

Dr. KAREN F. KAUFMANN

Assistant Professor of Instruction, University of South Florida, School of Information

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EDUCATION

Queensland University of Technology/San Jose State University Gateway Ph.D., Information Science 2019

University of South Florida, Tampa, Florida M.A. Library and Information Science 2010

The University of Central Florida – Continuing Education Certified Financial Planning Certificate Program 2006

West Virginia Wesleyan B.S. Business Management/ B.A. Fashion Merchandising 1982 Areas of Concentration: Marketing and Management

AWARDS

Beta Phi Mu 2017 Eugene Garfield Doctoral Dissertation Fellowship

<https://www.betaphimu.org/garfield-recipients.html>

Dissertation

Kaufmann, K. F. (2018). [*Sociocognitive relevance of information literacy: The impact on student academic work*](#). (Doctoral dissertation). Retrieved from National Library of Australia.

APPOINTMENTS

[*Indian Journal of Information Sources and Services*](#) - [*Editorial Team*](#) - 2023-2025

PUBLICATIONS

Kaufmann, K. F. & Maybee, C. (forthcoming). *The Information Literacy Handbook: Charting the Discipline*. London: Facet Publishing.

Kaufmann, K.F & Maybee, C. (2024). Information Literacy: Celebrating 50 years! *Florida Libraries* (66)3, p. 24-28. <https://www.flalib.org/latest-issue>

Trnka, R.E., Kaufmann, K.F. and Miller, K (2024). Two Academic Libraries, One Study: Using Project Outcome for Assessment and Advocacy across Partner Institutions (Chapter 5). Gena Parsons-Diamond (Ed.) *Assessment and Advocacy: Using Project Outcome for Academic Libraries* Association of College and Research Libraries, ALA.

Maybee, C., Kaufmann, K., Tucker, V., & Budd, J. (2023). Recognizing information literacy as a discipline: Reflections on an ACRL panel discussion. *College and Research Libraries News*, 84(10), 364-368. <https://doi.org/10.5860/crln.84.10.363>

Miller, K., Kaufmann, K.F., & Trnka, R.E. (2023). Measuring outcomes: Information literacy instruction assessment in a cross-institutional study. *The Journal of Academic Librarianship*, 49(6). <https://doi.org/10.1016/j.acalib.2023.102796>

- Reed, K.N., Kester, B., Kaufmann, K.F., Homol, L., Crampsie, C. (2022). Crisis Librarianship: An Examination of Online Librarianship Roles in the Wake of the COVID-19 Pandemic, *The Journal of Academic Librarianship*, (48)4, <https://www.sciencedirect.com/science/article/pii/S0099133322000465>.
- Kaufmann, K.F. (2022). The “Real World” Relevance of Information Literacy: Part 2 – The Factors that Make Information Literacy Relevant in a Post-truth Era. In: Kurbanoglu, S., Špiranec, S., Ünal, Y., Boustany, J., Kos, D. (eds) Information Literacy in a Post-Truth Era. ECIL 2021. *Communications in Computer and Information Science*, vol 1533. Springer, Cham. https://doi.org/10.1007/978-3-030-99885-1_38
- Nuhn, P. & Kaufmann, K. (2021, August 3). The role of librarians in supporting transfer student success. *National Institute for the Study of Transfer Students*. <https://www.nists.org/post/role-of-librarians>
- Neely-Sardon, A., Neihouse, K., Ady, D., Hackman, M., Jernigan, K., Kaufmann, K., Smith, M., Uskokovich, S. (2020). *Information Literacy as Transdisciplinary in the Florida State College Curriculum*. American Library Association <https://www.ala.org/rusa/sections/brass/publications/academicbrass/2020/15-2>
http://www.ala.org/rusa/sites/ala.org.rusa/files/content/sections/brass/Publications/Acad_BRASS/2020_fall_%20neely-sardon_etal.pdf
- Nuhn, P. & Kaufmann K.F. (2021). *Supporting Transfer Student Success: The essential role of college and university libraries*. Libraries Unlimited
- Kaufmann, K., & Miller, C. (2020). Seamless Virtual Service: An Academic Library Response to COVID-19. *Qualitative And Quantitative Methods In Libraries*, 67-93. Retrieved from <http://qqml-journal.net/index.php/qqml/article/view/623>
- Kaufmann, K. F. (2018). [Sociocognitive relevance of information literacy: The impact on student academic work](#). (Doctoral dissertation). Retrieved from National Library of Australia.
- Kaufmann, K.F. (2018). Building Inclusion. ACRL in New Orleans: ACRL programs at the ALA Annual Conference. *College & Research Libraries News*, 79(8), 443-444. doi:<https://doi.org/10.5860/crln.79.8.438>
- Kaufmann K. F. (2018) The “Real World” Relevance of Information Literacy. In: Kurbanoglu S., Boustany J., Špiranec S., Grassian E., Mizrahi D., Roy L. (eds) Information Literacy in the Workplace. ECIL 2017. *Communications in Computer and Information Science*, vol 810. https://doi.org/10.1007/978-3-319-74334-9_61
- Kaufmann, K. F., Perez, G., Bryant, M. (2018). Reaching shared goals in higher education: A collaboration of the library and disability support services. *Library Leadership & Management*. 32(2). Retrieved from <https://journals.tdl.org/llm/index.php/llm/article/view/7194>
- Kaufmann, Karen F. (2016) Socio-Cognitive Relevance of Information Literacy: The impact on student academic work. Poster Session: IFLA WLIC 2016 – Columbus, OH – Connections. Collaboration. Community in Session 101 - Poster Sessions.
- Perez, J. & Kaufmann, K. (2016). Data Visualizations: A Tool for Advocacy. *Florida Libraries*, 59(1), 25-28. http://www.flalib.org/fl_lib_journal/2016/Spring_2016.pdf
- Harrison, Talisha & Kaufmann, Karen (2013). New Possibilities and Partnerships: How Superman Partnered Academics and Comics at Seminole State College Library. *Florida Libraries*, 56(2), 18-20.

