

SANDRA A. SURAN'S BIOGRAPHY

Career Focus: “The key to building organizational resilience in the face of today’s constant risks and challenges is not a complex, sophisticated tool. There is no ‘magic bullet’. The key is to assess, improve, and integrate organization structures, processes, and systems while simultaneously building a more unified team with every change undertaken.”

Biography Summary

Sandra Suran, CPA, founded The Suran Group in 1990 to help organizations accomplish sustainable changes while building organizational resilience. Projects include organizational assistance with mergers; strategies for linking departments and for improved effectiveness; ramp up and governance for organizations experiencing rapid growth and major change; strategic and operations planning and implementation. That means linking traditional Risk Management (process improvement, risk assessment, financial/information analysis) with Organization Development and other areas including marketing, human resources, and systems integration.

Sandra has experience working with a variety of industries including high-tech companies, health care, government, construction, education institutions (including universities), service-centered organizations, manufacturing and distribution organizations, and financial institutions. For example, she has led the development and facilitated the implementation of over 80 comprehensive organizational strategic plans, including plans for multiple-entity collaborations. She has coordinated the planning and supervised the implementation of a similar number of organizational restructurings to accomplish increased responsiveness to stakeholders and improved effectiveness for private, governmental and not-for-profit entities.

Prior to founding The Suran Group in 1990, Sandra was founder and partner-in-charge of Audit and Consulting departments for one of Portland’s largest CPA firms, Suran & Company, which merged with KPMG Peat Marwick in 1985. She subsequently became an Audit and Consulting partner with KPMG, serving on the national Middle Market steering committee.

After leaving KPMG, the State of Oregon hired Sandra to develop a strategic plan for small business in Oregon, to lead the development and implementation of small business programs for the State as Oregon's 1st Small Business Advocate, and to develop language and lobby the legislature to establish the Small Business Program in statute. This included working directly with the Governor and the Economic Development Department, supervising the statewide Small Business Development Center Network (a partnership of the U.S. Small Business Administration, Oregon's community college system, and the Oregon Economic Development Department), working with state funding agencies, establishing a program of 26 state agency Business Assistance Officers (BAO) to assess needs and develop process improvement programs to streamline regulatory compliance for private business, and to design and establish a database and service hotline program for small business linked with the BAOs.

Sandra is a frequent writer, instructor and speaker at national and regional conferences on such topics as effectively accomplishing change, developing organization resilience, strategic and operations planning, alliances, Board relationships and governance, future trends, managing change, and entrepreneurial economics.

Sandra has founded or significantly restructured and chaired numerous local and national professional and civic organizations, such as the Professional Services Council of Oregon, the National Association of State Boards of Accountancy, Catholic Charities of Oregon, Tualatin Valley Economic Development Corporation (now the Westside Alliance) and the Advisory Council on Small Business and Agriculture for the Federal Reserve Bank of San Francisco. She is a former trustee of the University of Portland, former Chair of St. Vincent Hospital and Medical Center Advisory Board, former Board member of the American Institute of CPAs, and has been the recipient of many awards for excellence and leadership in business.

Detailed Resume

Professional Experience:

The Suran Group LLC, CEO 1990–Present

Consulting firm specializing in comprehensive change planning and project

management/resilience development for small and large companies and organizations.

Atkinson Graduate School of Management, Willamette University August – December, 2015

Contributing Assistant Professor. Developed and taught a Risk Management course partially based on her book, *The DNA of the Resilient Organization – How One Collective Heartbeat Leads to Continuous Competitive Advantage*. The course is titled, *Enterprise Risk Reduction for Sustainable Growth*.

State of Oregon, Small Business Advocate 1988–1989

Loaned Executive. Led development of small business strategic plan; supervised implementation of small business programs; led establishment of small business department for State of Oregon.

KPMG Peat Marwick, Partner 1985–1989

Audit and Consulting Partner serving clients in small business, education, and not-for-profit industries. Served on national Middle Market steering committee.

Suran & Company CPAs, Founding Partner 1974–1985

Auditor; consultant on strategic and operational planning; development of business plans, financing alternatives, organizational strategies and structures; new business acquisition and business sale assistance; financial and general management information systems assistance.

