

## **1.0 Executive Summary**

The Caroline House  
811 Caroline Street  
Montgomery, Texas 77356

### **Introduction**

The Caroline House is a one-of-a-kind property located in historic downtown Montgomery, Texas, currently operating as a top-rated Bed & Breakfast since 2006 by Mary Eckhart Sims. The Caroline House is currently on the market for sale as a turnkey Bed & Breakfast business.

### **Our Services**

There are three homes on the picturesque almost one-acre (.939) property which boasts mature trees and foliage. The main house, known as the Shelton-Smith House, was built in the late 1850s and holds a designation as a historic home with the state of Texas. The main home offers formal living and dining rooms, den, large eat-in kitchen, oversized laundry/mudroom, downstairs primary suite, upstairs primary suite with sitting area and a downstairs guest suite. The property also features an 1,800 sq. ft. three bed/two bath guest house and a 500 sq. ft. one bed/one bath historic slave quarters, known as the Cottage, located behind the main home. The Caroline House offers guests a “home away from home” experience while they explore historic downtown Montgomery or visit the surrounding attractions.

### **Financial Considerations**

DH BROW is a limited liability company (LLC has been filed and awaiting final approval) seeking the opportunity to purchase The Caroline House.

Upon acquiring the property, DH BROW will continue operating The Caroline House as a Bed & Breakfast offering temporary lodging and aims to uphold The Caroline House’s current reputation. In addition to the Bed & Breakfast, and after obtaining the required permits and city planning approval, DH BROW intends to expand the business model by becoming an event venue for intimate events with a maximum guest count of 100. (Exact guest count will be determined upon approval with an in-person visit by the necessary licensed professional. The guest count of 100 is used throughout this document as an estimated placeholder occupancy of 150 for exterior events, allowing room for staff and vendors) Examples of the proposed intimate events are: weddings, bridal showers, family reunions, memorials, corporate events, etc.

### **Mission**

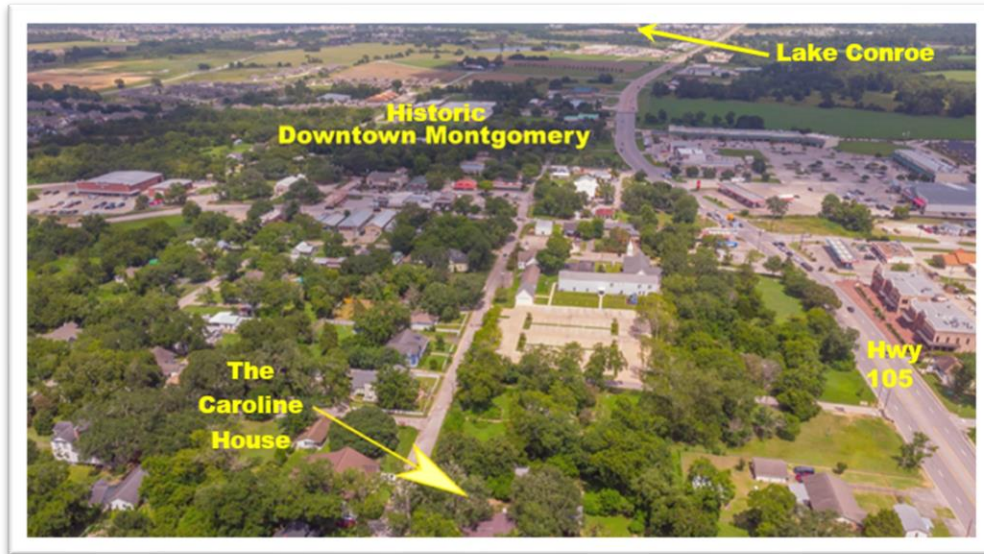
DH BROW holds the mission to provide all guests of the property with a comfortable, enjoyable, and memorable experience that will result in guests wanting to return for years to come. The respect, preservation, and rich history of the property is one that will be shared with each guest.

## 2.0 Business Description

The Caroline House is a one-of-a-kind property located in historic downtown Montgomery, currently operating as a top-rated Bed & Breakfast since 2006 by Mary Eckhart Sims.

### 2.1 Location

The Caroline House is located at 811 Caroline Street in the historic district of Montgomery, Texas.