http://www.flalib.org/fl_lib_journal/Fall2013.pdf Journal Article – Peer-Reviewed

Kaufmann, Karen, Larsen & DeSalvo (2012). Discovering the Discovery Tool: The Introduction and Impact on Research and Instruction at Seminole State College of Florida. *College & Undergraduate Libraries*, 19(2-4), 278-296. ISSN: 1069-1316 print/ 1545- 2539 online <http://dx.doi.org/10.1080/10691316.2012.693432>
<http://www.tandfonline.com/eprint/6dNZRgTARWp9K25kQz3Z/full> Special Issue: Discovery Tools: The Next Generation of Library Research (Peer Reviewed Journal)

MLIS Online Portfolio – 2010 <http://kfkaufma.myweb.usf.edu/webpage/kkportfolio.htm>

Enhancing Public Library Services for Seniors – 2010 (COMPS paper submitted to the University of South Florida Comps Committee) Marketing the Law Firm Library in the 21st Century- 2010 (Final paper submitted for Law Librarianship course)

Florida Library Association Library Days at the Legislature 2009, USF The Link Newsletter article.<http://kfkaufma.myweb.usf.edu/webpage/FLA%20Library%20Days%20at%20the%20Legislature%20article,%20The%20Link,%202009.jpg> Managing Change: Building Consensus – 2009 (Required for Introduction to Library Administration)

PRESENTATIONS Conferences:

Maybee, C., Kaufmann, K.F., Kurbanoglu, S., Moyo, M. (2024, October 15). Information Literacy as a Maturing Discipline: A revolutionary paradigm. Conference Panel- ICIL Conference, Alexandria, Egypt.

Budd, J, Kaufmann, K.F., Maybee, C. (2024, September 16). Telling Library Stories: Information Literacy a new discipline. Panel - Library Research Seminar VIII, Lexington, KY.

Johnston, B., Webber, S. Batool, S., Kaufmann, K.F., Maybee, C. (2024, May 15). Information Literacy as a Discipline Enabling Change. Conference - WILU -Workshop for Instruction in Library Use -(Vancouver, Canada).

Kaufmann, K.F., Maybee, C. (2024, April 19). Information Literacy as a Discipline in the Age of AI: A Conversation. Conference - GA International Information Literacy Conference.

Maybee, C., Kaufman, K., Webber, S., & Johnston, B. (2023, October). Recognizing the discipline of information literacy: Implications for research and practice [panel]. European Information Literacy Conference, Krakow, Poland.

