

# Tamara Bates

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## EDUCATION

**Tufts University** | Medford, Massachusetts

M.A., Urban & Environmental Policy & Planning (UEP), Child Development

May 2002

Thesis: *Integrating Research, Theory, and Practice in Applied Child Development*

Awards and honors: Robert P. Guertin Student Leadership Award.

**College of Santa Fe** | Santa Fe, New Mexico

May 1999

B.A., Psychology, *Magna Cum Laude*

Awards and honors: Pedro de Peralta Award for Service to the Community.

## PROFESSIONAL EXPERIENCE

Currently an advisor to the Santa Fe Indigenous Center, the New Mexico Environmental Law Center, and Teach for America, NM on development strategies. Founder of The Dots Between virtual fellowship for artists on financial wellness.

**UBS Financial Services** | Santa Fe, New Mexico

June 2015 – May 2019

*Financial Advisor*

- Worked with business owners and nonprofits on company retirement plans; financial planning; portfolio management, insurance, lending and coordination with tax and legal experts
- Managed over +\$160 million of client assets, with tailored portfolio and tax planning solutions
- Obtained Wealth Advisor™ and Chartered Retirement Plans Specialist® designations as well as Series 7 & 66 licenses

**Innovate+Educate** | Santa Fe, New Mexico

Dec. 2009 – Dec. 2011

*Vice President of Strategy and Programs*

- Oversaw the NM STEM (Science, Technology, Engineering and Math) Network; developed organization's first business plan
- Wrote and produced publications and website; supported individual and corporate fundraising.
- Organized the NM Society for Technology in Education Annual Conference
- Designed a STEM afterschool program for homeless students and produced a national toolkit

**Santa Fe Waldorf School** | Santa Fe, New Mexico

Oct. 2007 – June 2009

*Development Director*

- Executed all fundraising activities for this preschool-12th grade school of 275 students: doubled parent giving to the Annual Fund in one year
- Instituted grant writing programs, as well as individual donor development and special events
- Produced the school's first Annual Report and supervised other core school publications

**Schott Foundation for Public Education** | Boston, Massachusetts

Jan. 2002 – June 2005

*Program Associate*

- Oversaw early care and education grant making for universal preschool legislation
- Wrote publications on leadership and early education
- Organized policy, diversity and leadership meetings with significant program and policy leaders across Massachusetts
- Consultant for the Schott Fellowship, a one-year program focused on enhancing the policy skills of early childhood education leaders; assisted in program design, implementation, outreach to candidates across Massachusetts, publicity, candidate selection, organizing policy forums, and grant writing

## CONSULTING EXPERIENCE

### **Youth Media Project** | Santa Fe, New Mexico

July 2012 – April 2014

#### *Development Consultant*

- Tripled annual campaign and gifts from major donors, awarded two National Endowment for the Arts awards, expanded board and substantially increased grant funding

### **The Santa Fe Institute** | Santa Fe, New Mexico

Aug. 2011 – Feb. 2012

#### *Constituent Relations Consultant*

- Oversaw direct mail campaigns; managed volunteer program; produced fundraising brochures; organized special events
- Executed programs through Raiser's Edge software solution

### **Southwest Creations Collaborative** | Santa Fe, New Mexico

Sept. 2006 – May 2009

#### *Development Consultant*

- Planned and executed annual fundraising campaigns
- Produced annual Holiday Party and policy leader luncheons

### **The Lee Academy Pilot School** | Dorchester, Massachusetts

Jan. 2004 – June 2006

#### *Development Consultant*

- Grant writing and individual donor development; raised over \$350,000 in foundation and individual donors in this school's first two years of operation

## PUBLICATIONS

- *STEM Education for Homeless and At Risk Students*. Bassuk, E., Bates, T, Beach, C.A., Murphy, C. (2011). [The National Center on Family Homelessness](#).
- *Early Care and Education Funding in Massachusetts*. Lippitt, J., Bates, T. & Washington, V. (2004). [The Schott Center](#).
- *Leadership Pathways for Early Education: Community Strategies to Enhance Professional Development*. Washington, V, Bates, T. & Mayberry-Dunn, T. (2003) [The Schott Foundation and Schott Center](#).

## COMMUNITY LEADERSHIP & VOLUNTEERISM

- National Advisory Council, Creative Capital 2021
- City of Santa Fe Arts Commissioner, appointed February 2020
- Los Alamos National Laboratory Foundation, Board Member, 2018-2020
- Southwest Creations Collaborative, Board Member, 2017- current
- Presented financial literacy workshops in 2018-2019 to students at the Santa Fe Indian School, Wings of America mentors and Meow Wolf program leaders
- Co-Chair, Art for Change event with the Santa Fe Art Institute 2019
- Founder of Power Gals- a monthly leadership group made up of professional women in their 30s and 40s
- Performance Santa Fe, Education Committee, 2018-current
- Participated in the Rockwood Leadership Training for Executive Leaders in Philanthropy 2012
- Selected as one of five new leaders in philanthropy by the Associated Grantmakers of Massachusetts