



Professional Experience

Appalachian State University, Boone, North Carolina

Vice Chancellor of Finance and Operations: 2022 to Present

Serve as the University's Chief Financial Officer, leading its' financial, business, and operational functions (including management oversight of capital projects and facilities) across multiple sites. In this role, I am the chief advisor to the Chancellor and University Board of Trustees on financial, business, and operational matters as well as the University's primary business and finance liaison to the University of North Carolina (UNC) System Office and UNC Board of Governors. Provide proactive, strategic advice to the Chancellor, Board of Trustees, and other senior University leadership regarding the achievement of the University's mission through its financial and physical resources. Oversee the preparation of the University's annual financial statements and ensure that accurate financial and related information are provided to the Chancellor and members of the administration to make informed decisions and select appropriate courses of action. Also responsible for the development and implementation of the University's annual operating and capital budgets as well as debt management and capital finance.

Responsible for a staff of 530 employees across the Division of Finance and Operations, which includes the areas of Finance and Administration (Budget Office, Business Systems, Controller, and Materials Management), Facilities Management (Facilities Operation, Planning Design & Construction, and New River Light & Power which provides power to the campus and local community), Campus Services (Dining, Bookstore, Parking and Transportation, Campus Post Office, and Conference Services), Human Resources, and Special Projects. In addition, I serve on the Appalachian State University Foundation Board of Directors and am currently President of the Appalachian Real Estate Development Corporation and serve on its' Board of Directors. Page 2

Cornell College, Mount Vernon, Iowa

Vice President, Chief Financial & Chief Operating Officer and Treasurer: 2020 to 2022

Served as the chief advisor to the President and the Cornell College Board of Trustees on all financial and operational matters, with a focus on maintaining long-term financial sustainability for the College and on building and maintaining efficient and effective operational processes that ensure that related functions and activities operate at an optimal level. This included oversight of the College's cash, risk, and debt management operations. Also oversaw the Division of Business and Enterprise Services, one of the three main organizational divisions within the College, which includes Alumni and College Advancement, Business and Financial Services (including Capital Finance), Facilities Services (including Capital Projects and Construction Management), Human Resources, Information Technology (including all enterprise systems and data operations), and the Office of Marketing and Communications.

Management responsibilities also included chairing the College's Planning, Budgeting, and Evaluation Committee, which guides the development of the College's annual operating budget and monitors its status and execution throughout the fiscal year, including its linkage with and support of the College's recently completed strategic plan. Additionally, served as a core member of the President's Council which sets policy and strategic direction for the College and on various other standing and ad hoc College governance and operational committees (e.g., IT Governance).

Interacted frequently with the College's Board of Trustees, and in particular the Board's Financial Affairs Policy Committee, Investment Committee (which oversees the College's endowment portfolio), and Audit and Assessment Committee. Also served as the College's representative on financial and operational matters to the Iowa Association of Independent Colleges and Universities and the Associated Colleges of the Midwest and interacted with governmental agencies on financial and operational matters of mutual interest.

Louisiana State University, Baton Rouge, Louisiana

Executive Vice President and Chief Financial Officer: 2017 to 2020 Vice President for Finance and Administration/Chief Financial Officer: 2014 to 2017

Served as the chief advisor to the President and the LSU System Board of Supervisors on all financial, operational, and administrative matters, and worked collaboratively with key internal and external constituencies across the state to set forth and achieve the University's strategic, financial, operational goals. Provided financial, operational, and administrative oversight for the statewide operations of the LSU System (\$2.3B budget; 6,100 employees), which includes the flagship campus in Baton Rouge, the Health Sciences Centers in New Orleans and Shreveport, regional campuses in Alexandria,

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Eunice, and Shreveport, the Agricultural Center (Extension Services), and the Pennington Biomedical Research Center. Simultaneously served as the CFO for the Baton Rouge campus (\$1.1B budget; 3,600 employees) which includes direct responsibility for the following operational areas (1,000 employees in total): Accounting Services (including Capital Finance), Auxiliary Services (including the Bookstore, Campus Dining Services, Residential Life, and the Student Union), Budget & Planning, Facility and Property Oversight, Human Resource Management, Information Technology Services, Procurement & Property Management, Public Safety (including the LSU Police Department), and Risk Management.

