

## William S. Harper Professional Profile

A seasoned professional with 30 years experience leading, managing and advising, primarily in the not-for-profit sector. A creative, insightful and ethical professional with a proven ability to achieve conflicting organizational goals in complex environments. Areas of expertise and focus include:

- Financial Management and Communications
- Education, Training and Regulatory Solutions
- Information Technology Strategy
- Member Services and Marketing

### Professional & Academic Credentials

**Chartered Accountant**, 1981 – Present

**Bachelor of Mathematics**, 1978, honours co-op, majoring in Computer Science

### Summary of Professional Experience

#### **William Harper Associates, 2003 – Present**

- President; providing consulting services to the not-for-profit sector in the areas of financial management and communications, education, training and self-regulation, IT strategy, and organizational governance, design and planning

#### **The Institute of Chartered Accountants of Ontario, 1988 – 2002**

- Vice-President of Operations & Chief Financial Officer (1999 – 2002); provided leadership of information technology, member records, finance and other administrative operations
- Director of Member Services (1991 – 1999); responsible for professional development programs, professional services, and advisory, insurance, affinity and other member services
- Associate Director of Professional & Technical Services (1988 – 1991); delivered advisory, advocacy, and other professional and technical services

#### **Clarkson Gordon (now Ernst & Young), 1978 – 1988**

- Audit and Computer Audit Manager (1984 – 1988); responsible for a diverse group of clients, including a variety of corporate, entrepreneurial and not-for-profit organizations
- Audit Senior and audit staff member (1978 – 1984); provided audit and consulting services to a variety of corporate, entrepreneurial and not-for-profit organizations

**University of Waterloo Co-op Program, work terms, 1973 – 1978**

## Volunteer Experience

### Windfall Clothing Service

- Board Chair, 2007 - Present
- Treasurer, Chair of Finance & Audit Committee, Chair of Agency & Donors Committee and Executive Committee and Bylaws Committee member (2004 – 2007)
- Board member (2003 – Present)

### Altruvest Charitable Services

- Group facilitator, BoardWorx Executive Director Program (2007 – Present)
- Guest presenter on board members' responsibilities (2004)

### United Way of Peterborough and District

- Professional Development session leader, "Financial Management for Not-for-Profits" (2007)

### CA Golf Day for Children's Charities

- Organizer, increasing the event's charitable proceeds from \$3,000 to \$80,000 (1995 – 2000)

### Volunteer Tax Clinics

- Assisted low-income and elderly taxpayers with their tax returns and related filings (several years from 1979 – 2000)

## Other Interests & Activities

Other interests and activities include Yoga, running, reading and raising two teenagers.

## Some Relevant Achievements

- Developed and led, over several years, integrated **strategic planning, business planning, and budgeting** processes for a large association, resulting in balanced budgets and operational initiatives aligned with strategies
- Directed the Canadian **development and roll-out of a new, global professional qualification program** (including education, experience and examination requirements), in consultation with colleagues in the UK, resulting in an over-subscribed first offering of the education program, including commitments of support from several international professional services organizations
- Led an **information technology service bureau**, providing a broad range of membership management, e-learning, and related infrastructure, database and communications applications to several professional associations and other not-for-profit organizations, concurrently increasing the scope of services, number of customers and customer satisfaction
- Developed and implemented **financial policies and procedures** for a newly-organized health-sector not-for-profit organization
- Developed and implemented an innovative continuing education program **marketing and communications strategy, which achieved a four-fold increase** in attendance with no increase in full-time staff and ultimately provided an increased financial contribution to the association
- Managed, and introduced leading-edge features to, comprehensive member life, health, dental, home & auto **insurance programs for members**, including working with plan actuaries, marketing experts, customer service teams and members
- Achieved significant, positive organizational culture change by persuading line departments to be responsible for information ownership and timely **stakeholder communications**. This was achieved concurrently with the comprehensive redesign and redevelopment of the organization's Web site, with on-line registration functionality and a staff-friendly content management interface
- **Streamlined volunteer committee structures**, including implementation of more flexible, responsive talent pools, resulting in clearer staff accountabilities, more active and effective advocacy, more efficient use of volunteer resources, and policy development times being reduced by 50%
- **Reduced costs and improved customer service** and operational efficiency by initiating and implementing new organization-wide business processes. Achieved this by moving from a departmental 'silo' structure to integrated administrative and customer service roles
- Significantly **enhanced board and external financial reporting** processes, including implementing full quarterly financial reports and briefings, and annual report management discussion & analysis. As a result, board members indicated an improved understanding and appreciation of the organization's operations
- Provided **vendor selection and systems implementation** advisory services to a mid-sized national association, resulting in a flawless implementation of comprehensive and integrated membership management and accounting systems