



KATIE S. ELLIS

Principal
KSE Advisory Group
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Experienced professional with a strong track record in advancing corporate social responsibility across both for-profit and nonprofit sectors. Proven success in developing and leading initiatives in charitable giving, community engagement, fundraising, and volunteer programs. Skilled communicator with expertise in strategic planning, relationship management, and operational oversight. Committed to integrity, excellence, and building meaningful, mission-aligned partnerships.

Professional Experience

KSE Advisory Group

Principal

June 2023 - Present

- Provides consulting and advisory services to clients, specializing in the development and implementation of sustainable CSR strategies.
- Offers expertise in enhancing community engagement efforts, optimizing philanthropic initiatives, and aligning business objectives with social impact goals.
- Experienced in managing charitable giving programs, contributing to successful fundraising and grantmaking initiatives.
- Proficient in building and maintaining relationships across sectors, facilitating collaboration to achieve common goals, and uniting stakeholders to benefit community and business.
- Most recently, served as Interim CEO of Make A Wish Orange County & Inland Empire.

Genesis for Good Foundation, Genesis Bank

Executive Director and President

October 2021 – May 2023

- Established a 501(c)3 public charity aligned with Genesis Bank, a diverse, multiracial Minority Depository Institution (MDI), one of only two in the country.
- Developed and communicated a strategic plan aligned with Genesis Bank initiatives.
- Strategized with Bank executives to build out a nonprofit banking division business.
- Created and implemented an internship program focused on students from diverse backgrounds.
- Established "Rounding for Good," a donation platform for clients to participate in philanthropic giving.
- Represented Genesis for Good Foundation and Genesis Bank in the community, promoting the mission and work within the region, amplifying the business of doing good benefits the for-profit and non-profit sectors.
- Hosted municipal and community "roundtables" to create partnerships.
- Organized and oversaw monthly company volunteer events.
- Served on the Diversity, Equity, and Inclusion strategy committee.

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Professional Experience Continued

Kilimanjaro Foundation, Belay and Associates

Executive Director

April 2020 – October 2021

- Consulted for Belay and Associates in the development of the Kilimanjaro Foundation in preparation for an IPO.
- Built out giving strategy, vision, and design options for website and collateral materials.
- Participated in weekly board calls to manage the process and documentation.

Opus Community Foundation, Opus Bank

Executive Director and Board Member

December 2010 – July 2020

- Designed and implemented all charitable giving and employee engagement programs since Opus Bank's inception.
- Determined philanthropic opportunities aligned with Opus Bank branding and business goals.
- Facilitated relationships between stakeholders to increase involvement in charitable causes.
- Managed Foundation Board and corporate governance of philanthropic efforts.
- Administered \$5.2 million budget, annually distributing an average of \$700,000 through grants and matching gifts.
- Developed corporate communications highlighting Foundation and corporate philanthropic efforts.
- Oversaw accounting, budgeting, internal audits, CRA reporting, tax preparations, and filings.
- Launched a customized software platform to increase volunteer events and generate detailed CRA reports.
- Developed and implemented a corporate social responsibility program that elevated Opus Bank's reputation.
- Achieved an "Outstanding" rating on the 2018 FDIC Community Reinvestment Act exam.
- Received the "Civic 50" award in its inaugural year and every subsequent year.

Hoag Hospital Foundation

Manager, Major Gifts

January 2007- December 2010

- Collaborated with the development team to raise significant funds.
- Served as the primary liaison between campaign directors, major donors, and medical leadership.
- Contributed to high-level donor engagement strategies and solicitations.
- Oversaw a prospect portfolio of 700 donors.
- Brought in over 100 new prospect relationships and nearly \$1 million in support.
- Coordinated events and wrote proposals, strategies, and communications.

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Education

University of California, Irvine, Paul Merage School of Business

Master of Business Administration

March 2008 – June 2010

- Member of the Distinguished Student Program

University of California, Los Angeles

Bachelor of Arts, Communications

August 2000 – May 2004

- Member of Phi Beta Kappa, Academic Honors Society
- Magna Cum Laude Honors

Professional Affiliation

President, Orange County Grantmakers, 2019; Vice President, 2018; Committee Chair, 2015 – 2017

Former Vice President, Treasurer and Member of OC Community Relations Council

Former Member, OC Opportunity Initiative Executive Committee and Strategy Team

Former Member, OC Census & Grant Committee