Public Boards:

Northwest Commission on Colleges & Universities – Commissioner (One of three Public Members) – 2018 - Present

Federal Reserve Bank:

Federal Reserve Bank of San Francisco

- Portland Branch – Past Member, Board of Directors 1985-1990
- Vice Chair, 12th District Advisory Council on Small Business and Agriculture 1985-1990
- Audit Committee 1985 - 1990

National Conferences on Small Business and Agriculture, Co-Chair 1986, 1987, 1988. Responsibilities included Chairing National meeting of delegates from all Twelve Federal Reserve Districts, culminating in service as Co-chair of meetings with Board of Governors Chairs Greenspan and Volcker.

Oregon Mutual Insurance Company – Past Member, Board of Directors

Business Banking Corporation – Past Organizing Director (Subsequently acquired by U.S. National Bank of Oregon)

Oregon FAIR Plan (State Insurance Regulatory Board), Past Chair - First non-insurance industry chair and first woman chair

Professional Activities - Highlights:

American Institute of CPAs (AICPA):

- Current Member
- Foundation Board of Trustees, 1997–2000
- Special Committee on Assurance Services, 1994–1996
- **Board of Directors, 1989–1992**
- Audit Committee, 1989–1992
- Private Companies Practice Section: Technical Issues Committee, Founder/ Chair, 1980–1983
- Private Companies Practice Section Board 1978-1984 (established national Peer Review process for CPAs)

Financial Accounting Standards Board (FASB) – Small Business Advisory Council, 1985-88

National Association of State Boards of Accountancy (NASBA):

- Leadership Development Group, 2013 - Present
- Communications Committee, 2009 – 2012
- Relevance & Effectiveness Committee, 2009-2011
- Enforcement Committee, 2008–2009
- Past Chair Advisory Council, 2001– Present
- **President/Chair, 1984–1985** (54 states and U.S. jurisdictions)

Oregon State Board of Accountancy, 1977-1983; Chair 1979–1981 (First Woman Chair)

Served as Administrative Judge on licensing issues; established Oregon’s 1st CPA/PA Quality Review program.

Oregon Society of CPAs,

- Current Member
- NFP Committee, Member Development & Recruiting Founder and Past Chair, “What Matters for NFPs” Program 2012 – Present
- Past Chair of numerous committees

Oregon FAIR (Fair Access to Insurance Requirements) Plan Board – State Insurance Regulatory Board (First Non-Insurance Industry Board Chair; First Woman Chair) – 1978 - 1983

Recent Civic and Community Activity Highlights:

- Archdiocese of Portland 2010-2014
 - Finance Council
 - Audit Committee

- Providence Health System of Oregon
 - Brain and Spine Institute Advisory Council, 2009–2014
 - St. Vincent’s Hospital & Medical Center, Past Chair Advisory Board of Directors, 1985–1991

- University of Portland
 - Center for Entrepreneurship Advisory Council, 2008-2013
 - Board of Regents 1982-1991
 - Chair, National Alumni Association 1978 - 1984

- Oregon Paleo Lands Institute, Vice Chair and Board Member, 2007–2010

- Washington County Museum, Steward, 1987–Present

- University Club of Oregon, Foundation Board of Trustees, 2000–2003

- Professional Services Council of Oregon, Founding Chair, Executive Committee, 1994–2003

- Portland State University, Walk of the Heroines Founding Board of Directors, 1999–2002

- Oregon Symphony, Board of Directors, 1994–1999

- Japan-America Society of Oregon, Board of Directors and Executive Committee, 1987–1998

- Better Business Bureau of Oregon, Vice Chair, Board of Directors, 1990–1996

- Metro Portland 2040 Policy Advisory Committee (MPAC), Citizen Member 1993–1994

Honors and Awards

- Sustained Contribution Award, American Institute of CPAs, October 2015

- Sandra’s article, “How to Implement Change Effectively”, published in 2003 by the national, juried publication: Journal of Corporate Accounting and Finance (John Wiley & Sons) was selected as one of their Top Articles of All Time in January, 2015. It is featured on the cover of their “Best of JCAF” issue, May/June 2015. Selection by their Editorial Board was based on two criteria: “Most enduringly useful” and “Most accessed”.