Maybee, C., Kaufmann, K.F. (2023, May 11-13). The Discipline of Information Literacy: Changing the Conversation on Your Campus. [Conference Session]. LOEX Conference, Harrisburg, PA. [Presentation](#) (.pdf) Recording of presentation: The Discipline of Information Literacy: Changing the Conversation on Your Campus ([link](#)) Clarence Maybee (*Purdue University*) and Karen Kaufmann (*Seminole State College of Florida*) - May 13, 2023 password: loexHarrisburg

<https://commons.emich.edu/cgi/viewcontent.cgi?article=1020&context=loexconf2023>

Maybee, C., Kaufmann, K.F., Budd, J., Tucker, V. (2023, March 15-18). Casting a New Conversation: Recognizing Information Literacy as a Discipline. [Conference Session]. ACRL Conference, Pittsburgh, PA.

Kaufmann, K. F., Maybee, C. (2022, April 11-13). Information literacy: Elements of a Maturing Discipline. [Conference Session]. LILAC Conference, Manchester, England.

https://www.slideshare.net/infolit_group/information-literacy-elements-of-a-maturing-discipline-dr-karen-f-kaufmann-dr-clarence-maybee

Kaufmann, K.F. (2022, April 11-13). Factors that impact the Relevance of Information Literacy to College Students: The Kaleidoscope Effect. [Conference Session]. LILAC Conference, Manchester, England.

<https://www.lilacconference.com/lilac-2022>

https://www.slideshare.net/infolit_group/factors-that-impact-the-relevance-of-information-literacy-to-college-students-the-kaleidoscope-effect-dr-karen-f-kaufmann

Kaufmann, K. F. The “Real World” Relevance of Information Literacy: Part 2-The Factors that Make Information Literacy Relevant in a Post-Truth Era. In *The Seventh European Conference on Information Literacy (ECIL)* (p. 89).

Nuhn, P. & Kaufmann, K. (2021, October 11-13). Informed and Collaborative Librarians: Essential to Transfer Student Success. [Virtual Conference Session]. 28th National Conference on Students in Transition. https://www.dropbox.com/sh/epfepemk1nze8cs/AAB4n8r7yUOCUMwFDUsaS3WCa?dl=0&preview=CT-63+Informed+and+Collaborative+Librarians+Essential+to+Transfer+Student+Success_Trim.mp4

Kaufmann, K. (2020, April 6-8). *Factors that Impact the Relevance of Information Literacy to College Students: The Kaleidoscope Effect* [Virtual Conference Session]. LILAC Conference, Manchester, England. (In person Conference canceled)

Nuhn, Peggy Lee and Kaufmann, Karen F., "The Essential Role of College and University Librarians in Supporting Transfer Student Success" (2020). *Georgia International Conference on Information Literacy*. 2. <https://digitalcommons.georgiasouthern.edu/gaintlit/2020/2020/2>

Edford, R., Nuhn, P., Kaufmann, K., Moore, C. (2019) The Role of Academic Libraries in Supporting Student Transitions.[Conference Session]. National Conference on Students in Transition, Orlando, FL. <https://works.bepress.com/rachel-edford/3/>

ALA 2018 ACRL Program Presentation, New Orleans, LA. Kaufmann, K., Nuhn, P. Tracy, M., Mulvihill, R. Building Inclusion: How Can Research Instruction at Two-Year Colleges Help Students Successfully Transition to the University? <https://www.eventscribe.com/2018/ALA-Annual/fsPopup.asp?Mode=presInfo&PresentationID=352254A> LibGuide for the session is available at <https://guides.ucf.edu/buildinginclusion>—Karen F. Kaufman, *Seminole State College of Florida*, kaufmannk@seminolestate.edu

ALA 2018 EBSS Research Forum Lightning Talks Presentation, New Orleans, LA. Kaufmann, K., Nuhn, P. It Takes Two: How College and University Partnerships Can Mitigate Information Literacy ‘Transfer Shock’ <https://www.eventscribe.com/2018/ALA-Annual/fsPopup.asp?Mode=presInfo&PresentationID=380481>

ECIL 2017 Doctoral Forum, Saint-Malo, France.Kaufmann K. F. (2018) The “Real World” Relevance of Information Literacy. <http://ecil2017.ilconf.org/wp-content/uploads/sites/6/2017/10/D344KarenFKaufmann.pdf>

In conference proceedings: Kurbanoglu S., Boustany J., Špiranec S., Grassian E., Mizrahi D., Roy L. (eds) Information Literacy in the Workplace. ECIL 2017. Communications in Computer and Information Science, vol 810. https://doi.org/10.1007/978-3-319-74334-9_61

IFLA WLIC 2016 Poster Presentation Columbus, Ohio KAUFMANN, Karen F. (2016) Socio-Cognitive Relevance of Information Literacy: The impact on student academic work. Paper presented at IFLA WLIC 2016 –

Columbus, OH – Connections. Collaboration. Community in Session 101 - Poster Sessions.