The Caroline House is:

- Walking distance to historic downtown Montgomery
- Walking distance to chain grocery stores and restaurants
- Minutes to popular wedding venues and wineries
- Minutes to Lake Conroe and numerous other recreational opportunities, including Sam Houston National Forest
- 15 minutes to Margaritaville Resort and Conference Center
- Approximately 20 minutes to Conroe
- Approximately 35 minutes to The Woodlands: Waterway Marriot Hotel & Convention Center, Cynthia Woods Mitchell Pavilion, Market Street, and The Woodlands Mall
- Approximately 50 minutes to George bush International Airport
- Approximately 1 hour to downtown Houston



## 2.2 Property History

John E. Shelton, a home builder, who built many of the homes in Montgomery, purchased the land The Caroline House sits on in 1855 for the total sum of \$400.00. In 1858, the property was put up for sale by the Montgomery County Sherriff where it would be purchased by Captain Thomas W. Smith for a total of \$425.00. Smith was a well-known merchant, civil servant, and had even served in the Confederate Army during the Civil War. Records suggest that Smith either added onto the home or built a new home prior to the Civil War. The home was known as the T. W. Smith home until Smith moved to Willis after the Great Northern Railroad company began to lay track that would connect Houston to Chicago in 1870. In 1872, Smith established the Smith & Co. Cigar Manufacturing Company in Willis. Descendants of Captain Smith retained ownership of the property until 1924 when they sold the home to Thomas and Edna Gay. The home was then sold to Ken and Mary Whisenant in 1970. The Whisenant family was successful in petitioning the Texas Historical Commission to designate the Shelton-Smith house as a Historical Marker in 1976.

Mary Eckhart, the current owner, who purchased the property in 2000 is only the fourth family to own the home throughout its history. Ms. Eckhart, an interior designer, has lovingly restored the home and buildings to its former glory. There are four structures on the property. The first being the main house which was originally a one story with three dormer windows and a long porch that spanned the width of the home. Captain Smith's granddaughter, Stella Peynghaus, extensively remodeled the home in 1921. Stella's improvements such as the beaver board walls and the replacement of some of the heart pine flooring with one-inch-thick maple are what continue to provide the home with a unique character. Today, the now two-story home boasts 3,200 square feet of quality living space that includes formal living and dining rooms, cozy den, large eat-in kitchen, two downstairs bedrooms with ensuite baths, an upstairs two-bedroom suite with bath and sitting room, an oversized laundry room, and a sunroom. The main house retains many original features, including heart pine and maple flooring, fireplaces, chimneys, ceilings, hardware, and other fixtures. The second structure is the former slave quarters that was converted into a small guest cottage featuring a living area, bedroom, and full bathroom. The third structure, a large greenhouse that was used to grow orchids for commercial purposes, was built in the 1970s by the Gay family. This was converted into a lodge-style guest house in 2003. This home features an expansive living and dining area, full kitchen, laundry room, two bathrooms, and three spacious bedrooms. The fourth and last structure located on the property is a two-car garage where one bay has been converted into a game room. Each year, the property has been featured in the "Christmas in Historic Montgomery Home Tour". This annual event allows the public to tour many of the historical homes in downtown Montgomery.

## 2.3 Current Property Layout

### Main House – Shelton-Smith House

- Built in 1858
- 3,200 square feet
- 3 bedrooms, 3 full baths/1 powder room
- Formal Living, Formal Dining, Den, and Sunroom
- Kitchen with Dining area
- Oversized laundry/mudroom
- Large front porch and concrete patio



### Guest House

- Build in the 1970s
- 1,800 square feet
- 3 bedrooms, 2 full baths
- Living and Dining areas
- Kitchen with dining area
- Laundry Room
- Large front porch



### Cottage

- Built in the 1850s
- 500 square feet
- 1 bedroom, 1 full bath
- Living and Dining area
- Front Porch



### Grounds

- Guest house has a large storage area that will be converted to onsite living quarters
- Two car garage – one bay has been converted to game room
- Mature trees surrounded by lush landscaping
- Plenty of room for relaxing or to be used for hosting events



## 3.0 Market Analysis

Montgomery, Texas has a population of 1,575 (as of 2019) but pulls visitors and guests from the surrounding areas, such as the city of Houston, which has a population of 2,323,660 (as of 2021).

The lodging industry has the benefit of not being dependent on any single market segment, but instead is able to welcome guests from several.

### **3.1 Segmentation and Target Market**

The Caroline House's two major customer segments are those who are looking to "get away" from the city and enjoy a more relaxing lodging experience over the impersonal surroundings of hotels/motels and individuals from the surrounding communities looking for an intimate venue with lodging and charm for various events.

The Caroline House additionally appeals to the following market segments:

- Out of town tourists visiting Montgomery or the surrounding areas.
- Event and festival goers, ranging from events at Margaritaville to guests attending The Texas Renaissance Festival.
- Locals looking for a stay-cation.
- Wine lovers who are enjoying the Texas Bluebonnet Wine Trail or are staying to explore the local wineries at their own pace.
- History buffs who come to experience one of the oldest towns in Texas and the Birthplace of the Texas Flag.
- Brides and Grooms looking for an intimate wedding venue that offers charm, history, and lodging.
- Individuals looking to host an event or luncheon in a one of a kind and charming venue.

As Greater Houston continues to grow, Montgomery becomes an even more desirable destination with its charming downtown and surrounding attractions.