Served on executive level committees at the statewide and campus level and as the University's liaison to the Louisiana Board of Regents, LSU Foundation, the Alumni Association, and the Tiger Athletic Foundation on financial and operational matters. Also served as an ex-officio board member of the LSU Real Estate and Facilities Foundation (*an entity I was involved in creating for the purpose of facilitating public-private partnerships across the LSU System*). Interacted frequently with other state higher education entities, governmental agencies, and elected and appointed officials at the federal, state, and local level, as well as with community-based organizations such as the Baton Rouge Area Chamber and Baton Rouge Area Foundation.

Louisiana State University Foundation, Baton Rouge, Louisiana

Interim President and CEO: January 2017 to July 2017

As a direct report to the LSU Foundation Board of Directors, served as the interim chief advancement officer for the University. Worked collaboratively with the LSUF Board of Directors, University leadership, the Tiger Athletic Foundation, LSU Alumni Association, and other University foundations/support organizations to further the University's overall development goals and objectives. Provided leadership and oversight to the over 100 advancement professionals and support staff in the LSUF central office and distributed development offices.

Illinois State University, Normal, Illinois

Vice President for Finance and Planning: 2009 to 2014

Reporting directly to the President, served as the University's Chief Financial Officer and Treasurer, with oversight of all financial and operational matters. Specific responsibilities included:

• Leading long-range financial planning, cash management and treasury operations, risk management, internal controls, capital financing and debt management, and public-private partnerships;

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- Leading and facilitating the development and implementation of resource allocation processes through a \$400+ million annual operating budget;
- Providing leadership to the Division of Finance and Planning which encompasses a staff of approximately 700 across the areas of administrative technology; planning, budgeting, and institutional research; accounting and financial services; procurement; human resources; facilities planning and management; energy management; and parking & transportation; and
- Coordinating the University's legislative strategy and response in matters related to the state budget and substantive legislation of interest before the General Assembly.

Worked closely with the General Assembly, the Governor's Office, Illinois Board of Higher Education, other State agencies, local government officials, and representatives of other internal and external constituencies in matters of operational and strategic importance to ISU.

Selected Activities and Accomplishments:

- Provided leadership and oversight to multi-faceted/multi-year administrative information technology modernization effort
- Led financing and construction of the College of Nursing Clinical Simulation Lab
- Led creation of ISU's first public-private partnership (\$59.6 million student apartment complex)
- Led financing for an \$8.5M energy savings/performance contract project
- Led financing and construction of Hancock Football Stadium renovation (\$26M)
- Successfully negotiated several strategic real estate acquisitions
- Partnered with the Town of Normal on a plan to relocate the University Art Galleries to Uptown Station

University of Illinois, Urbana, Illinois

Associate Vice President for Planning and Administration: 2008 to 2009 Assistant Vice President for Strategic Planning and Policy Analysis: 2005 – 2008

Provided leadership in various areas including: conceptualizing and developing University strategic planning processes and overseeing related activities to support strategy implementation, execution, and evaluation; oversight and management of various administrative and business functions conducted by the University Office of Planning and Administration units; and conceptualizing, developing, and implementing initiatives in response to University planning, budgeting, and operational priorities.

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Illinois Board of Higher Education, Springfield, Illinois

Deputy Director for Planning and Budgeting: 2002 – 2005 Deputy Director for Planning and Technology: 2001 – 2002

Provided leadership and counsel in planning, budgeting, policy development, and policy implementation for the Board of Higher Education. Selected specific responsibilities included:

- Leading the ongoing development and implementation of the Board's statewide master plan for higher education and the assessment of institutional connections to the plan's goals and objectives;
- Leading the development of the Board's annual budget recommendations for higher education operations, grants, and capital improvement projects to be submitted to the Governor and General Assembly;
- Working with staff in the Governor's Office and General Assembly to provide information regarding budget- and policy-related issues; and,
- Continuing development of the Board's information systems to inform policy decisions more effectively.

