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HIGHLIGHTS

- Higher education consultant and administrator with 30 years of experience
- Founder and Principal of higher education and NPO consulting firm RPM Associates
- Served as Interim Vice Provost for Academic Budget and Planning, Portland State University
- Core member of team which developed Global Innovation Exchange with University of Washington, Tsinghua University and Microsoft
- Author of the book *Budgeting for Not-for-Profit Organizations*, published by John Wiley & Sons
- Adjunct faculty member, Belmont University and University of Washington

SUMMARY OF EXPERIENCE

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| Resource Planning and Management Associates, LLC <i>Principal and Owner</i> | Nashville, TN <i>April 2000 to present</i> |
| NACUBO Consulting <i>Consultant</i> | Washington, DC <i>March 2021 to present</i> |
| Portland State University <i>Interim Vice Provost for Academic Budget and Planning</i> | Portland, OR <i>July 2019 to April 2021</i> |
| University of Washington, Global Innovation Exchange <i>Chief Operating Officer</i> | Seattle and Bellevue, WA <i>September 2015 to January 2018</i> |
| KPMG Higher Education Consulting <i>Manager</i> | Nashville, TN <i>September 1996 to March 2000</i> |
| University of Chicago <i>Deputy Director, Office of Budget and Financial Planning</i> <i>Senior Analyst, Human Resources</i> | Chicago, IL <i>July 1995 to September 1996</i> <i>February 1993 to June 1995</i> |
| Vanderbilt University Human Resource Services <i>Manager of Administrative Services</i> | Nashville, TN <i>June 1990 to January 1993</i> |

EDUCATION

Amherst College, Amherst, MA
B.A., Music, 1982

University of Chicago, Chicago, IL
A.M., General Studies in the Humanities, 1984

Vanderbilt University, Nashville, TN
Master of Business Administration, 1991

Portland State University, Portland, OR
Doctoral student, Public Affairs and Policy (started October 2020)

DETAILED EXPERIENCE

Principal, Resource Planning and Management Associates, LLC

April 2000 to present

Founded RPM Associates, a consulting firm serving higher education and nonprofit clients in the areas of budgeting and financial planning, new business planning, administrative processes and organization, and capital projects management.

- Budget-related projects: worked with institutions adopting Responsibility Center Budgeting; refined existing allocation systems; developed cost allocation and faculty and enrollment models to support decision-making, funding distribution, cost recovery, and scenario planning; conducted policy and benchmarking studies of funding and allocation policies, governance, and costs.
- Administrative process and organization projects: in-depth work on Information Technology, Human Resources, Student Services, and Financial Management. Addressed centralization/decentralization issues such as Shared Service Centers and unit consolidation.
- New business planning and execution: innovation education and promotion, global partnership (Global Innovation Exchange), and Competency-Based Education and on-line learning.

Notable clients and projects

- University of Washington: core member of team which built and implemented the Global Innovation Exchange program (see below); development and implementation of activity-based budgeting model; assessment of financial management in Capital Projects Office.
- Tsinghua University (Beijing, China): Advise on North American operations, including securing State of Washington authority to operate, program planning, financial model, and facilities development planning. A major responsibility was reconciling Tsinghua and Chinese policies and practices with operating requirements in the U.S.
- Washington University in St. Louis: reviewed balance between centralization and decentralization in institutional budget model; evaluated budget options and financial strategy for School of Engineering and Applied Science; conducted comprehensive review of organization and management of Information Technology resources, including management structure and funding models; facilitated internal group assessing Shared Service models.
- University of California: supported budget model reviews and implementation of more decentralized and transparent allocation models in independent projects at four campuses—Berkeley, Santa Cruz, Davis and Irvine; roles ranged from providing industry context to framing institutional review, development of allocation models, analysis of alternatives, assessment of staff work, collection of campus input, and communications; facilitated internal working groups. Also conducted an assessment of administrative costs in student services organization at UC Irvine.
- Iowa State University: assessment of readiness for transition to Responsibility Center Budgeting model; Three-year assessment of RCB model.
- New Mexico State University: leading team to assess budget for central Information Technology organization and develop 5-year financial model, advising group evaluating institutional budget design.
- Brookings Institution: reviewed budgeting practices, proposed new policies and process for budget development, a new institutional budget model, revised authority structures and incentives, a complete set of reporting formats, and accounting requirements to support new models.
- Small institutions (Philadelphia University, University of Redlands, Morehouse School of Medicine, and Fort Lewis College): developed decision support models based on program costs and faculty utilization; used for scenario planning, setting unit goals, and guiding allocation of faculty resources.

Partial client list

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| Bellarmino University | Tsinghua University (China) |
| Brandman University | Tulane University |
| The Brookings Institution | University of Alaska |
| Catholic University of America | University of British Columbia |
| Creighton University | University of California, Berkeley |
| Fort Lewis College | University of California, Davis |
| Goshen College | University of California, Irvine |
| Humboldt State University | University of California, Santa Cruz |

Iowa State University
Long Island University
Morehouse College
Morehouse School of Medicine
New Mexico State University
Philadelphia University
Portland State University
Texas Southern University

University of Montana Foundation
University of North Carolina, Greensboro
University of Redlands
University of Washington
University of Washington Bothell
Washington University in St. Louis
Yale University

Interim Vice Provost for Academic Budget and Planning, Portland State University

July 2019 to April 2021

Provided budget, financial planning and management services for the Division of Academic Affairs, which includes nine colleges, interdisciplinary undergraduate education and several major student and academic support areas.