### **3.2 Market Needs**

There is an overall need in the Montgomery area for lodging. The Bed & Breakfast industry offers a comfortable lodging option for the ever-increasing group of travelers. Guests are welcomed into a home where they can feel a sense of community while still allowing for as much privacy as they desire to create an enjoyable and relaxing stay.

The Montgomery, Texas official government website lists Cedar Brake Park, Community Building, Memory park, and Hodge Podge Lodge as the only facilities on their "Plan an Event" page. While there are additional event venues in the surrounding area, The Caroline House offers walking distance to historic downtown Montgomery as well as lodging. The Caroline House offers outdoor and indoor space for those looking for a venue space for an intimate sized event.

## **4.0 Services**

The Caroline House will be run with authentic Southern hospitality to provide guests with lodging while visiting and experiencing the historic wonders of Montgomery, Texas.

### **4.1 Bed & Breakfast**

Guests will be able to choose a traditional Bed & Breakfast room with shared living room and dining room areas where they will be "part of the family" or select a more modern Bed & Breakfast approach and rent the Guest House or Cottage where they will have the house to themselves. Either selection gives guests access

to the relaxing gardens that are surrounded by lush greenery that makes you forget you are in the middle of town.  
need.

#### 4.2 Events

Each client will have an Event Manager for planning and day of. There will never be two events booked on the same day, giving guests time to set up, prepare, enjoy, and tear down without the worry of another event on top of them.

Efforts will be taken by The Caroline House to respect the surrounding residence, city operational hours as well as the city noise ordinance.

To allow space for event parking, one option being proposed is converting the west portion of the lawn into event parking. This will consist of adding a gate to the existing fence. The gate and parking area will only be open and used for events held at the Caroline House.



Created by Michelle Plaskett, November 28th, 2021. Source: Tax Parcel View (6/11/2021), ESRI Feature Service Layer, GIS\_Data\_MOCCO, Accessed 11/28/2021, Aerial2017\_6inch\_RGB(6/15/2017), ESRI Feature Service Layer, GIS\_Data\_MOCCO, Accessed 11/28/2021.

#### 4.3 Proposed Additional Revenue Streams

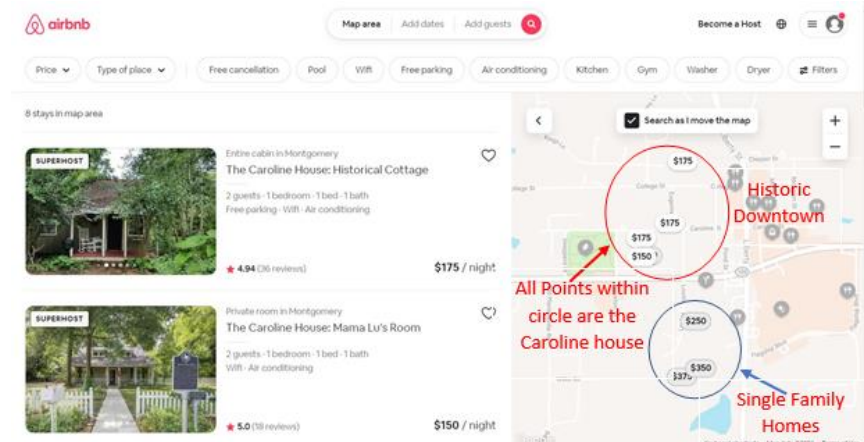
Other revenue streams, in addition to the Bed & Breakfast and event venue, will be considered in the future. This will consist of, but are not limited to, a gift shop of branded items and locally sourced items, and guided historic tours of Montgomery.

#### 4.4 SWOT Analysis

##### 4.4.1 Strengths

- Location: The Caroline House is located within walking distance to historic downtown Montgomery with eating establishments, local boutiques and downtown festivals; a short driving distance to nearby attractions such as multiple local wineries, The Texas Renaissance Festival, Margaritaville, Lake Conroe, Sam Houston National Park and Huntsville State Park; driving distance to The Woodlands and Houston attractions.
- Historic property: The Caroline House is a historic landmark. This allows marketing to a specific segment that is interested in staying and/or visiting historic properties.
- Lodging demand: Currently, there is only one other Bed & Breakfast, Hodge Podge Lodge, within the immediate area (1-mile radius) that offers single room lodging. According to the current owner, Hodge Podge Lodge sends its overage to The Caroline

House. Within a 4-mile radius, there are three other options for single room lodging. Other options in the downtown area, such as entire single-family residential homes for a nightly or weekly rate, are available, however, the cost is more significant and they are not within easy walking distance to downtown Montgomery. Most are found on [www.airbnb.com](http://www.airbnb.com) (in blue circle). The Caroline House rooms can also be found on the site (in red circle).



The need for lodging puts The Caroline House in a strong position to succeed as it is one of the only lodging opportunities for single rooms in the area.

