

### **Summary of Qualifications**

- **Institutional Knowledge:** Twenty-eight years focused on improving enterprise-wide finance and administration at the University of Louisville. Deep understanding of the University's history, governance, key state government stakeholders, and organizational culture.
- **Domain Expertise:** Thorough understanding of the complex model of financial and administrative operations required to effectively oversee enterprise governance, risk management, and compliance for the University of Louisville and its corporate affiliates.
- **Commitment to the University of Louisville's Mission:** Essential historical perspective on the University's evolution and deep commitment to assisting the University's executive Leadership achieve its strategic mission.
- **Finance and Administrative Operations:** Proven record of visionary leadership across the financial and administrative operations which effectively support the University's academic and research mission.

### **Education**

- **Master of Science,** Finance, Northern Illinois University, 1986
- **Bachelor of Science,** High Honors, University of Louisville, Business Administration and Finance, 1984

### **Professional History**

#### ***UNIVERSITY OF LOUISVILLE, LOUISVILLE, KENTUCKY***

**Interim Chief Financial Officer** (January 2017 – Present) and (September 2013 – January 2015)

Serve as the University's highest-ranking financial executive and provide both strategic and operational financial support to the University's President, Provost, Board of Trustees and other institutional leaders.

- Responsible for the integrity and leadership of the enterprise-wide budgeting, accounting, payroll, and student financial services for the University and its corporate affiliates.
- Provide leadership and direction for the following offices: Office of Budget and Financial Planning, Controller's Office, Bursar's Office, Payroll, Position Management, Human Capital Management Systems, and Financial Systems.
- Oversee traditional financial infrastructure for the University and support the instruction, research and public service missions by providing cash management and treasury operations, the administration of investments, accurate and timely financial reporting, expenditure control and a full array of other financial services.

### Major Accomplishments:

- Works directly with the University's Executive Leadership team in setting the financial management strategy for the University. This includes managing the preparation, implementation, and oversight of the University's \$1.2 billion operating budget, overseeing complex financial analysis, and planning in support of major University financial decisions.
- Created successful financial strategies for absorbing \$61.5 million in reduced state appropriations in the past fourteen years.
- Created model for campus-wide voluntary separation program resulting in \$7.5 million in permanent savings over a five-year period.
- Strategically and operationally lead a comprehensive transformational multi-operational business process and system redesign initiative currently underway at the university:
  - In partnership with Contract Administration and Procurement Service examining the entire procure-to-pay lifecycle.
  - In partnership with Audit Services, completed a risk assessment of social security numbers usage across the entire campus.
  - In partnership with Vice Provost for Faculty Personnel, Vice Provost for Institutional Research, and Vice President for Human Resources examining the entire employment lifecycle to gain administrative efficiencies and improvements.

### **Vice Provost and Chief Budget Officer (March 2016 – Present)**

Serve as the University's highest-ranking budget official. In this capacity,

- Key advisor to the President and an integral member of the university's Executive leadership teams of both the President and the Provost
- Provides budgetary guidance and consultative advice to key senior leaders of the University, fostering a collaborative approach to budgeting and financial planning.
- Strategic oversight of the university's \$1.2 billion annual operating and capital budget and for the creation of policies, procedures and strategies in financial planning.
- Coordinates and implements budgetary and financial issues/decisions with academic units across all campuses
- Strategic oversight of all business operations for the University's Executive Administration.

Other Positions Held:

**Associate Vice President for Finance and Business Affairs** (September 2013 – March 2016)

**Director, Office of Budget and Financial Planning** (2003 – August 2013)

Served as the University's most senior budget and financial executive and led the Office of Budget and Financial Planning (formerly the Office of Planning and Budget).