27th International Conference on Teaching & Learning - Co-Presenter April 2016 “Building connections between value and knowledge: A mixed-method approach to teaching and assessing student research through the lens of the information literacy framework”

CARL – California Academic & Research Library Conference – April 2014 Poster “Managing Change - Leading Change: Theory to Practice” Conference Proceedings - <http://carl-conference.org/sessions/234>

International Information Fluency Conference – 2013 University of Central Florida – Co-Presenter, “Information Literacy Defined + Student Awareness = Steps Towards Information Fluency”

Florida Library Association (FLA) Conference – Spring 2012 Co-Presenter - Public Relations Committee “Library Snapshot Day 2011- The results and how to use them - Academic Libraries”

Webinars and Online Presentations:

Webber, S., Maybee, C., Kaufmann, K., Johnston, B., Shahid, S. B.. (2024, October 24). Information as a Discipline: what's the difference . Webinar - CILIP Information Literacy Group Online Panel.

Trnka, R.E., Kaufmann, K.F., Miller, K. (2024, October 1). Assessment and Advocacy: Using Project Outcome for Academic Libraries. Webinar—ACRL Presents: Assessment and Advocacy: Using Project Outcome for Academic Libraries.

Budd, J., Kaufmann, K.F., Maybee, C. (2024, September 27). Recognizing Information Literacy as a Discipline. LIS Pedagogy Chat (online discussion).

Bruce, S., Gibson C., Kaufmann, K.F., Maybee, C., Pagowsky, N. (2024, April 29). Celebrating 50 Years of Information Literacy. A Panel Discussion (Virtual Event).

Maybee, C., Kaufmann, K.F. (2024, April 10). The Discipline of Information Literacy: A conversation. Webinar- LEAF - Library Educators Action Forum, a Canadian library instruction group.

Budd, J., Kaufmann, K.F., Maybee, C., Webber, S. (2024, April 5). The Emerging Discipline of Information Literacy: A Conversation. Webinar - ALA Library Research Roundtable - [https://ala-events.zoom.us/rec/play/oacYOAIC1UEiKBlgzPpJoyts7HdR1vrZy3_rzfyCszP3TENA49VT3eVmo-S7qB05ctwm0vg02J47pGmB.fFgGv81SFTG8qHWS?accessLevel=meeting&canPlayFromShare=true&from=share_recording_detail&continueMode=true&componentName=rec-play&originRequestUrl=https%3A%2F%2Fala-events.zoom.us%2Frec%2Fshare%2FfS8FS343IsTmbIcwpc2eaItYsu_W4Hqx7hG_uUm2rzTNO9Xbfp_LYsH31BgBlVPD.oAK6kqmidEmBljy6\(LRRT\)](https://ala-events.zoom.us/rec/play/oacYOAIC1UEiKBlgzPpJoyts7HdR1vrZy3_rzfyCszP3TENA49VT3eVmo-S7qB05ctwm0vg02J47pGmB.fFgGv81SFTG8qHWS?accessLevel=meeting&canPlayFromShare=true&from=share_recording_detail&continueMode=true&componentName=rec-play&originRequestUrl=https%3A%2F%2Fala-events.zoom.us%2Frec%2Fshare%2FfS8FS343IsTmbIcwpc2eaItYsu_W4Hqx7hG_uUm2rzTNO9Xbfp_LYsH31BgBlVPD.oAK6kqmidEmBljy6(LRRT)).

Kaufmann, K. F. & Maybee, C. (2023, Nov. 14) ALIA. *Recognizing the Discipline of Information Literacy: Implications for Academic Libraries* <https://vimeo.com/884868032>

Bergoa, A. (Host) (2023, Sept. 27) *Academic Writer's Guide to the Writing Process: How to Help Students Avoid Pitfalls, Encourage Collaboration, and Save Time Grading Papers* [Webinar] https://zoom.us/rec/share/jp2CBI5Q3iuDecjJJwVzuDNay-LaX3ejE6P_LfEpfswLAcVyrmg6aWXcHI_HNs z8.FLg75KSNL_1FYdB5

Kaufmann, K.F., Miller, K. Edford, R. (2023) Findings from evaluating *Library Instruction at 2-Year and 4-Year Institutions*. [Webinar]. ALA ACRL Project Outcome. https://www.youtube.com/watch?v=lgvaYu42L_A