- Increase in tourism for Montgomery: Montgomery is one of the oldest towns in Texas. Guests will be given the opportunity to learn the charm of Montgomery's history and what makes the Birthplace of the Texas Flag so special.
- Turnkey Bed & Breakfast: The Caroline House is being sold as an established business with the majority of the furniture remaining with the house.
- Online/Social media presence: The internet and social media outlets will be utilized to market and advertise The Caroline House. There will be a focus on gaining guest reviews and positive referrals.
- Event venue: With a demand for smaller venues in the downtown Montgomery area, The Caroline House will fill the need and become a popular destination for small intimate events.

#### 4.4.2 Weaknesses

- Novice Bed & Breakfast owners: While professional and knowledgeable, the management team will be new to the Bed & Breakfast industry.
- Aging property: Being built in the 1850's, The Caroline House will need routine repairs and upkeep in order to remain at its full potential.

- Unproven event history: The Special Use Permit has not been used for The Caroline House in many years. While this was due to personal choice of the current owner and not lack of interest, it is not currently established or known as an event facility.
- Parking: A lack of large parking area may prohibit events. The City's approval of event space and proposed parking plan is critical.
- Local/State/Federal Regulations: The initial task of obtaining necessary permits to run the business.
- Time/Days of operations: Will have to operate within the City's defined operating hours and within the City's noise ordinance.

#### **4.4.3 Opportunities**

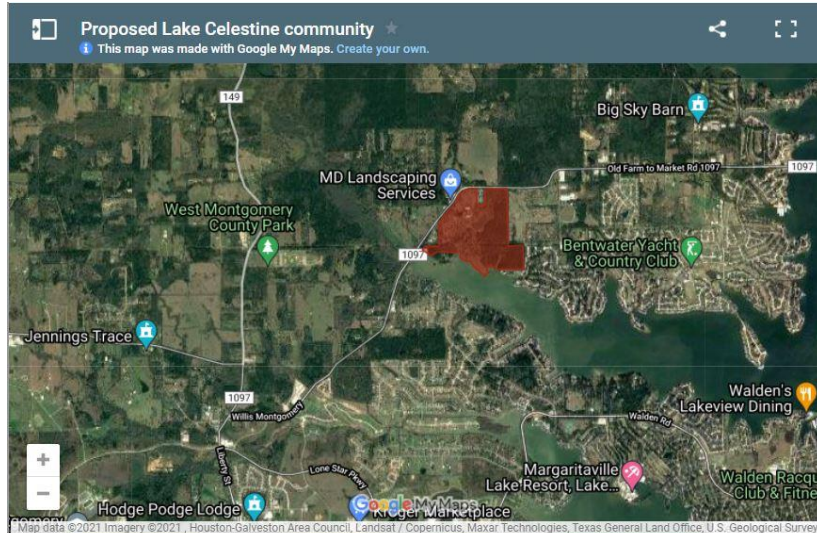
- Additional bedroom for rent: Growth will naturally occur in the Bed & Breakfast by opening the additional bedroom in the Main House as a rental option.
- Event venue: The property offers a lush garden area ideal for intimate events as well as sufficient space indoors to host small sit-down events, such as luncheons.
- Increased online marketing: With little online marketing currently being utilized for The Caroline House, there are ample opportunities to grow the online marketing.
- Refresh the property: Over the years, the outdoor gardens have become overgrown and will be refreshed. The inside of The Caroline House will also be evaluated and refreshed.
- Expanding other avenues of business: In the future, additional avenues such as historical tours, cemetery tours, bicycle tours, and wine tastings will be considered. In addition, having the branded items and locally sourced and handmade products available for purchase at The Caroline House for guests will promote the brand as well as local small businesses.

#### **4.4.4 Threats**

- City priorities: If the city of Montgomery changes the vision of downtown Montgomery, the need for a Bed & Breakfast and intimate event venue will be threatened.
- Unknown maintenance: As with any building, especially a historical building, there will be unknown maintenance required.
- COVID19: Travel and the lodging industry were put on pause for nearly a year and a half. While travel is currently increasing and life is beginning to look more like "normal", the future of COVID19 is ever changing and unknown.



- Lodging: Area growth may result in more lodging options such as hotels, RV Parks, and AirBnBs. An example is the proposed Lake Celestine development that will call for 1,038 residential lots as well as lakefront restaurants, retail stores, live-work units, creative office space, lakefront hotel and recreational amenities.



## 4.5 Regulations

### 4.5.1 State Permits

Business License – actively obtaining LLC to run the business  
Liquor License/Permit

### 4.5.2 City Permits

Special Use Permit (Bed & Breakfast and Events)  
Noise Ordinance

### 4.5.3 County Permits

Health/Food Safety  
Occupancy

### 4.5.4 Federal

ADA compliant

### 4.5.5 Insurance

Must have appropriate insurance to lessen risks of liability and lawsuits

## 5.0 Management & Organization Structure

### 5.1 Management Team

Individual Resumes for the management team can be found on pages 11-18.

