

**Name:** Lee, Patricia

**Address:** P O Box 357685, Gainesville, 32605

**Email:** pj718@hotmail.com

**Board Name:** Equity Advisory Council

**Primary Phone:**

3524598331

**Please list any civic and professional accomplishments/honors, training or experience related to this appointment::**

ACSWCD Supervisor; Training in Equity, Diversity & Inclusion; Served on LSSC Equity Committee

**Please list any current/previous Advisory Board appointments:**

City of Gainesville Development Review Board; Previously on Alachua County Economic Development Advisory Board

**What Contributions do you feel you could make if you were selected to this board?:**

Can bring personal and professional experience that will enhance the work of the board

**Please Agree with the following statements:**

**I understand this application is the property of Alachua County and subject to public records laws. I hereby certify that the statements made on this application are true and correct. I understand that Appointees to advisory board/committees are required to attend scheduled meetings as specified in the "Guidelines for Citizen Advisory Boards and Committees". I understand that some boards and committees require Financial Disclosure (Chapter 112, Florida Statutes) and I am willing to file if required. I affirm that my personal and business (if applicable) affairs within Alachua County are in substantial compliance with all county regulatory and taxing authorities rules and regulations?:**

Yes

**Time of Submission:** 09/20/23 6:55:51 AM

**Attachments:**

- Pat Resume 0518.pdf

## Patricia J. Lee

352.459.8331

pj718@hotmail.com

4126 NW 34<sup>th</sup> Drive Gainesville, FL 32605

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### SUMMARY OF PROFESSIONAL EXPERIENCE

#### **EDUCATION & LICENSES Held (Past & Present)**

**MBA** Management, accounting concentration

Southern Methodist University Dallas, TX

**B.S.** Business Education

Bethune-Cookman University Daytona Bch, FL

Real Estate Series 7 General Securities Representative

Mortgage Brokers Series 66 Registered Investment Adviser

Series 31 National Commodities/Managed Futures

Insurance: Life, Health, & Annuities Teaching Certificate

Certified Florida Workforce Professional

#### **CONSULTING & ENTREPRENEURSHIP**

- Provide consulting/analytical and/or grant writing services to companies, non-profits & professionals
- Guide the development & implementation of strategic and tactical plans for business and non-profits
- Enhance product and service offerings as well as organizational management activities
- Contract negotiation, modifications, and management
- Workforce Development (Florida Certified Workforce Professional)

#### **REAL ESTATE AND INVESTMENT PRODUCTS SALES & ADVISORY SERVICES**

- Find real estate solutions for clients looking to buy, sell, or lease land, residential or commercial property
- Advise clients on investments, financial and retirement planning and monitor client portfolios
- Counsel clients on investment opportunities, while keeping abreast of the real estate and financial markets

#### **FISCAL MANAGEMENT**

- Write and implement policies and procedures conforming to GAAP and internal control standards
- Develop and prepare business plans, budgets, financial statements and management reports
- Prepare periodic variance analysis, bank reconciliations, credit analysis, and cash management reports
- Direct accounts receivable & accounts payable and/or prepare payroll and tax returns
- Provide services for expatriates, including expatriate tax equalization policy and tax returns

#### **ADMINISTRATIVE MANAGEMENT**

- Executive Director with proven, successful grant writing, funding & project management experience
- Develop and/or analyze financial, human resources, and organizational policies and procedures
- Facilitate the purchase, lease, and/or assignment of office space, furniture, equipment, and services

#### **TRAINING & DEVELOPMENT**

- Facilitate/manage group discussion and/or Lead and evaluate seminars on accounting and finance for nonfinancial managers, entrepreneurship, customer service, business English, communications, leadership, diversity, quality, grant writing, sales & marketing, community development, and community relations
- Develop and lead workshops; and, employ effective evaluation methods to determine the impact of training