Reed, K.N., Kaufmann, K.F., Kester, B., Homol, L., & Crampsie, C. (2022, May 24). *A Survey of Online Librarianship Roles Pre- and Post-Pandemic*. 14th Qualitative and Quantitative Methods in Libraries International Conference (QQML 2022). http://qqml.org/wp-content/uploads/2017/09/Programme-Final-QQML-2022_20220525.pdf, p. 85

Kaufmann, K.F.F., Miller, K. Edford, R. (2022) *Evaluating Library Instruction at 2-Year and 4-Year Institutions*. [Webinar]. ALA ACRL Project Outcome. https://youtu.be/i_eyqr78hYg

Brauer, J. (Host) (August 23, 2021). Librarians as #Transfer Champions. (No. 1) [Audio Podcast Episode]. *Transfer Nation Talks*. National Institute for the Study of Transfer Students. <https://www.listennotes.com/podcasts/transfer-nation/librarians-as-xn4wo31jqWR/>

Nuhn, P., Kaufmann, K.F. (2021, August). [The Role of Librarians in Supporting Transfer Student Success](https://www.nists.org/post/role-of-librarians) [Blog]. *National Institute for the Study of Transfer Students*. <https://www.nists.org/post/role-of-librarians>

Nuhn, P., Kaufmann, K.F. (March 31, 2021) *Supporting Our Growing Transfer Student Population: The Value of Being an Informed and Collaborative Librarian*[Webinar]. Niche Academy. <https://www.nicheacademy.com/blog/supporting-our-growing-transfer-student-population>

Kaufmann, K., (2020, May 19. *What Makes Information Literacy Relevant to Higher Education Students?: The Kaleidoscope Effect*. Association for Learning Development in Higher Education. <http://aldinhe.ac.uk/events/what-makes-information-literacy-relevant-to-college-students-the-kaleidoscope-effect/>

ACRL EBSS Virtual Research Forum - May 15, 2019 - *College Perceptions of the Relevance of Information Literacy to their Academic Work*. <https://youtu.be/3R7A-xC4ZS8>

ACRL PA Library Association Division Connect & Communicate Series - September 17, 2015, Framework Un-Conference – A Virtual Presentation, Panelist Presenter. *Introducing the Framework for Information Literacy for Higher Education*.

Seminole State College of Florida Presentations:

Faculty Center for Teaching & Learning - Winter Welcome Back 2021 Seminole State College of Florida

Becoming an Antiracist Educator Co-Presenter

Faculty Center for Teaching & Learning - Fall Welcome Back 2019 Seminole State College of Florida [Scaffolding to Support Transfer Student Success](#) Co-Presenter

Faculty Center for Teaching & Learning- Winter Welcome Back 2017 Seminole State College of Florida Information Literacy Roundtable – Integrating Information Literacy into Academic Work

Faculty Center for Teaching & Learning Workshop - October 2015 Seminole State College of Florida Shifting Paradigms on Information Literacy

Board of Trustees – January 2014 Role of Faculty Librarians -We Change Lives Co-Presenter

Biology Colloquium - Fall 2013 Reading Primary Literature Co-Presenter - collaborative work with biology faculty

Faculty Welcome Back - August 2013 Discover Library LINCCWeb – Tag You’re It! Features tagging, reviews, and resources to enhance learning and communication. Co-Presenter

Library Staff Development Day - August 2013 Training Opportunities: Helpful options to build on staff development Co-Presenter

Faculty Center for Teaching & Learning - Winter Welcome Back 2013 Information Literacy & Research Tools to Enhance Learning Outcomes Co-Presenter

Faculty Center for Teaching & Learning – Winter Welcome Back 2012 Oh the Places You’ll Go Co-Presenter

Faculty Center for Teaching & Learning – Fall Welcome Back 2012 New Twists to Library Research Co-Presenter

Student Life – Fall Student Voice Forum 2012 Library Resources and Services

Teaching Experience

University of South Florida, School of Information 2023-present

Assistant Professor of Instruction

Seminole State College of Florida 2010-present

Adjunct Professor

BSHS -online one-credit LIS 2004 Research Strategies for College Students - required course in the BSHS program

Professor

Teaching online as an embedded librarian across disciplines - primarily in business, social sciences, and health science courses.

Teaching on-campus information literacy and research sessions as a lecturer across various disciplines as part of the information literacy instruction program at Seminole State College of Florida.

