

VITAE - RESUME

JOSEPH BURNETT DIEHL CPA JD

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EXPERIENCED SENIOR EXECUTIVE WITH OVER 50 YEARS OF FINANCE, ACCOUNTING, GRANT WRITING, AUCTIONEERING AND EVENT MANAGEMENT EXPERIENCE, SEEKS NEW OPPORTUNITIES CONSISTENT WITH HIS PERSONAL MISSION

EDUCATION AND PROFESSIONAL DESIGNATIONS:

- JD, the John Marshall Law School, Chicago, IL (1979)
- BS in Accountancy, Northern Illinois University, DeKalb, IL (1971)
- Graduated: Bradley-Bourbonnais Community High School, Bradley, IL (1967)
- Attorney at Law, Admitted - IL Bar on 4/26/79. Registered, IL Supreme Court #3123278
- Certified Public Accountant (CPA), Illinois (1972)
- Certificate – Missouri Auction School, St. Louis, MO (2017). *Diehl & Co. LLC has now become a licensed and bonded as an auction company in WA State #2465 and an individual auctioneer in WA State #3071; bonded by CNA Surety through 2023*
- Certificate, University of WA Law School, Professional Mediation Program (2002)
- Other Professional Designations: National CARH's *Rural Affordable Housing Professional* - 2005, Spectrum Seminars' *Continuing Certified Credit Compliance Professional (C10P)* 1998-current, and the *Shining STAR Designation (Rural Development)* 1997-current; *NAHMA and NAA's Specialist in Housing Credit Management (SHCM)* 2006;

MY PERSONAL MISSION STATEMENT AND CORE VALUES

Personal Mission: *"to inspire and empower those who share my beliefs and core values"*

My Top VIA Signature Strengths: *"Curiosity, Gratitude, Hope, Humor, Love of Learning"*

CURRENT CAREER ACCOMPLISHMENTS

Managing Member, Diehl & Co. LLC (1996-current date)

New Business Development – October 2019-October 2022: Diehl & Co. LLC is venturing into several new, exciting lines of business: live charity auctioneering (licensed and bonded); creating useful speaking engagement topics – registering with a national speaker's bureau (<https://sgspeakers.com>); now serving on two nonprofit boards - USITT Northwest Regional Section (President); Friends of Magnuson Park (Treasurer); and researching grant opportunities for nonprofit organizations which he supports. Joe also facilitates company retreats and team building events. Using his top Signature Strengths, Joe is currently enrolled in the Functional Medicine Coaching Academy in order to provide health and wellness coaching to endurance athletes. Joe has been a long-distance runner since early high school cross-country and track successes, and now competes at marathon and ultra-marathon levels. Joe recently participated in the Moab 240 (a 240 mile endurance run taking place in Utah Oct 7-11, 2022); read Joe's story here: <https://kogalla.com/blogs/news/73-year-old-joseph-diehl-outrunning-heart-disease-one-ultramarathon-at-a-time>

August 2017 to September 2019: Diehl & Co. LLC provided contract services to the National American Indian Housing Council (NAIHC) in Washington DC. With 16 years of experience working with 38 Tribes (1998-2015) in the Pacific Northwest for the Northwest Indian Housing Association (NWIHA – see below), I accepted a contract position to assist the staff at NAIHC and expand funding opportunities. My title was Deputy Director. I provided support and mentoring to the Executive Director and nine other staff persons, and was the project lead for two new organizational initiatives: (1) implementing project management software and (2) developing NAIHC’s new eLearning program. Other accomplishments:

- Conducted an intensive review of the current technology needs of the organization, and solicited four proposals from the top technology providers in the DC area.
- Took over project lead duties for the Accounting Department’s migration from a Sage software platform to a Deltek/Costpoint platform – which provided project management for NAIHC’s Training and Technical Assistance (T/TA) programs. This included interviewing and hiring technical consultants to implement the project accounting system for our T/TA Department, who carries out dozens of trainings and consulting activities with Federally-recognized Tribes annually for the US Department of Housing & Urban Development under cooperative grant agreements.
- Wrote successful grant requests providing \$1.3 million in new funding.
- Recruited over a dozen dues-paying Associate Members.
- Began the task of reaching out and building relationships with other nonprofits, foundations and corporate givers. This is an area that NAIHC has not performed well, and I’ve helped them to understand that it is through relationships, that funding partnerships are made.
- Working with the Executive Director and the T/TA Program Director, I actively participated in the process of writing responses to annual HUD Notices of Funding Opportunity (NOFAs) which provided over \$6.5 million in annual program funding for NAIHC.
- Assisted in organizing and executing six major conference events, bringing my meeting planning experience to bear. All events were highly acclaimed by the attendees based on their evaluations returned to NAIHC.
- With the cooperation of our accounting department, I filed a number of years of Indirect Cost Rate Proposals from 2013-2018, which were delinquent.
- Supported the work of the independent firm of CPAs to complete their audit of 2017 and 2018 financial statements.
- Carried out the project lead role for the creation of NAIHC’s first eLearning course, “Indian Housing Management” and the implementation of NAIHC’s first Learning Management System (LMS). Both activities were completed on September 13, 2019 (which coincided with my last day at NAIHC).

Diehl & Co. LLC Professionally Managed Three Affordable Housing Associations for 20+ Years as Diehl & Co. LLC, a Washington State Limited Liability Company

From 1996-2016, Diehl & Co. LLC has provided contract Executive Director services for three affordable housing associations in the Pacific Northwest region. These organizations represent managers, owners, tribes and housing authorities that support safe, clean and affordable housing

for low-income, disabled and elderly populations. Responsible for all program activities, outreach, education, delivery of membership benefits, conferences and trainings and other roles – as the sole staff member of these organizations. Recruit members, conduct bulk mailings, represent organization at public meetings, maintain web pages and edit content, plan and execute training and conference events, handle all administration, write and distribute industry news bulletins, and advocate legislatively and at the government agency level. Provided mediation services to members as needed. Two of these contracts ended in January 2014 and the remaining contract with the Northwest Indian Housing Association continued through January, 2017. Other activities included:

- Developed strong working relationships with member organizations and have established a reputation for effectively meeting member needs.
- Established strong working relationship with government agencies such as the US Dept. of Housing and Urban Development, Washington State Housing Finance Commission, USDA/Rural Development and the Washington State Department of Commerce, among others.
- Increased membership for all three organizations despite two recessionary cycles since 1996.
- Led two efforts to create similar organizations for AHMA and CARH in Oregon – which was accomplished in 2001-2004. Led a similar successful effort-Idaho AHMA, 2005-2006.
- Created a successful Tribal youth scholarship program, including all fund-raising. Over \$170,000 has been raised and distributed since inception.
- Set new attendance records at industry conferences and quarterly meetings.
- Single-handedly planned and executed 4 successful joint AHMA-CARH conferences from 2010 to 2013 that drew from 525 attendees to a peak of 663 attendees. All four generated substantial net revenues for the two associations.
- Developed new member resources – established and continue to maintain web sites, distributed news by e-mail, built strong liaisons with other organizations, and developed new and financially successful training programs that increased association revenues.
- Led an initiative that supported the development of 50+ computer learning centers
- Served as Interim Executive Director of the National American Indian Housing Council (for two months in 2015). Also assisted the NAIHC board and staff in 2014 with their strategic planning project in 2014.
- Instrumental in forming and maintaining an effective statewide coalition made up of diverse interests to focus on preservation – *Washington Coalition to Preserve Section 8 Housing* (now known as the *Coalition to Preserve Affordable Housing*).
- Led annual visits to Capitol Hill over the past 18 years, meeting with all eleven of Washington State’s members of Congress at least once per year.

Non-Profit Employment History (Prior to the Formation of Diehl & Co. LLC in 1996)

1993-1996 People of Color Against AIDS Network, 2200 Rainier Avenue South, Seattle WA 98144. POCAAN is the leading regional HIV/AIDS prevention education and intervention organization that targets communities of color. Served as Director of Operations, responsible for all fund raising/development, finance, personnel, facilities, logistics, and grants management. Worked closely with a very diverse community outreach staff, supporting education and outreach strategies. Reported to Executive Director. *Accomplishments - see following page.*

Accomplishments included:

- Raised over \$900,000 in new funds, primarily through grant writing.
- Developed and installed a project cost system and an indirect cost allocation system, and standardized the financial and budget reporting system.
- Implemented a 403(b)(7) pension plan for employees.
- Negotiated an increased line of credit and established a new banking relationship.
- Held three successful fund raising events.
- Developed a 5,000 name donor database for use in direct mail campaigns.