#### **SYNOPSIS: EMPLOYMENT, CLIENTS, VOLUNTEER SERVICE AND RESIDENCY LOCATIONS**

- **Companies:** Lockheed Martin(Martin-Marietta), Texas Instruments, Chevron (Gulf Oil), Cigna, Pittsburgh National Bank, Sprint, BCN Associates, Inc., Morgan Stanley Smith Barney, Prudential, AIG AGLA, Davidson & Keller
- **Education:** Houston Community College, Santa Fe College, Alachua County Schools, Bidwell Training Center, and Levy County Schools
- **Major Non-Profits:** Employment-Red Cross, East Gainesville Development Corporation, City of Alachua, Big Brothers Big Sisters, and Community Development Corporation of Leesburg & Vicinity  
Volunteer-Habitat for Humanity, March of Dimes, UNCF, Pleasant Place, F Crittenden Home San Francisco, Big Brother Big Sister and United Way
- **Locations:** Alachua, Gainesville, Miami, Daytona Beach, Orlando, Jacksonville, and Leesburg, **FL**; Dallas and Houston, **TX**; Columbus, **OH**; San Francisco, **CA**; Atlanta, **GA**; Pittsburgh & Harrisburg Area, **PA**; Johnson City & Bristol, **TN/VA**; and Raleigh, **NC**

*Significant transferable leadership skills for consulting, teaching, grant writing, and management, including sales, marketing, and public relations.  
Life-long learner with excellent creative, interpersonal, oral, and written communication skills; highly proficient PC and Microsoft Office skills.*

## DETAILED EMPLOYMENT HISTORY

**Realtor ®.** 07/17 – Present. Keller Williams-Gainesville Realty Partners. Find real estate solutions for clients looking to buy, sell, or lease land, residential or commercial property. Provide information and perpetual service to bolster client's enjoyment of current and future properties. Continuously provide competent, committed, caring service that values people first.

**Realtor ®.** 08/16 – 06/17. Davidson Realty, Inc. St. Augustine, FL. Find real estate solutions for clients looking to buy, sell, or lease land, residential or commercial property. Provide information and perpetual service to bolster client's enjoyment of current and future properties. Continuously provide competent, committed, caring service that values people first.

**Consultant/Entrepreneur/Trainer.** 10/11 – Present. Provide wide array of on- and off-site consulting and assistance to new or emerging entrepreneurs, and non-profits including training, business plan development, fiscal management, sales and marketing, public relations, grant writing, individual and business tax preparation, and project planning and implementation.

**Agent.** 08/12 – 08/13. American General. Hired by the Ocala, FL office as a commission-based agent for the company's insurance, annuities and other financial protection products designed to help clients grow and protect their wealth. Employ numerous strategies to continually identify and present to the middle-market while provide continuing, customer service and counsel to existing clients.

**Executive Director.** 10/10 – 09/11. Community Development Corporation of Leesburg & Vicinity. Leesburg, FL. Manage all corporate functions of the CDC; Supervise volunteers and staff performance, development, and training; Plan and execute events, including monthly board meetings, strategic planning and budgeting, and board awareness and development; maintain policies & procedures; identify and engage in contractual relationships with service providers; build community relationships and collaborative efforts to position the organization for providing a larger array of services and enhance its ability to secure significant grants and other funding to diversify its revenue stream; coordinate board committee activities and engage in any other activity that help the organization “*build communities...improve lives.*”

**Financial Services Associate.** 07/09 – 09/10 Prudential Financial. Hired by the Gulf Atlantic Agency, Jacksonville, FL to sell insurance and investment products to help clients grow and protect their wealth, especially retirement assets. Employed numerous strategies to continually identify and sign high net worth clients and provide continuing, customer service and counsel to identify and re-position portfolios in response to changes in client lives and in the economic and regulatory environment at the federal, state, and local levels.

**Financial Advisor.** 06/08 – 07/09 Morgan Stanley Smith Barney, Gainesville, FL. Obtained Series 7, 66, 31 and insurance licenses to work as a sales professional in the Global Wealth Management Division. Created and employed strategies to attract and sign high net worth clients; Create and advise clients on financial plans utilizing knowledge of tax and investment strategies, securities, insurance, pension plans, and real estate. Analyzed clients' assets, liabilities, cash flow, insurance coverage, tax status, and financial objectives to establish suitable winning, investment strategies.