PROFESSIONAL COMMITTEES

ALA Library Research Round Table, Chair (2022-2023)

Association for Information Science & Technology (ASIST) Program Review Committee 2019 - 2023

Association for Information Science & Technology (ASIST) SIG Social Media, Officer 2017-2021

Florida Council on Instructional Affairs Learning Resource Standing Committee - Library and Information Science Curriculum Committee Three-year appointment, July 2016 2019, extended to 2023

San Jose State University iSchool Program Advisory Committee Information Intermediation and Instruction - September 2017 - present

ALA Association of College & Research Libraries (ACRL)/ Education & Behavioral Sciences Section (EBSS) Online Learning Research Committee - July 2018 - 2022

ALA Library Research Round Table chair-elect 2021-2022

Seminole State College of Florida Faculty Senate, Officer, 2nd Vice President 2020-2021; At-Large Representative, 2018-2023

PROFESSIONAL ASSOCIATIONS

American Library Association 2015 to present

Association of College & Research Libraries 2015 - present

Education Behavioral Social Science 2015- present

Library Leadership & Management Association (CORE) 2015 - 2021

Reference & User Services Association (RUSA) 2015 - 2022

Library Research Round Table 2018-present; Chair (2022-2023)

Association for Information Science & Technology (ASIS&T) 2014 to 2023

Florida Library Association (FLA) 2008 to 2017; Marketing Committee 2010-2016, Chair 2014-2016

EMPLOYMENT – Research-Related

San Jose State University - Higher Education/Academia

- Post-doctoral Research Assistant Part-Time January - July 2019

Seminole State College of Florida Library – Higher Education/Academia

Faculty Librarian, Research & Instruction – Full-Time Aug. 2013-present Provide information literacy instruction in virtual and on-campus environments. Currently teaching online LIS 2004 Research Strategies for College Students for Bachelor of Health Science students. This course is required for program completion.

Conduct academic research, and provide faculty liaising for business and social sciences instruction, reference, and collection development. Market the library to build library visibility and promote services. Build public relations partnerships with college departments, representatives, and faculty for enhanced collaborative opportunities in teaching and contributing to student success. Research User- Relevance: draw correlations between information literacy, defining and identifying information literacy skills & increased interest in student interactions during instruction sessions. Began to collect data to identify relevance.

o Campus Librarian-Sanford/Lake Mary Campus – Full-Time June 2011- Aug. 2013 Under the direction of the Dean and Associate Dean, responsible for Public Services at the largest campus Library at Seminole State College of Florida. Coordinated with librarians and other library departments for schedules, communication, and services. Supervised staff including training, implemented new direction for services and processes, and provided yearly performance evaluations. Marketed the library and built partnerships on campus to build library visibility and promote services. Provided information literacy instruction in online and actual environments, faculty liaison work, reference, collection development, and academic research.

o Reference & Instruction Librarian – Part Time Nov. 2010- June 2011 Provided professional library services with an emphasis on reference, instruction, collection development, and academic research. Promoted library services and resources using a collaborative approach with cross-disciplinary department involvement.

Rollins College, Office of Foundation Relations – Part-Time

o Graduate Assistant Nov. 2008 – July 2010 Provided in-depth research on special projects, collaborated to develop naming guidelines for digital files, created a website for the department, developed the process for streamlining grant reporting and stewardship data, and managed the department budget. Research Relevance – Building on institutional knowledge acquired while previously employed by Rollins as a researcher for the Crummer Business School, continued to find associations and connections to foundations and individuals for development research.

Financial Directions, Inc.

o Investment Portfolio Analyst Sept. 2004-June 2007 Provided investment and portfolio research and evaluations about investments in securities, insurance, and annuity products. Developed recommendations for asset allocation relative to investment goals and portfolio evaluation. Research Relevance – Using financial resources and prior knowledge acquired while working as a financial advisor, developed research reports for clients using research methods and synthesis and analysis for investments and recommendations. Research questions, analysis, assessment, and investment comparisons of financial data were employed.

Rollins College, Office of Advancement Research/Crummer Graduate School of Business

o Researcher Aug. 1996–May 1998 Created research proposals and reports provided for the business school, president, development officers, and college representatives. Provided detailed data on foundation, corporate, alumni, and individual donor prospects for the Crummer Graduate School of Business. Utilized extensive research techniques, including online resources, as well as the in-house development office research library. Research Relevance – Identified research methods appropriate for reporting data that was significant and relevant based on the research request. Developed research methods and used a variety of resources to collect and report findings in succinct and readable formats.