MGT of America, Inc., Tallahassee, Florida¹

Partner: 2000 – 2001 Principal: 1997 – 2000 Senior Associate: 1997

Provided advice, consultation, and implementation assistance to a wide variety of clients on higher education-related issues in the following areas:

- Organizational and management reviews
- Enrollment management and strategic market research studies
- State, system, and institutional financial planning and analytical studies
- State- and system-level planning and policy studies
- Campus facilities master planning
- State- and system-level funding models for public colleges and universities
- Regional and community academic program needs assessments

Consulted with state coordinating boards, system offices, state legislatures, individual institutions, and higher education associations in many states across the U.S. and one foreign country (*a listing of my clients is available upon request*). In addition to

¹ MGT is a national firm that delivers a full spectrum of strategy, business, and operations consulting services to a wide range of public sector groups, agencies, and institutions (<u>www.mgtconsulting.com</u>).

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consulting activities, I was responsible for new business development, client relations, and supervision of higher education practice area professional staff.

University of Wisconsin System Administration, Madison, Wisconsin

Director, Office of Policy Analysis and Research: 1994–1997 Senior Policy and Planning Analyst: 1993–1994 Policy and Planning Analyst: 1992–1993

Provided direction and supervision to the UW System's Office of Policy Analysis and Research, which included the conceptualization and generation of policy-relevant research and information for the UW Board of Regents, System officers, campus administrators, and external constituencies.

Arizona Joint Legislative Budget Committee, Phoenix, Arizona

Higher Education Research/Fiscal Analyst: 1991 – 1992

Designed and conducted studies on specific higher education policy issues in response to the needs of the members of the Arizona Legislature. Analyzed annual operating budget requests from the public universities and community college system and developed budget recommendations for consideration by the Legislature. Prepared fiscal notes regarding specific legislation introduced by members of the Legislature.

Illinois Board of Higher Education, Springfield, Illinois

Assistant Director for Fiscal Affairs: 1988 – 1991 Research Associate: 1987 – 1988

Analyzed and developed recommendations regarding the annual operating budget requests from the Illinois Student Assistance Commission, State Universities Civil Service System, and State Universities Retirement System. Administered the Board's formula grant programs for public and non-public institutions of higher education. Designed and conducted ad hoc policy studies on a variety of topics. Page 7

Teaching, Service, and Other Appointments

SHEEO/Lumina Foundation Academy for State Policy Leadership in Higher Education

Selected as Academy Fellow: 2012

North Central Association - Higher Learning Commission

Consultant-Evaluator, HLC Peer Review Corps: 2006 to 2009

National Center for Public Policy and Higher Education Selected as a National Center Program Associate: 2003 – 2004

University of Illinois at Urbana-Champaign

Adjunct Faculty Member, Graduate Program in Higher Education: 2001 – 2002

Florida State University, Tallahassee, Florida

Adjunct Faculty Member, Graduate Program in Higher Education: 1998 – 2000

University of Wisconsin, Madison

Adjunct Faculty Member, Graduate Program in Higher Education: 1994 – 1996

<u>Education</u>

Florida State University, Tallahassee, Florida Ph.D., Higher Education Administration with a minor in Public Administration,

University of Illinois at Urbana-Champaign

A.M., Labor and Industrial Relations,

Illinois College, Jacksonville, Illinois

B.A., Economics and Business Administration with concentrations in English and Speech Communications/Theater,

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Selected Community/Volunteer Activities

Board Member – Illinois College Alumni Association Board of Trustees, Jacksonville, Illinois

Parent Volunteer:

- Central Catholic High School, Bloomington, Illinois
- Sacred Heart-Griffin High School, Springfield, Illinois
- St. Agnes Elementary School, Springfield, Illinois
- Hawks Rise Elementary School, Tallahassee, Florida

Board Member/Treasurer – Meeting House Preschool, Madison, Wisconsin Member of Trustee Scholarship Review Panel, Illinois College, Jacksonville, Illinois Lector – St. Agnes Catholic Church, Springfield, Illinois

Selected Presentations and Publications

Available upon request.

<u>References</u>

Available upon request.