**Grants Specialist.** 07/07 – 01/08. City of Alachua, FL. Served as lead grant writer and facilitator of the Affordable Housing, Elder Readiness, and Citizens Advisory Task Force Committees. Managed special projects; handled citizen complaints; and coordinated public relations efforts, provided analysis and recommendations for improving the performance of the City of Alachua Transportation System (CATS). Assisted the department Director in securing grants and other funding identified in a Five-Year Master Grant Funding Strategy. Provided contract administration for grant award agreements from a variety of funding agencies and jurisdictions. Researched potential grant funding opportunities, prepared, and wrote grant proposals. Developed a grant funding source spread sheet to aid grants management and prepared both program and financial reports to ensure compliance. Monitored grant budgets and reconciled grant expenses in concert with the Finance Department; attended committee meetings and public hearings after business hours and presented action items to the Alachua City Commission.

**Management Consultant & Executive Director.** 12/01 – 05/07. BCN Associates, Inc. Served as Executive Director for East Gainesville Development Corporation (EGDC) for whom BCN was Administrative Agent. Managed accounting and

## **EXPERIENCE** (cont'd)

writing of financial policies and procedures; also, monitored/audited service providers and programs for contractual and regulatory compliance. Duties also included managing staff and volunteers regarding all projects and all corporate functions of the board, to include, representing the organization before funders, governmental entities and in the media, grant writing, trainer/facilitator of company run workshops and seminars, providing support on special projects. Created and manage a micro-loan and entrepreneurial training program as well as provided technical assistance and consultation to existing and emerging small business entities. Also served as management consultant to the Alachua/Bradford Workforce Board (became a **Florida Certified Workforce Professional**) most notably serving the Better Jobs/Better Wages and First Job/First Wages Committees as well as grant writing, project implementation and management, marketing and other assignments as necessary. Grant writing yielded nearly \$6 million in resources to serve local workforce board and EGDC initiatives.

**Project Director.** 07/00 – 06/01. Santa Fe Community College **Upward Bound Program**. Gainesville, FL. Responsible for operational and fiscal management of the program. Accountabilities as follows:

- Comply with Federal regulations and financial requirements of the Upward Bound (UB) grant.
- Recruit, select, train, supervise, and evaluate staff to accomplish project objectives.
- Provide professional development activities for the Upward Bound staff.
- Manage participant recruitment, application and intake processes.
- Act as liaison with target schools, community organizations and government agencies (all levels).
- Coordinate the integration of program functions with other college departments and personnel.
- Work with staff and college faculty to design, implement and evaluate curriculum, tutoring services, counseling, mentoring services, cultural and recreational activities for UB program participants.
- Prepare a detailed annual budget; monitor and maintain accurate records of program expenditures.
- Supervise the collection of evaluation data and all performance records; submit performance reports.
- Act as liaison for participants with postsecondary institutions and perform follow-up services.

**Community Service Volunteer.** Lifelong.

- Active volunteer for a number of community service projects.
- Former Board Chair for **Pleasant Place, Inc.** Pleasant Place responsibilities include grant writing; formulating policy and procedures; ensuring compliance with HUD grant guidelines; compliance with DCAF & other agency licensing or contract requirements; fundraising; addressing resident and staff issues; evaluating the executive director; and board development.
- **Prior years** community service has included working on grants for various projects, mentoring, tutorial and college visitation programs for under served youth; elder affairs, fundraising for public service television stations and community radio; and working with national public service entities such as Big Brothers Big Sisters, United Way, Red Cross, March of Dimes, United Negro College Fund, Florence Crittenton, and Habitat for Humanity. **Knowledge and skills gained** or enhanced include sales, marketing and public relations; HR (recruiting and evaluating staff and volunteers); strategic planning, budgeting and accounting; purchasing; contract negotiation, analysis and compliance.

**Business Teacher.** 09/98 – 05/00. Levy County School Board/Williston Middle School. Williston, FL.

Taught exploratory business classes including introduction to computers & career exploration

- Chartered Williston Middle School Chapter of Future Business Leaders of America and served as advisor. Guided students through successful fundraising projects; solicitation of support from the business community; state leadership conference participation; and school and community service projects.

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### **EXPERIENCE** (cont'd)

***Substitute Teacher/Entrepreneur.*** 09/97 – 08/98. Alachua County School Board. Gainesville, FL.

- Worked in middle and high schools in most subject areas.
- Used business skills to provide consulting services to small businesses, prospective entrepreneurs and provided tax preparation services for individuals and small businesses.

