treatment plans; conducted internal audits to ensure organization remained in compliance with state and federal standards; managed the quality assurance program for treatment services, including documentation; created audit tools and budget and inventory management procedures.

**Executive Director****1998 to 2002****\*Concerned Parents of Pueblo, Inc.****Pueblo, Colorado**

Reported directly to the Board of Directors. Was responsible for all business and operations of the nonprofit organization including 1,000 youth/adult volunteers and over 50 collaborating agencies managing more than 19,000 hours of volunteer work per year; managed the operations of removal of over 2,000 graffiti sites annually; coordination of over five major community pride mural projects annually; oversaw fiscal management in accordance with Generally Accepted Accounting Principles; responsible for resource development through grant writing (public & private sectors) and fund-raising; community and economic development; designed, implemented, provided training for, and managed the prevention and intervention programs; developed and implemented business, marketing, and strategic plans; performed project management; administered outcome-based evaluations on programs; participated in civic events, public speaking; developed media releases, statistical and interest stories.

**Community Coordinator****1999 to 2001****\*Big Brothers Big Sisters of Colorado, Inc.****Pueblo, Colorado**

Established a satellite office for a youth mentoring program and was responsible for general direction of the operations; supervised, trained, and evaluated one case manager and over 20 volunteers; developed a marketing plan for recruitment of mentors, volunteers, and potential donors; performed case management, grant writing, fund-raising, and public relations; oversaw fiscal management; completed monthly progress reports for submission to funding sources.

**Assistant Manager****1999 to 2001****\*Cars Helping Kids, Inc.****Pueblo, Colorado**

Established an auto donation program in order to raise funds to support the Big Brothers, Big Sisters mentoring program in Pueblo; was responsible for developing and implementing a marketing plan that included massive advertising campaign and public relations; managed the vehicle registration paperwork and logistics of towing more than 200 donated vehicles a year.

**Community Organizer****1995 to 1998****Neighborhood Housing Services, Inc.****Pueblo, Colorado**

Performed grassroots community organizing; assisted the executive director with program development and implementation and management of homeownership initiatives; lead citizen engagement and political advocacy efforts around issues such as affordable housing and equitable community development; chaired the Community Relations Committee; managed “community pride” projects such as mural projects and painting senior citizens homes; coordinated over 500 volunteers a year; wrote grants for submittal to state, federal, and private funding sources; lead annual fundraising campaign; strategic planning, developed annual reports, and marketing/public relations.

*\*Managed three organization together as listed above: Concerned Parents of Pueblo, Big Brothers, and Cars Helping Kids*

## Local, State, National Involvement

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- [National Advisory Council, SAMHSA, Center for Substance Abuse Treatment National Advisory Council](#), Rockville, Maryland, *April 2016 to Present*
  - [Northern New Mexico Citizens Advisory Board Member](#) (community advisory group chartered to provide citizen input to the U.S. Department of Energy's Site & Facility Restoration and Waste Management, Los Alamos National Lab, Los Alamos, NM, *July 2017 to July 2018*)
  - Co-Created & Leader, 1<sup>st</sup> Annual Taos County Substance Abuse Summit/Recovery-Friendly Taos County/Recovery Community Organization, (<http://rfnm.org/>), Taos, NM, *October 2011 to Present*
  - Chair, [Recovery Communities of New Mexico](#), NM Behavioral Health Service Division, Executive Planning & Implementation Committee, Taos, NM, *June 2012 to June 2016*
  - Past Chair & Current Member, New Mexico Substance Abuse Prevention and Treatment (SABG) Block Grant Independent Peer Review Committee, Taos, NM, *January 2010 to Present*
  - Community Advisory Committee, Con Alma Health Foundation, Santa Fe, NM, 2009 to 2014 -Finance Committee, Development Committee, and Outreach Committee
  - Steering Committee Member, Art & Entertainment Center, Albuquerque, NM, 2006
  - Volunteer Youth Director, Faith-Based, Fire for the Nations, Y2Y Connection, Pueblo, CO, *2002-03*
  - Organizer, Pueblo's Youth & Family Issues Workshops, Pueblo, CO, *1998 to 2002*
  - Co-Chair, Pueblo County United Way, Marketing Committee, Pueblo, CO, *2000 to 2002*
  - Co-Chair, Pueblo Youth Employment Council, Work Investment Act, Pueblo, CO, *2000 to 2002*
  - Chartered Board Member/Officer, Tennis Mania for Youth, Pueblo, CO, *1999 to 2003*
  - Advisory Committee Member, Family-Nurse Partnership, Pueblo, CO, *2000 to 2002*
  - Member, Pueblo County United Way, Compliance Committee, Pueblo, CO, *2001 to 2002*
  - Ad Hoc Committee, 2010 Healthy Pueblo Task Force, Human Investment Plan, Pueblo, CO, *2001-02*
  - Resident Member, Hyde Park Neighborhood Association, Pueblo, CO, *2000 to 2003*
  - Steering Committee, El Pomar Foundation/Bridging the Gap Program, Pueblo, CO, *2001 to 2002*
  - Member, Council for Children & Youth/Youth Issues Committee, Pueblo, CO, *2001 to 2002*
  - Committee Member, Pueblo Police Department/Tech. Block Grant, Pueblo, CO, *1998 to 2001*
  - Chair, 2010 Healthy Pueblo Task Force, Pueblo, CO, Pueblo, CO, *2001*
  - Advisory Committee Member, 1<sup>st</sup> Annual Teen Summit, Pueblo, CO, *June 2000*
  - Classroom Volunteer, Junior Achievement of Southern Colorado, Pueblo, CO, *1999-2000*
  - Mentor/Big Brother, Big Brothers Big Sisters of Colorado, Pueblo, CO, *2000 to 2003*
  - Advisory Committee Member, HUD's Empowerment Zone Strategic Plan, Pueblo, CO, *1998*
  - Co-Chair, Leadership 21 (Youth Leadership Training Program), Pueblo, CO, *June 1998*
  - Chartered Board Member, Recycled Technology for Ed. Foundation, Pueblo, CO, *1996-97*
  - Volunteer in the field of intervention with alcoholics and drug addicts, *1993 to present*
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