1990-1993 National Council of Real Estate Investment Fiduciaries (NCREIF), Tacoma WA (at the offices of the Frank Russell Co.), 909 A Street, Tacoma WA 98402. Served as Executive Director, the first paid staff executive officer and national spokesman for this nonprofit industry association that represents pension fund and other institutional plan sponsors and real estate managers that own/operate multifamily, R&D, retail, warehouse and office property investments. Duties included conference planning and execution, membership recruitment, publishing quarterly newsletters and administration.

- Doubled membership and tripled association gross revenues – in a period of industry decline.
- Continuously broke attendance records at association conferences.
- Expanded and improved the association's database of property performance results, and added new categories of available information.
- Hired and developed three highly capable professional staff members to support the future direction of the association as well as fully supported volunteer committee chairs.

Nonprofit Employment History

1982-1989 TCW Realty Advisors, 865 South Figueroa St., Los Angeles CA 90017.

As a Partner and Chief Financial Officer, responsible for all accounting and financial reporting for this real estate asset manager and advisor to major US pension plans. TCW managed over \$3.5 billion in commercial real estate throughout the US in targeted investment areas. The investments were held in group trusts (Realty Funds I-IV) and separate accounts for major corporate pension fund clients.

- Supervised 18-20 accounting and finance professionals, maintained general ledgers and provided published reports to 5 public realty funds and 8 private separate accounts.
- Provided clear performance reports to pension/profit sharing plan clients.
- Conducted periodic site inspections and tours of client portfolio properties.
- Automated the fund accounting department by self-developing and programming proprietary software and providing pre-prepared worksheets for the independent CPAs, substantially lowering auditing costs.
- Created financial models that facilitated the closing of 20 equity participation loans aggregating over \$300 million, and was an essential component of marketing efforts that raised over \$2 billion in new capital.

- Implemented a 70-node Novell network of personal computers – an industry first in that era.
- Served as the chairman of the Accounting Committee and later on the Board of NCREIF (which later became an employer). Successfully led an effort to standardize industry accounting procedures and policies.
- Working with our banking relationships, created a system to "sweep" client funds at the end of each day into money market funds to maximize returns.

1974-1982 Various Controller and Assistant Controller Positions, Chicago IL

Supervised accounting departments and responsible for SEC reporting for three Chicago-based REITs, a shopping center developer, and five public real estate limited partnerships in the Chicago area over this seven year period. Employers and clients included JMB Realty Corporation, Heitman Mortgage Investors, Bayswater Realty & Capital, and AIP of Illinois. Bayswater involved the hostile REIT takeover by Carl Icahn, and then leading the team to dispose of and liquidate its real estate portfolio.

1970-1974 Senior Accountant, KPMG Peat Marwick CPAs, Chicago IL

Auditing and tax return preparation for clients at the Chicago office of this CPA firm. After an internship in my last year of college, and within one year, I began running medium to large audit engagements throughout the Chicago area.

1961-1970 Variety of jobs to pay for my education: newspaper delivery, welder of highway expansion joints for Jones & McKnight Steel; stator furnace operator for General Electric (3 years); Assistant Accountant for Automatic Electric; and trip router for Standard Oil Co. cardholders.