**Craig Ivie:** Duties include overseeing the operations of the business and ensuring that all members of the team meet business goals. In addition to ensuring smooth business operations, he will participate in landscaping duties, general maintenance, event setup and tear down, and act as a guest advocate.

**Jamie Ivie:** Mrs. Ivie will supervise the overall guest experience and assist in preparing breakfast, housekeeping, and administration. She will assist in event setup and tear down.

**Michelle Plaskett:** Mrs. Plaskett’s duties will include overseeing and implementing all marketing strategies as well as overseeing daily accounting needs. She will also participate in cleaning, landscaping, and maintenance duties.

**Danielle Ivie:** Ms. Ivie will oversee client relationships from start to finish for each event. Ms. Ivie will live on-site for any guest needs and will assist in cleaning, landscaping and all other daily duties.

## 5.2 Professional Team

Additional help from professionals (i.e. Attorney, Accountant, Landscaper, Insurance Agent) will be utilized to ensure successful operations as needed.

## 6.0 Financial Plan

### Start-up Funding

DH BROW is seeking a loan to finance the purchase of The Caroline House, a Bed & Breakfast located at 811 Caroline Street, Montgomery, Texas 77356. DH BROW will contribute a down payment that will be applied to the purchase price, required permits, and associated closing costs. In addition, DH BROW will be seeking a construction loan to cover costs associated with the business model expansion. These costs include:

- Converting the storage area adjacent to the Guest House into living quarters for the on-site manager.
- Converting lawn on the west side of the property into additional parking (relocating electric pole).
- Enhancement of the grounds which will include landscaping and fence repair.
- Acquiring appropriate furniture and fixtures to be used to host events.
- Security system to include cameras and doorbells.



Created by Michelle Plaskett, November 28th, 2021. Source: Tax Parcel View (6/11/2021). ESRI Feature Service Layer. GIS\_Data\_MOCO. Accessed 11/28/2021. Aerial2017\_6Inch\_RGB(6/15/2017). ESRI Feature Service Layer. GIS\_Data\_MOCO. Accessed 11/28/2021.

## 7.0 Transition

The current owner, Mary Eckhart Sims, has expressed interest in assisting with a successful transition of business. This will include training in the Bed & Breakfast room booking software, education in the historical traits of the house, and day to day tips that she has learned over the years.

## CRAIG R. IVIE

14594 Hillshire, Willis Texas, 77318  
[Craig.ivie@gmail.com](mailto:Craig.ivie@gmail.com) | 713-962-4839

### Executive Management

#### Strategic Planning – Product Development – Organizational Execution

Accomplished Executive with domestic and international experience in Operations, P&L oversight, Product Development, Research, Manufacturing and new product growth. Results orientated, decisive leader with 25 years of proven success in leading teams towards common goals. Track record of creating an organizational culture where Safety and investing in employee training and career growth ultimately decrease employee turnover rates. Managed a strong team of Executives towards market growth and the diversification of standard products into new markets while improving daily operational efficiency.

#### Areas of Expertise

Leadership	Communication	Margin Improvement
Integrity	Organizational Execution	QHSE Performance
Budget/Forecasting	Product Development	Operational Execution
Collaborative Work Environment	R&D	

#### Professional EXPERIENCE

- **President & CEO** (BOS Solutions) 11/2015 – 9/1/2020  
Ultimate responsibility for the health, and safety of all employees, the development and implementation of strategic plans, budgets and the growth of the business for ensuring the financial and operational health of the corporation.
  - Managed a company of 500+ employees to a Revenue of over \$200M and EBITDA margin improvement by exceeding customer expectations in value, service quality and equipment performance.
  - Improved overall HSE performance and reduced injury rate (TRIR) from 1.5 to 0.2 by creating a positive Safety-First Culture
  - Managed the organization to an annual EBITDA increase of \$8.7 million from a \$15.3 million increase in Revenue (57% incremental margin improvement while maintaining market share)
  - Slashed field turnover rate from 40+% to 16% by putting competency, fixed pay rates, and career progression in place for employees.
  - Grew US market share from 4% to over 11% by focusing on customer needs and the companies organizational strengths.
- **Vice President Operations** (BOS-Solutions) 3/2012 – 11/2015  
Accountable for the growth and profitability of all BOS Operations while maintaining budgetary discipline. Provide mentorship to Operational Managers and worked to foster their management skills development. Worked closely with the VP of Sales and Marketing to develop and execute strategic actions to support the BOS business development process.
  - Upheld compliance with OSHA, labor laws, federal and local agencies and customer requirements leading 600+ personnel working on 180+ job sites.
  - Lowered the standard cost of equipment repair by 20%