- Led annual budget planning and enrollment projection process for Division, through which a \$210M general fund budget is allocated to colleges, schools and major support units.
- Developed a new model for allocation of resources within Academic Affairs that will incorporate traditional metrics such as student credit hours and degrees awarded along with factors such as student success, cross-unit collaboration, public service, and net margin.
- Developed scenarios to frame future year budget planning in face of potential funding shortfalls.
- Managed Provost investment and discretionary funds. Worked with Provost and units to make targeted investments in areas like online learning, Honors, new degree programs, remissions, and critical technology platforms.
- Responded to ad hoc resource requests from Academic Affairs units, provide solutions to Provost and Deans.
- In face of flat divisional budget, allocated an effective \$7.7M budget reduction to units within division based on criteria such as enrollment trends and cost structures.
- Evaluated unit reserve levels and spending plans and assigned adjustments to meet a divisional contribution to central reserves; instituted new processes to monitor reserve spending.
- Facilitated position review process to justify new hiring and evaluate sustainability of those decisions in light of current budget limitations and potential future reductions.
- Assessed funding and operating models for online education. Includes options for funding and managing relationships with Online Program Management firms.
- Worked with team members and colleagues in other units to develop Tableau reports to provide clear and flexible views of budget to actual performance, reserve utilization, quarterly enrollment, and faculty utilization.
- Developed new modes of coordination between support organizations in Academic Affairs.
- Supervised development of an Academic Affairs data profile for use by PSU Board of Trustees.
- Served on leadership council for an institution-wide student success initiative, and as co-chair for subcommittee designing data and metrics to support this project.
- Served on work group advising Enrollment Management on the creation of a Strategic Enrollment Plan.
- Served on Enrollment Forecast Review Team, an inter-disciplinary group that reviews, reconciles and refines institutional enrollment forecasts and estimates and feedback from the colleges and schools.
- Supervised three fiscal staff for division including Senior Fiscal Officer.
- Provided administrative leadership for the newly opened Jordan Schnitzer Museum of Art, supervise museum staff. Developed staffing and funding model, built position descriptions, negotiated MOUs and loan agreements.
- One of three vice provosts at PSU, served on Academic Leadership Team with the deans of PSU's colleges.
- Presented on Academic Affairs budget initiatives to PSU Board of Trustees.
- Served as liaison to Faculty Senate Budget Committee.
- Operated within a heavily unionized environment.
- On leave from RPM Associates during this appointment.

University of Washington Global Innovation Exchange, Chief Operating Officer

September 2015 to January 2018

Served as Chief Operating Officer for the Global Innovation Exchange (GIX), a partnership between the University of Washington and Tsinghua University (Beijing), which opened in Bellevue, WA in September 2017. GIX offers interdisciplinary graduate and executive programs in technology innovation and leadership. The core academic programs combine training in hardware/software development, design thinking, and entrepreneurship, with a curriculum that is heavily project- and team-based. For Tsinghua, GIX represents the first time a Chinese university has established a physical footprint in the U.S. As COO, responsible for building the operational, funding, staffing and organizational models to support this initiative. Was part of the core project team from inception, involved in formulation of the concept, negotiation of external MOUs, administration of internal program approvals and operating agreements, securing NWCCU and State Department authorization, and building design and construction.

- Developed 20-year financial model and shorter-term budget and financial models for management, internal approvals, and reporting to funders.
- Hired and supervised 6-person administrative and support staff.
- Served as client representative in matters related to construction of 96,000 SF building.
- Served as liaison to Tsinghua leaders assigned to GIX, travelled to Beijing regularly in this role.
- Negotiated critical services with internal and external providers.
- Worked with my team to establish security protocols and provide student transportation services.
- Prepared Substantive Change application and served as liaison to Northwest Commission on Colleges and Universities.
- Represented GIX in the local community.
- Served in this role through a contract with RPM Associates.

Manager, KPMG Higher Education Consulting

September 1996 to April 2000

Specialized in business process redesign, operations improvement, and financial analysis. Adapted and applied techniques of activity-based costing, process redesign, balanced scorecard systems, contribution analysis, and financial modeling.

University of Chicago

Deputy Director, Office of Financial Planning and Budget

Senior Analyst, Human Resources

February 1993 to September 1996

As Deputy Director of the Office of Financial Planning and Budget for the University of Chicago, managed development of the University's \$790M annual operating budget and staffed the University Budget Committee. During time at Chicago, served as Interim Manager of the University Bookstore, leading it while the University evaluated outsourcing options. As Senior HR Analyst, responsible for modeling financial impact of changes to programs and plan structures, and assessing costs underlying premiums.

Manager of Administrative Services, Vanderbilt University Human Resources

June 1990 to February 1993

Managed departmental budgets, supervised university's Classification and Compensation unit, and led special projects. Served as facilitator for Vanderbilt's involvement in the INROADS program to support BPOC students from high school through college into professional careers.

OTHER EXPERIENCE

Author, *Budgeting for Not-for-Profit Organizations*, John Wiley & Sons, June 1999. (ISBN 0-471-25397-9)

Teaching

Belmont University, M.Ed. program in Nonprofit Leadership

Adjunct faculty member, Nonprofit Financial Management

University of Washington, MPA program

Adjunct faculty member, Nonprofit Financial Management

Nashville, TN

2009 to 2018

Seattle, WA

Spring 2017

Collegiate Management Institute (CACUBO)
Instructor on budgeting and data analysis

Milwaukee, WI and Oxford, OH
1998 to 2009

Consultant, Center for Nonprofit Management (Nashville). Provided consulting services to CNM clients in the areas of strategic planning, financial management and business planning. (2002 to 2011)

Board service

Board President of Intersection, a startup NPO dedicated to presenting contemporary classical music in Nashville (2015-19)

Board member (including terms as President and Treasurer) of the Belcourt Theatre, a nonprofit film house in Nashville housed in a historic neighborhood theater (2005-2011)

Art and music writer, *Nashville Scene* (2003-08)