

People

John Whaley brings to clients more than 30 years of experience in development including 20 years in consulting. Formerly, John was a founding principal and President of Bentz Whaley Flessner. With that firm he led consulting engagements for such clients as the Statue of Liberty - Ellis Island Foundation, the National Audubon Society, and the University of Massachusetts. His areas of expertise include development program assessment, strategic development planning, campaign planning, planned giving counsel and endowment goal development.

Before entering consulting, John served as Planned Giving Officer for the Grand Rapids Baptist College and as Vice President and Director of Development for the University of Minnesota Foundation. John also has professional experience in education and marketing.

John holds a master's degree in education from Eastern Michigan University. He has served on the governing boards of several not-for-profit organizations, written for professional journals, and presented at CASE, AFP, AHP, and ASOL conferences and seminars.

Julie LeVay brings to clients more than 30 years of consulting and institutional development experience. Julie was formerly a senior associate of Bentz Whaley Flessner where she served a variety of clients. Her particular areas of expertise include campaign planning and strategy development, institutional audits and training, integration of advancement objectives into the institutional planning process, and annual fund and campaign management.

Prior to her consulting career, Julie served The Claremont Colleges where she directed a successful capital campaign. Julie has also served as the chief development officer for San Francisco Opera, and has held development positions with the University of California, Santa Barbara, and Cate School.

Julie is a graduate of the University of California, Santa Barbara and Marlborough School. She is a frequent speaker and has made presentations for CASE, NAIS, CAIS, AFP, AHP and the Foundation for Independent Higher Education.

Carolyn Hom has worked in development, marketing and public relations for more than 20 years. She has served as capital campaign director for St. Mark's School in Altadena, Calif., and as vice president for development and marketing for the Autry Museum of Western Heritage in Los Angeles. Prior to that, she directed the community and media relations activities of the Los Angeles Times.

A Whaley LeVay associate since 1998, Carolyn has assisted a variety of clients with communications strategies, campaign planning studies and development audits.

At St. Mark's, Carolyn helped guide the school's first-time capital campaign efforts, which raised almost 40% above the original goal. At the Autry Museum, she designed and managed comprehensive marketing and fund-raising strategies that resulted in a five-fold increase in development and membership revenues in five years. As part of her duties at The Times, she coordinated the activities of the newspaper's charitable foundation serving underprivileged youth.

Carolyn is a graduate of the University of Southern California and holds a bachelor's degree in journalism.

Tom Peterson has worked for over 20 years in financial and information systems as a consultant and on the staff of for-profit and not-for-profit organizations. He brings clients a broad background in systems design and implementation, as well as financial and operations management.

Tom has been with Whaley LeVay since its inception and has worked with many of the firm's clients in selecting development software, creating prospect management systems and developing financial models.

Tom completed his graduate work at the Business School, University of California, Berkeley, where his emphasis was operations management. Jean Kieling has eight years of experience in prospect research, including seven as a consultant. Her areas of expertise include prospect identification, research and management.

Jean has provided services to a variety of not-for-profit organizations, including those in education, the arts, health care and social services.

Jean received a bachelor's degree in economics from Occidental College and a bachelor's degree in business from the University of Maryland. Prior to her career in prospect research she worked as an industry analyst and an accountant. She is a member of the Association of Professional Researchers for Advancement and the Association of Independent Information Professionals.