- Extended equipment run life by 25% using robust R&M practices
- Managed the growth of the company by opening two new US District Offices
- **Director Engineering** (NOV Downhole) 1/2010 – 2/2012  
Working with a very dedicated staff of engineers and designers to maintain the robustness of our products. Activities include monitoring product reliability, working with the sales and manufacturing teams and our Product Line managers on all product offerings. This includes downhole motors, bits, drilling jars, hole opening, fishing tools, coring and other drill string components. Duties are also carried out with the desire to expand the capabilities and performance of our current product offerings and to also look outside the box for disruptive technologies that could be game changing.
  - Duties included:
    - Managed the process of bringing 5 new products to market.
    - Increased product Reliability by over 30% through stronger operational procedures and training.
    - Increased the overall input of patent applications from engineering groups by 50%
    - Developed and implemented a strategy around increased communication between engineering and sales teams through web-based seminars
- **Vice President Engineering** (Grant Prideco) 2008 - 2010  
Managed a department of over 220 people with an annual budget of \$28M. Departments included Product Line Support, Metallurgy, Manufacturing Engineering, Product Development and Research. Employees were in Singapore, Stonehouse, UK and Houston.
  - Duties included:
    - Full Budget responsibilities
    - Facilitated technical knowledge transfer across an organization of several hundred product lines
    - Managed and monitored engineers on projects within R&D from testing to market.
    - Creating Manufacturing standards for Domestic and International sites
      - Realized a 10% reduction in manufacturing cost
    - Development and Introduction of a Downhole Dynamic monitoring sub.
      - This product eventually grew into a standalone business within NOV.

### **Additional Experience:**

Research Manager – Schlumberger/ReedHycalog  
 Supervisor Research Labs – ReedHycalog  
 Product Engineer - ReedHycalog

### **Education and Technical Experience**

- BS Engineering from the Montana College of Mineral Science and Technology, Butte Montana
- Inventor on 5 patents – US7168506, US5096005, US494099, US6802215, US5029656

**REFERENCES:** Available on request

# Jamie Ivie

Willis, TX 77318

(713) 569-4876 | jamie.ivie@yahoo.com

## Professional Summary

Committed to inspiring personal drive and self-confidence through motivational training and skills development. Employs example-based instruction style to build trust as hands-on leader and guarantee safety of activities. Believes in open, constructive communication between staff and team to set clear goals and build vision of excellence.

## Skills

Motivation

Management

Community driven

Planning and Leadership

Creativity and Flexibility

Project organization

One-on-One Instruction

Individualized Coaching

## Professional Experience

- **Head of Neighborhood Women's Group** **September 2013 - Current**  
Bridgepoint Subdivision Willis, TX
  - Coordinated special events such as Fall Festival and Easter picnic.
  - Organize volunteers
  - Offered age-appropriate, fun and educational activities for children.
  - Used coordination and planning skills to achieve results according to schedule.
  - Participated in team-building activities to enhance relationships.
  - Conducted research, gathered information from multiple sources and presented results.
  - Organized and managed events and projects as part of community.
  - Planned and delivered numerous activities and special events for community.
  - Assisted with special events or programs.
  - Developed monthly schedules and assignments for community.
  - Supported engaging, fun and smooth-running events by helping with organization and planning.
  - Coordinated food, clothing and household items for disadvantaged individuals and families.
  - Met with other volunteers to discuss new opportunities.
  - Sent email reminders regarding upcoming volunteer events to community leaders
- **District Volunteer Coordinator** **August 2008 - May 2009**  
Klein Independent School District Klein, Texas
  - Managed volunteer calendar and verified coverage of key roles during volunteer unavailability.
  - Evaluated strengths of team members and assessed vacancies to match volunteers with positions.
  - Coordinated logistics of scheduling, supplying and transporting volunteers.
  - Worked with leadership staff and special committees to define volunteer mission and set standards.

- Uncovered opportunities for volunteer program improvement by soliciting staff feedback and evaluating volunteer performance.
  - Recruited and trained new volunteers on volunteer program goals and objectives.
  - Volunteered to help with special projects of varying degrees of complexity.
- **Church of Jesus Christ Of Latter Day Saints      January 1995 - September 2007**  
Klein, Texas Young Woman Leader
    - Mentored and supervised instructors and volunteer staff to carry out program goals.
    - Adapted classroom plans to support needs of children with special learning requirements.
    - Sourced, modified and prepared class curricula and targeted lesson plans based on subject matter requirements.
    - Analyzed revenue and program cost data to determine budget priorities.
    - Kept program children safe and secure at all times with proactive monitoring strategies.
    - Identified and recruited potential volunteer workers.
    - Prepared, coordinated and distributed information about yearly schedule of activities and classes.
    - Led young women in delivery of leadership project roles.
    - Worked to maintain outstanding attendance record, consistently arriving to work ready to start immediately.
    - Used coordination and planning skills to achieve results according to schedule.
    - Maintained energy and enthusiasm in fast-paced environment.
    - Supervised work of adult volunteers to keep on task for timely completion.
  - **Church of Jesus Christ Of Latter Day Saints      February 1995 to September 2000**  
Klein, Texas Young Woman Sports Director
    - Remained highly composed and calm in very fast-paced, stressful and constantly changing environments to provide optimal leadership and achieve desired results.
    - Developed schedules for volleyball and basketball games for numerous teams  
Developed project budgets and managed costs.
    - Coached young women in volleyball and basketball Organized and ran tournament brackets