ACTIVITIES/HONORS

- Traveled to Orissa State in India with Congressman Jim McDermott in November 2010 - a Trade Mission. Returned to India and traveled to China in Nov. 2019 for 30 days.
- Appointed by Governor Gary Locke in 2001 to serve on the Affordable Housing Advisory Board (AHAB), which advises the governor on the state's affordable housing initiatives. Re-appointed by Governor Gregoire in 2005. Term limit resignation in 2009.
- National speaking engagements, including the 2002 Low Income Housing Tax Credit Symposium in New York; and HUD's 1999 Best Practices and Technical Assistance Symposium in Kansas City (among others). As a part of my current association management role, I speak publicly at every conference and training event that I organize.
- Member of various professional organizations such as the American Institute of CPAs, American Bar Association, Northwest Development Officers Association, Society of Government Meeting Planners, World Affairs Council, Illinois CPA Society, and others.
- Hobbies/Interests: singing; earned private pilot's license in 1993 (single engine, land); completed 308 sport skydives from 1987-1991; vacationed extensively overseas since the 1990's including trips to China, Spain, Belize, Hong Kong, Singapore, Australia, India, Mexico, Venezuela; completed 16 marathons, including a personal best of 3 hrs. 31 minutes. I was just selected to run a 240 mile ultra marathon in Utah in October, 2022.
- Freelance Author, *Fast Thinking Magazine*, Sydney Australia - article, "From Chippy to Green Building Pioneer," July 5, 2010.
- Author, "The Russell-NCREIF Property Indices: Institutional Real Estate Performance Benchmarks," *Journal of Real Estate Literature*, 1:95-103, American Real Estate Society (1993); Kluwer Publishers, The Netherlands.

- Consulting Editor, *Handbook of Real Estate Portfolio Management*, R. D. Irwin, 1995.
- President (2001-2006; 2008-2010), Digital Promise, a statewide non-profit seeking to bridge the digital divide in affordable housing communities. Served as a volunteer board member since its inception during the 1990's.
- President, Pacific Northwest Chapter of the John Marshall Law School Alumni Association; member of the Board of Directors of the law school's Alumni Association, headquartered in Chicago IL.
- Board of Directors (2004-2007), National Neighborhood Networks Consortium, Washington DC. This national organization seeks to connect residents of low income housing communities to technology.
- Assisted in the formation of a political action committee (PAC) for affordable housing (2006).
- Assisted in forming the Insurance Program for Association Housing LLC (IPAH) which has enrolled over 1,000 properties (insuring over 35,000 units), saving tens of thousands in premiums per year.
- Assisted in creating five live-streamed online trainings for members of two statewide associations... before the pandemic.
- Captain, high school cross country team – and won the first “Top Runner Award” (1966).
- Set high school record in the mile run 4 minutes and 31 seconds (1967) and set a long-standing school record in the mile relay with three other sprinters (1967).
- National Honor Society – high school (1964-1967); first chair, trombone – high school band.
- Graduated Missouri Auction School in January 2017. Ran four successful live auctions in January, March, April 2017 and January 2020, and launched a new, successful avocation thereafter. Became a licensed Auctioneer in the state of Washington and Diehl & Co. LLC became a licensed Auctioneering company in that state, as well (2017-2023).
- Raised \$1,600 for the NWIHA Youth Scholarship Program via a 50-mile ultra-marathon in March 2020. Due to COVID-19, the race was cancelled – and the funds were donated with a promise by Joe to run the race after the pandemic.
- Joined and participated in four National Auctioneer Association conferences, and was an entrant in two International Auctioneer Championship (IAC) competitions.
- Philanthropy Department Volunteer with Seattle Goodwill – two days per week to provide donor research services (Pro-Bono). Began service in 2016 which continued through 2021.
- Quilteute Housing Authority – Volunteer Fund Raising and Consulting Role (Pro-Bono) in 2016.
- Member – FAR (Financial and Administrative Roundtable), in Washington DC from 2017-2019. Provided support for the training committee that offered breakfast roundtables at nonprofit organization offices. Referred vendors to membership opportunities.
- Attended three recent American Society of Association Executive conferences in Toronto, Chicago and Columbus, 2017-2019. Planned but did not attend the August 2020 event.
- Attended four recent USITT national conferences 2016-2019, and in 2022. USITT is an international nonprofit membership association for practitioners in the performing arts and entertainment arena - my hobby. The 2020-2021 conferences were not held “live.”
- Became USITT Pacific NW Regional Section President in June 2020 for a two-year term.
- Engaged and registered my talents at a national speaker's bureau, SG Speakers in San Diego. This allows me to share my personal mission with others.
- Re-elected Precinct Committee Officer (PCO) in 2020, 46th District of Seattle (46-2378).

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