***Regional Office Manager.*** 09/96 – 09/97. Wireless One. Gainesville, FL. Responsibilities:

- Manage administrative operations and human resources while minimizing related cost; utilized skills in Windows, MS Word, Excel, Access, Publisher and PowerPoint
- Provide quality customer service; track and report installations, sales, and subscriber cash
- Handle bank deposits and operating accounts, petty cash, account reconciliations, accounts payable and payroll; also reviewed the work of system office managers handling these responsibilities for system offices in the tri-state area (FL, GA, AL)
- Serve as local personnel/benefits rep including interviewing, new employee orientation, exit interviews, and explaining benefit information; unemployment compensation matters; EEO, OSHA, Workmen's Comp, safety certification and/or compliance, including preparing, distributing, and/or maintaining governmental reports
- Maintain data on the Region's vehicle fleet (leases, licenses, maintenance, insurance & gas cards)
- Prepare and communicate changes in policies and procedures
- Train, direct and/or evaluate the work of subordinates and others; re-distribute workloads as necessary
- Provide support to the Regional Manager and System General Managers and their Staff
- Maintain strong working relationship with corporate staff and amiable resolution of issues and conflicts
- Plan, communicate and coordinate activities for Regional Meetings
- Facilitate the purchase of goods and services including building leases, permits, licenses, contractors, office furniture and supplies within budget guidelines
- Successfully handled all non-technical matters required to get new system or regional office ready for occupancy prior to scheduled openings increased efficiency by creating or improving methods, office forms, procedures, communication, coupled with creative suggestions for other areas

***Accountant/Billing Supervisor.*** 02/90 – 09/95. Sprint/United Telephone, Harrisburg, PA; Johnson City, TN; Raleigh, NC

- Managed the customer billing function including miscellaneous billings and closing activities
- Maintained and provided timely, accurate financial and statistical data for closing and financial reporting
- Maintained and provided timely, accurate financial and statistical data for closing and financial reporting
- Prepared employee development and performance plans and evaluated employee performance
- Handled HR and training matters including applicant interviewing and college recruiting
- Provided leadership and support on special projects
- Earlier positions included accountant, accounting coordinator and staff accounting analyst

***Business Education Instructor,*** Information Science Div. 01/88 – 02/90. Bidwell Training Center, Inc. Pittsburgh, PA.

- Taught keyboarding and business communications (incorporating activities for building a high competency level in office practice and related professional skills)
- Administered assessment tests, prepared or enhanced class syllabus and wrote lesson plans to address serious competency deficiencies. Also provided counsel, assistance and advice on preparing resumes and formal letters, appropriate business and business casual attire, employer expectations goal setting, problem solving, personal issues, and pursuing higher education opportunities

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### **EXPERIENCE** (cont'd)

***Cash Management Associate.*** 04/87 – 01/88. Pittsburgh National Bank. Pittsburgh, PA.

- Performed credit analysis, wrote and presented cash management proposals as part of a cash management rep and loan officer training program

***Tax Analyst, Sr. Accountant, Asst. Director Expatriate Tax Dept, Accounting Coordinator &***

***Staff Analyst, and Accountant.*** 07/79 – 07/86. Chevron Corporation (Merged with original employer, Gulf Oil Corporation, in 1985).

- A series of promotions and job relocations with this company took me from Houston, TX to Columbus, OH, back to Houston, TX and finally to San Francisco, CA
- Responsibilities included management accounting, budgeting and planning, financial projections and analysis, internal reporting, corporate and expatriate taxation, supervising and training staff, duty drawback claims, writing policies and procedures. Supervised as many as 12 salaried and hourly employees

***Adjunct Instructor.*** 1978 – 1981. Houston Community College.

- Taught business courses part-time including introduction to business, introduction to accounting, taxation, business English, business communications and marketing.

***Administrator & Financial Analyst.*** 1973 – 1977. Texas Instruments, Inc.

- Prepared budgets, schedules, forecasts, and other management reports
- Tracked actual performance, analyzed results and prepared presentations for senior managers
- Assisted with HR/personnel issues for project employees and evaluated the work of a secretary

***Statistician.*** 1972 – 1973. Martin-Marietta Corporation. Orlando, FL.

- Collected, recorded, and reported on data related to the SAM-D missile project in support of engineers, management, and governmental agencies

### **REFERENCES**

Available upon request