## **Education**

High School Diploma - Granite High School May 1982

Philipsburg, MT

# Michelle Davis Plaskett

14572 Hillshire Drive ● Willis, TX 77318 ● 936-788-4962

[michelle.plaskett@Outlook.com](mailto:michelle.plaskett@Outlook.com)

## Education

---

**Sam Houston State University** – Huntsville, TX

May 2020

*Master of Science, Geographic Information Systems*

- Institutional GPA: 4.0
- Course Work:
  - Geographic Information, GIS Principles and Applications, Internet GIS, Spatial Analysis, Digital Image Processing, Cartography and Visualization, Energy GIS, Introduction to GPS, Lidar, and Radar, GIS Project Management, GIS and Law Enforcement, and Model Builder.

**Sam Houston State University** – Huntsville, TX

December 2014

*Bachelor of Arts, Double Major in Geography and History*

- Concentration in Cultural Geography
- Institutional GPA: 4.0 Cumulative GPA: 3.84
- Magna Cum Laude

## Work Experience

---

**Better Homes and Gardens Real Estate Gary Greene** – Willis, TX

May 2005 - Present

*Licensed Texas Real Estate Agent/Real Estate Investor*

- Licensed Texas Realtor since May 2005 with over 450+ education hours (License #0536875)
- Assists buyers and sellers achieve their real estate goals
- Possesses knowledge of the local real estate market and negotiating/communication skills
- Utilizes GIS software extensively to locate and value real estate to save time/money
- Used knowledge and skills to acquire income producing debt free real estate investment portfolio (12 single family residential homes)
  - Acts as a property manager for investment portfolio
    - Prepares and executes leases
    - Collects monthly rent
    - Uses Excel to maintain expense and income accounting
    - Maintains properties
    - Communicates/interacts with clientele and tradesmen

**Transaction Coordinator/Freelance Graphic Designer** – Willis, TX

2007 - Present

*Oversees Transactions /Designs Marketing Material*

- Primarily works for the Baudat Hildenbrandt team members a transaction coordinator
  - Oversees all aspects of transactions for buyers and sellers from first contact to close of contract
  - Prepares listing materials such as listing presentations, listing agreements, and inputs listings into MLS, subscription websites, and social media outlets
  - Ensures all documents have appropriate signatures

- Generates Commission Disbursement Authorizations and Funding Requests
- Designs and distributes marketing materials for Baudat Hildenbrandt Team members
  - Uses creative writing skills to market properties via numerous outlets
  - Past project designs include: postcards, flyers, trifold, signs, social media ads, and videos
  - Utilizes Montgomery County Appraisal District GIS software to determine best marketing strategies/areas

## **Volunteer Work and Community Involvement**

---

### **Bridgepoint Community – Willis, TX** 2014 - Present

- Designed and maintained property owner’s association website for several years
- Collected information for/designed neighborhood directory
- Co-founder of Bridgepoint Ladies Organization
  - Helps host neighborhood events – Easter Picnic, Fourth of July Fireworks, Fall Festival, and monthly ladies’ gatherings

### **Literacy Volunteers of America – Conroe, TX** Spring 2016

- Taught speakers of foreign languages in a group setting basic English with an emphasis on listening, reading, writing, speaking, and communication skills
- Completed tutor training for Adult Basic Education (ABE) and English as a Second Language (ESL)

### **Path to American Citizenship – Nestor Fitz** September 2016 - April 2017

- Individually assisted long standing green card holder pass the naturalization exam
- Taught student several hours per week to prepare for the civics, history, reading, writing, and English-speaking portions required to pass the naturalization exam
- Student successfully passed exam on April 13<sup>th</sup>, 2017 and became a United States citizen on April 26<sup>th</sup>, 2017

## **Skills**

---

### **Software:**

- ArcGIS, Google Maps/Earth, and Microsoft Streets and Trips
- Microsoft Office products: Windows, Word, Excel, Power Point, Publisher, Outlook, and Internet Explorer
- Adobe Photoshop CS4 and Acrobat Pro
- Google web-based products: Chrome, Docs, Drive, Calendar, Gmail, and Youtube
- Proficient in numerous real estate related web-based software: HAR Matrix, Back Agent, Zipforms Online, and numerous in-house Gary Greene products
- Proficient in social media platforms such as Facebook and Tiktok



# DANIELLE IVIE

1415 Eldridge Pkwy, Houston, Texas 77077

[Danielle.Ivie44@yahoo.com](mailto:Danielle.Ivie44@yahoo.com)

## SUMMARY

---

Dedicated and focused individual who excels at prioritizing, completing multiple tasks simultaneously and following through to achieve project goals. Seeking a role to utilize my talents and grow within an organization.

