

VOLUNTEER APPLICATION

Karen Dunbar

12/26/2023 4:00 PM

Application: **HC - Housing Catalyst**

Applicant Information

Birthday: [REDACTED] Gender: Female Education Level: Bachelors degree

Address: [REDACTED] Phone: [REDACTED] <<

Volunteer Groups Applied For

Housing Catalyst

Job Description

I have read the job description

Questions

Which Council District do you live in? Please refer to the map at: <https://gisweb.fcgov.com/HTML5Viewer/Index.html?Viewer=FCMaps&layerTheme=Council%20Districts> 6

I acknowledge I am available when the Housing Catalyst meets: 3rd Thursday of each month at 7:30 a.m. YES

Current Occupation: CPA, fundraiser for higher education -

Current Employer: 2016 - current Colorado State University

Prior work experience (please include dates): 1993 - 2016 Colorado State University Foundation. VP, Treasurer

Volunteer experience (please include dates): 1984 - present American Institute of CPAs
1984 - present Colorado Society of CPAs
2023 - present Housing Catalyst Audit/ Finance Committee and attendance at monthly board meetings
Other professional organizations related to higher education fundraising

Are you currently serving on a City board or Commission? If so, which one? No

Why do you want to become a member of this particular board or commission?
I would like to be a part of the Housing Catalyst because of the mission of providing affordable housing to our community. Our community is enriched because of Housing Catalyst provides sustainable, long-term and affordable housing opportunities. I am particularly impressed by the efforts exhibited toward improving the lives of all individuals by additional services geared toward stabilizing families, individuals with disabilities, children and seniors. The comprehensive nature of this organization has a mission that I care deeply about.

Have you already had any formal public housing authority commissioners NO



training? (This is not a requirement)

Have you had any exposure to the board or commission you are applying for? If yes, please explain:

Yes;
During most of 2023, I've been a member of the Audit and Finance Committee at the Housing Catalyst.

Specify any activities which might create a serious conflict of interest if you are appointed:

I don't believe I have any conflicts.

Are you willing to complete the required training if appointed?

YES

How did you learn of a vacancy on this board or commission?

Other (please specify);
By serving on the Audit/Finance Committee of the Housing Catalyst.

Karen L. Dunbar, CPA

• Fort Collins • CO • 80521 •

Objective **My skillset with financial accounting and strong fiduciary management matters has served me well throughout many years of working in highly regulated, accountable and visible industries. I have learned that an ideal position for me is to use that same skill set in assisting others to realize and recognize their passion for giving. I have successfully directed millions of dollars toward CSU throughout my 31 years of service.**

Employment

Colorado State University (CSU)

Fort Collins, Colorado

- 2016 – present – Associate Vice President, Gift Planning
Responsible for managing all gift planning functions for CSU. With a staff of four, we manage all revocable gift commitments, close all charitable gift annuities, meet with legal counsel, tax counsel, financial advisors and others as needed to successfully close gifts on behalf of CSU. My skillset with gift transactions has allowed me to negotiate and close multiple eight-figure cash gifts with donors throughout the years, and frankly I get a kick out of being involved and helping in this way. We have robust marketing efforts and an extremely successful program and it's an absolute passion of mine to help people realize their passions as they align with the needs of CSU.

Colorado State University Foundation (CSUF)

Fort Collins, Colorado

- 1993 – 2016 – Chief Financial Officer
Responsibilities included sound fiduciary controls and fiscal management of CSUF assets (in excess of \$500,000,000), investment manager review and asset allocation management. Serve as Corporate Secretary/Treasurer for Board of Directors. Specifically responsible for annual audit, budget preparation and oversight, personnel issues, estate collections, benefit plans, and supervising staff of 11. Throughout these 23 years, served as primary liaison with regard to all planned gifts. Report directly to CSUF President/CEO.
- 2002 – 2008 Director of Planned Giving Services (interim capacity, reported to VP for University Advancement)
Responsible for planned giving program which includes:
 - Administration and review of all estate gifts;

- Coordinating visits with potential planned giving donors;
- Continuing education on all technical aspects of planned giving;
- Review and maintenance over web site specific to planned giving (including responses to inquires);
- Maintenance of Frontier Society member records;
- Coordination of annual Frontier Society recognition luncheon;
- Development and maintenance of 50 member Planned Giving Advisory Council (allied professionals – CPAs, attorneys, estate planning services, etc);
- Various mailings to selected constituency (7,000)
- Selection and ordering planned giving brochures and disseminating to college, units and donors;
- Creation and dissemination of planned giving marketing materials for use by all college and units.

JP Morgan/Chase Fort Collins/Loveland

Formerly Bank One and Affiliated Bankshares of Colorado

- 1984 – 1993 Various roles including Assistant Chief Financial Officer, Compliance Officer and Auditor. Responsibilities included operation and maintenance of general ledger, tax, financial and cost accounting functions, as well as supervising the accounting department operations. Duties included extensive budgeting and financial analysis, as well as training and review of multiple staff functions

Education Colorado State University, Fort Collins, Colorado

- Bachelor of Science in Business Administration
- Double concentration: Accounting and Industrial Relations
- Member, Beta Alpha Psi Professional Accounting Fraternity
- Graduate studies in taxation
- Achieved honor roll status each semester

Eastern Michigan University, Ypsilanti, Michigan

- Primarily core and accounting coursework
- Member, Beta Alpha Psi Professional Accounting Fraternity
- Member, Women’s varsity tennis team
- Achieved honor roll status each semester

Professional Development

- Active CPA certificate holder
- American Institute of CPAs, member
- Colorado Society of CPAs, member
- Housing Catalyst, Fort Collins – Audit/Finance Committee (2023-present)
- Annual attendance, National Conference on Planned Giving (1993-present)
- Annual attendance, Rocky Mountain Endowment Conference

- Attend various CASE conferences (national, regional, local)
- Attend various NACUBO Endowment Conferences

Activities

- CASE – Member, National Board for Institutionally Related Foundations (2012 – 2018)
- Former Board Member, Fort Collins Country Club (2012-2015)
- Former Board Member, Poudre School District Foundation
- Former Endowment Committee, Our Saviours Lutheran Church
- Former volunteer, CSU Women’s Association
- Former volunteer, Poudre Schools
- Former Board Member, Red Cross
- Former Finance/Budget Committee, Trinity Lutheran Church
- University of Michigan Athletic Award – Annual award by the University of Michigan Alumni Association to a high school senior exhibiting scholastic and academic achievement

Karen Dunbar (brief bio December 2023)

Since 2016, Karen has served CSU as Associate Vice President for Gift Planning and is responsible for the leadership and fundraising in the Gift Planning office in Advancement at CSU.

In 2022 and 2023, Karen served as Interim Vice President for University Advancement with service to three CSU presidents during a period of transition for the university.

For 23 years, Karen served as the Vice President, Treasurer and CFO of Colorado State University Foundation. Prior to that time, she worked for 9 years in the banking industry for a national bank and holding company as a controller, compliance officer, and auditor.

Karen received her B.S. in Business Administration with a concentration in accounting from CSU. She is a CPA, a member of the American Institute of CPAs, Colorado Society of CPAs, Colorado Planned Giving Roundtable, National Association of Gift Planners and CASE (Council for Advancement and Support of Education). As a member of CASE, she served 6 years (2012 – 2018) on the National Committee for College and University Foundations (formerly National Board for Institutionally Related Foundations). She is currently serving as a member of the Audit/Finance Committee for the Housing Catalyst in Fort Collins.