- Responsible for all aspects of strategic and operational financial planning, budgeting, financial analysis, position management, regulatory reporting, management reporting and analyses to assist the University accomplish its strategic mission and goals. Specific duties and responsibilities included the following:
  - Preparation of the University's annual operating budget, and the operating budgets for the various affiliated corporations,
  - Special staff to the University President and Provost for budgetary and financial planning matters,
  - Primary liaison with the University community, the Kentucky Council on Postsecondary Education, and the Governor's Office of Policy and Management regarding the operating budget and other high-level financial matters,
  - Active member of statewide Chief Budget Officers organization that involves state policy discussions on matters of higher education finance and college affordability,
  - Drafting University-wide policies and providing specialized financial reports and executive summaries to the President's Leadership Team, the Board of Overseers and to the Board of Trustees,
  - Developing automated approaches to streamline business-related processes,
  - Managing and actively participating in team projects such as the development of the Biennial Budget Request to the Commonwealth of Kentucky, the preparation of external reports to accrediting and governmental agencies, UofL's enrollment projection model, and numerous special projects,
  - Provide day-to-day leadership for the University's budget and financial staff, and
  - Monitoring and managing the University's Unexpended Capital Plant fund.

**Assistant Director, Office of Planning and Budget**, (1999-2003)

**Senior Policy and Budget Analyst, Office of Planning and Budget**, (1998-1999)

**Policy and Budget Analyst III, Office of Planning and Budget**, (1995-1998)

**Policy and Budget Analyst II, Office of Planning and Budget**, (1991-1995)

**Policy and Budget Analyst I, Office of Planning and Budget** (1989-1991)

***MATRANS CONSTRUCTION, MADISON, INDIANA***

**Controller (1987 - 1989)**

Responsible for standard and cost accounting, computer software maintenance, accounts payable, payroll, general ledger and job costing. Implemented a computerized system for payroll, job costing, accounting and financial analysis.

***VHA PHYSICIAN PLACEMENT AND CONSULTING SERVICES, LOUISVILLE, KENTUCKY***

**Consulting and Financial Analyst, (1986 - 1987)**

Performed statistical analysis and compiled data and reports for consumer survey studies, medical staff development plans and medical practice evaluations. Also responsible for standard accounting procedures, budgeting process, variance analysis, management of bank balances and short term money management.

**Information Technology Skills**

Significant experience in designing and implementing technology systems for business applications focused on financial, budgetary and position management systems. Examples include the *PeopleSoft / Oracle Financials ERP, Budget Preparation System, Position Management System, Operating Budget Interfaces with Payroll and Financial systems, and Electronic Budget Transfer system*, all implemented at the University of Louisville.

**University Committees and Activities**

Served on or led numerous university-wide committees and functional work groups including:

- University of Louisville Athletics Association (2013 - Present)
- University of Louisville Research Foundation, Inc. (2013 - Present)
- Board Member and Treasurer, the Quality and Charity Care Trust (2013 - Present)
- University-wide Budget Advisory Committee, ex-officio (1996 – Present)
- University of the 21<sup>st</sup> Century (2012 - Present)
  - Financial Health Committee
  - Administrative Efficiencies Committee
- Chair, University-wide Service Center Committee (2011-Present)
- Athletic Student Financial Aid Committee (2000 – Present)
- Grawemeyer Award Executive Committee (2003-Present)
- Compliance Oversight Committee (2013-Present)
- Strategic Technology Executive Committee (2013-Present)
- Task Force on Tuition and Fee Setting (TFT&FS), Chair and Co-chair (2002 – Present)
- Faculty Senate Budget and Planning Committee, ex-officio (2002 - Present)
- University Policy and Program Development Committee, ex-officio (1995-2002)

- Departmental Management System Advisory Committee (1995-2003)
- Leadership and Implementation Team – Unit Business Managers Certification Program (2009 – Present)

### **Regional and Statewide Committees**

Served on several statewide committees and functional work groups including:

- Council on Postsecondary Education Statewide Funding Model Task Force, 2013 - Present
- Council on Postsecondary Education Chief Budget Officers Group, 1998 – Present
- Council on Postsecondary Education Task Force on Financial Reporting, 1998

### **Teaching Experience**

Guest Lecturer - College of Education and Human Development, University of Louisville. Subject areas were Resource Allocation, Strategic Planning, Linking Budgeting to Planning, Comparative Budgeting Techniques, Formula Funding, and Decision-making Processes for Higher Education.

### **Professional Associations**

- Southern Association of College and University Business Officers (SACUBO)
- National Association of College and University Business Officers (NACUBO)