## HIGHLIGHTS

---

Results-oriented	Strong problem solver	Dedicated team player
Self-directed	Advanced MS Office	Adobe InDesign
Professional and mature	Suite knowledge	Schedule management

## EXPERIENCE

---

### CHRISTUS FOUNDATION FOR HEALTHCARE

Houston, Texas

#### Events Manager

5/2018 to Current

As the Events Manager at CHRISUTS Foundation for HealthCare, I am responsible for planning, managing and executing all Foundation Events, including but not limited to:

- Spring Luncheon: The Spring Luncheon is a yearly luncheon event held at the River Oaks Country Club with approximately 450 guests. The event consists of a VIP reception with a meet and great photo opportunity with our guest speaker followed by a short program and presentation by the guest speaker.
- Nun Run: This is police escorted motorcycle ride from Houston to San Leon with approximately 300 guests. The event begins with a band performance, program and raffle basket sales and ends with an awards ceremony and lunch for all guests.
- Young Professionals Events: As a Foundation, our goal is to increase our involvement with the Young Professionals through Happy Hour and volunteer events. These have included networking happy hours and making blankets for the Senior Community.

My responsibilities range from engaging event chairs and host committee members, researching, securing and arranging all event talent, working with the Communications Manager on all event mailing, communication and signage and all event logistics. Event logistics include coordinating with event venue, creating and updating the event timeline, arranging and overseeing all event vendors, tracking and managing event registration, recruiting and coordinating event volunteers and event run of show and management.

In my first year at CHRISTUS Foundation for HealthCare, the Events net revenue increased by 11%. This was achieved by successful marketing to prospective donors and decreasing unnecessary costs.

#### Community Involvement

Through CHRISTUS Foundation for HealthCare, I given the opportunity to be one of the starting committee members of "Veteran Transition Success Coalition (VTSC). VTSC offers resources for veterans and military families. My involvement includes assisting with the overall event logistics as well as the coordination of community and retail booth for the event.

I serve on the Advisory Board for the Houston Philanthropy Circle, a group with the mission to "empower philanthropists with networking opportunities amongst their peers as well as to introduce nonprofits to this donor community".

**WARD & AMES SPECIAL EVENTS, INC**  
Houston, Texas

**Graphics and Registration Lead**

7/2015 to 5/2018

As the Graphics and Registration Lead, my role was to work directly with the client and/or event chairs from start to finish, from the invitation to the final attendee reports. I guided the client and/or event chairs with all printed materials, including invitation, underwriter letter and program, and was responsible for creating sponsor scroll PowerPoints, go-to slides, and event signage. The process consisted of writing request for proposals for graphic designers and printers, tracking the event RSVPs, whether it be electronic or mailed replies, and advising on table arrangements and seating diagrams. Day of responsibilities included supervising registration volunteers and all troubleshooting.

**Production/Event Manager**

11/2013 to 5/2018

As Production/Event Manager, I assisted with large corporate and non-profit event planning, logistics, and day of responsibilities. These responsibilities included securing talent, coordinating their arrangements and overseeing a team in managing talent day of, creating and submitting décor request for proposals and coordinating décor previews with the selected company followed by organizing the décor team for load in and load out on day of, creating front elevation stage designs, and writing request for proposals for backdrop options.

**Administrative Assistant**

11/2013 to 7/2015

As the Administrative Assistant at Ward & Ames Special Events, Inc., I worked directly with Danny Ward, President and CEO, which gave me the opportunity to experience and acquire, first hand, the event planning world. I managed daily office operations and the maintenance of equipment. On a day-to-day basis, I designed and maintained electronic file systems, supervised all incoming and outgoing correspondence, managed the day-to-day calendar for the company, and created and maintained spreadsheets using advanced Excel functions and calculations to develop reports and lists.

**Samples of Events and Involvement:**

- Early Matters Houston – Registration Lead & Event Manager – was responsible for the logistics of a general conference and 9 breakout sessions, created online invitation, tracked and organized RSVPs via online system, and supervised the day of registration team 3/24/2017
- SunocoLP – Registration Lead & Event Manager – created online invitation, tracked RSVPs via online system for dinner event with 700 guests, and golfing tournament across 5 golf courses 10/4-5/2016
- EVA Airlines – Registration Lead – tracked and organized RSVPs and oversaw security credentials for 526 guest at George Bush Intercontinental Airport 6/19/2015
- Texas Children’s Hospital Legends Gala – supervised talent arrangements and managed talent day of event 2/25/2015
- Emirates Airline Launch Event – tracked and organized RSVPs and oversaw security credential for each guest at George Bush Intercontinental Airport and supervised the day of registration team 12/03/2014
- Houston Thanksgiving Parade – managed VIP performers 11/28/2013

**EDUCATION**

---

PSYCHOLOGY – **Sam Houston State University**, Huntsville, Texas, USA

2009-2013