- “Ray Dezember Award for Exemplifying the Meaning of Fed Family”, Federal Reserve Bank of San Francisco, April 2015

- “ The Collective Heartbeat – The Foundation for Organizational Resilience” – January 2015 Feature Article about Sandra in ASPIRE Magazine (On-line Magazine to “inspire people around the world to use business as a force for good and to shine the spotlight on Game Changers”).
- Lifetime Achievement, National Association of State Boards of Accountancy (NASBA) - Van Rensselaer Award for Public Service for ‘Excellence in leadership, accomplishments and contributions to the CPA profession”, October 2011
- Distinguished Alumni, University of Portland 2010
- Distinguished Service to the City of Portland, Rotary Club of Portland 1998
- Abigail Scott Duniway Award for Improving the Status of Women in Oregon (First businesswoman selected), 1989
- Honorary Life Member, Beta Gamma Sigma (International Business Honor Society), 1989
- White Rose Award for Outstanding Women in Oregon, 1987
- Service to the Profession, American Women’s Society of CPAs) of Oregon, 1986
- Beta Alpha Psi (National Accounting Fraternity), Honorary Member, 1984
- National Small Business Advocate of the Year, U.S. Small Business Administration (SBA), 1983
- Oregon Business Leader of the Year, Associated Oregon Industries, 1981

Education, Credentials and Certificates

- BBA in Accounting, University of Portland 1968
- Certified Public Accountant; Active License
- Certificate for program “Negotiation and Dealing with Difficult People”, Harvard Law School Program on Negotiation, 2008

Books, Articles, Reports and Presentations:

Book:

“The DNA of the Resilient Organization - How One Collective Heartbeat Creates Continuous Competitive Advantage”.

Published 2014, Stargazer Publishing.

Magazine Articles (Selected):

- “How to Implement Change Effectively” *The Journal of Corporate Accounting & Finance*, Wiley Publications, January, 2003
- “Accounting Reforms” - *The Oregonian*, January 24, 2002
- “Professional Services – New Net Export” – *The Legislative Review*, AOI, September 1997
- “Change Or Die” – *Tennessee CPA, Magazine*, June 1996
- “On the Road to Greater Value” – *Montana Society of CPAs*, Feb 1996
- “The Next Plateau”, *The Business Journal*, October 1995
- “Thinking Like An Entrepreneur – To Accomplish Constant Change”, *CPA Management Consultant*, Summer 1995
- “Oregon on the Brink”, *Oregon Business Magazine*, April 1994

Author/Coordinator of Published Reports (Selected):

- *Business Survey of Oregon Professional Services Firms*, published June, 2000 by the Professional Services Coordinating Council of Oregon
- *Business Survey of Oregon Companies*, published 1993 by Oregon Business Research, a division of Oregon Business Media

Presentations (Selected Recent):

- “The Economy and Small Business”, Institute of Management Consultants, April 20, 2017
- “Helping Women in Leadership Effectively Accomplish Change within Their Organizations”, Bank of Commerce, May 29, 2015
- “The Key to Building Organizational Resilience in the Face of Today’s Constant Risks and Challenges - There Is No ‘Magic Bullet’”, Institute of Management Accountants, May 19, 2015
- “DNA . . . Resilient Organization, How One Collective Heartbeat Creates Continuous Competitive Advantage”, University Club, January 14, 2015
- “OSCPA – What Matters for Not-For-Profits Series: “Strategic Planning: Approaches, Benefits, Challenges” – Oregon Society of CPAs, September 16, 2014
- “Leading in an Era of Change” – Internal Government Presentation, August 26, 2014
- “Achieve Organizational Resilience with a Collective Heartbeat” - Christian Chamber of Commerce, October 17, 2012
- “Challenge to the CPA Profession” – Conference of National Association of State Boards of Accountancy, October 25, 2011
- “Current Status and Future for Business – Economic Update” – Portland, Oregon April 28, 2011
- “How to Identify the Right Change Approach” - January 5, 2011
- “New Venture Management” - University of Portland, Nov. 18, 2010

- “Status of Today’s Economic Situation & Strategies for Succeeding in the Near Future” – North Portland Business Roundtable, Nov. 9, 2010
- “Macro Communications for Increased Visibility” – NASBA Panel, Seattle, WA, June 11, 2010
- “Critical Information & Approaches for Decision Making” - Building Your Nonprofit In Rural Oregon Conference, BIZ Oregon, John Day, Oregon May 21, 2010
- “Gaining Strength...Preparing for the Future” – North Portland Entrepreneurs Forum, March 16, 2010
- “Charting a Course to Master the Wave” – LCEDC Business Fair, Wahkiakum, WA, April 18, 2009
- “Information is the Most Powerful Tool for Influencing Change” – Financial Executives Institute, Portland, Oregon May 15, 2003
- “How to Accomplish Change in a Bureaucratic Environment” – Dean’s Institute (Schools of Dentistry of the US and Canada), Jackson Hole, WY August 4, 2002
- “The Enron Implosion – Auditors: Victims or Accomplices” – Enron Symposium, Oregon State University April 15, 2002