

Brian G. Hutzley

December 27, 2023

Topic: Vice President for Administration and Finance, CFO - Northern Kentucky University

I am pleased to welcome this exciting opportunity to serve as the next Vice President of Finance for Northern Kentucky University. NKU's commitment to integrity, equity and community mirrors my own personal and professional values. With decades of experience in leadership, change management, finance, operations, and strategic planning in higher education, as well as within the private sector in leading corporations, I can utilize my professional acumen and highly developed team-building skills to execute ambitious goals for NKU. I eagerly share the specifics of my management style, professional and personal values, and qualifications.

My approach as a leader is to remove obstacles to innovation and collaboration, and to empower others to exceed goals and expectations. My experience has provided a great opportunity to strengthen governance and interaction with staff, faculty, and students by directly involving them in key campus-wide initiatives including strategic planning, new academic programs, as well as capital and budgeting. We have worked together on sustainability, benefits, campus beautification and community gardens, finance and endowment management and student research.

I also enjoy the time I spend with students on field trips, at athletic events, and competitions and with community service projects. This has been consistent at every campus I have worked at. I have taught courses on small business and entrepreneurship, and I am in my seventh-year teaching "Finance 101" for seniors, a review of basic skills sets that many graduates leave college without. I have consistently reached out to both faculty and student senates, including the state-wide organizations at SUNY.

Beginning in March 2020, I used every ounce of my energy, expertise, experience and passion for Centre College and higher education to lead us through the Covid-19 crisis. I was appointed to lead our efforts to close the college in March, and to reopen in late August. I facilitated every CV-19 Task Force meeting, developed every agenda, provided financial support for faculty, staff and students, tracked down funding, formed new partnerships, provided campus updates, facilitated faculty, staff, student, parent and Board of Trustees Zoom updates and answered every question openly and honestly. This work highlighted my capabilities to manage the known and unknown, using the skills of individuals not based on titles, but based on their knowledge and experience. My strong working relationships with our community became an important element of our reopening, working alongside the county Emergency Management Team, and partnering with the Department of Health, and our regional hospital system.

Like NKU, I am deeply committed to diversity, equity and social justice, my support in this area has extended beyond supporting budget requests. I have been actively involved at both Colgate and Centre and in the Danville community, as a founding member of a joint community leadership advisory committee made up of a diverse group of professionals, community members and students who served as a resource and standing presence representative of diversity, inclusion and social justice initiatives for community, government, and public agencies. I have also helped in the development of DEi initiatives. These have focused on key areas including recruiting and retention of faculty and staff, training, campus conversations, and broader campus awareness. Efforts have also included increasing advancement and

alumni efforts with more DEi opportunities. Most importantly I have publicly supported and pushed for proactive conversations and change. At both Centre and Colgate, students and faculty initiated sit-ins at the main administration buildings. Topics discussed included race and social justice issues on the campuses. I was heavily involved in the conversations with students and faculty, as well as with the follow-up on the commitments made. It proved to be another opportunity to be engaged, meet students and faculty, and to learn more about issues, suggestions and opportunities to make both campuses better places to live and learn. In my role as the SUNY CFO, I spear-headed efforts across New York to increase procurement from Minority and Women Business Enterprises (MWBE). SUNY was under 3% of its purchases from MWBE and this was increased to 14% with a goal of achieving 35%. This was under the constant feedback from key campuses that the 3% was good enough and there was not any more opportunity. I would truly enjoy being directly involved in NKU's DEi Initiatives.

Shortly after I started at Centre, I initiated and co-led the efforts for a Campus Master Plan. A significant portion of this plan has been completed or is in-process, with over \$120 million in investments. In addition to completing several strategic capital projects to strengthen our academic and residential offerings, Centre broke ground on a new \$67 million, 135,000-s.f. facility devoted to wellness and athletic excellence, our largest project ever. This project is well underway. I also led our campus-wide strategic planning process. In this role, I was responsible for developing the process, timeline, engaging the campus through existing governance, updating the campus community, developing a steering committee and working groups comprised of faculty, staff, students, community leaders, alumni and the Board of Trustees. This was presented and approved at the January 2022 Board meeting.

In support of the strategic plan, under my leadership, Centre College has participated in a wide variety of research and benchmarking projects, including a brand perception survey, comparisons of demographic and tuition data with peer institutions, annual surveys of alumni career mobility, a holistic review of career and professional development offerings, benchmarking for the business and data science programs, the creation of a learning commons and a social entrepreneurship program, and the addition of an eSports team. In addition, Centre engaged the Art & Science Group to explore the competitive landscape, determine how the College is positioned among its prospective student constituencies, and identify which of the many possibilities on the table represent the highest-priority investments for Centre and the degree of investment needed for market impact. The results have been consistent: Centre is providing a rigorous education and is outperforming expectations for alumni connections and study abroad opportunities. However, the College has opportunities to recruit and retain more students by devoting additional attention to student success and support, career readiness, community engagement and experiential learning, and a more vibrant, diverse, and inclusive campus community.

I am also directly involved in fundraising efforts. Not just the goal setting and tracking, but also reaching out to trustees and Centre community members on key projects and priorities. I am the unofficial major gift officer for four of Centre's biggest donors. I led the efforts to develop a \$100,000,000 package for a major gift prospect and created a donor pyramid for our Olin Hall Science Center expansion and renovation, which led to \$3,000,000 of fundraising on a \$9,000,000 project. Other fundraising projects I have led include; bell tower and clock plaza project, campus-wide signage and wayfinding, women's softball facilities, athletic facility upgrades, financial aid, premier scholars programs, student entrepreneur programs (CentreWorks) and a CV-19 student support fund. In addition, I was the chair of the search committee for the Vice President of Advancement.

My track record in sustainability has been very strong. I have worked with faculty, facilities leaders, and students on many projects. From green buildings, recycling and reusing/repurposing, energy

efficiencies, and local sourcing, to the creation of "green funds". At Centre, I created and resourced a new sustainability position. With the generous support of a board member, we completed a \$3 million LED retrofit of virtually all campus lighting. I helped devise a partnership with Centre and the Kentucky School for the Deaf to create a Centre farm on their land. This is an opportunity for faculty and student research, and a community garden which is a component of Danville's downtown master plan. I led the effort to install a Food Waste Dehydrator in our dining hall. The project involved faculty and students who are also using it for research projects. Centre is one of the first colleges in the country to be using this technology. Most recently I led the effort to install over 90 geothermal wells to support our new natatorium project and am working on the final details to implement a "freight farm" which will produce 100% of our dining halls lettuce and greens and will support local food pantry programs.

As the Vice Chancellor and Chief Financial Officer for The State University of New York (SUNY), I had the privilege of working with the University's Leadership Team, Board of Trustees, Faculty Senate, Student Senate and one of the nation's most visionary leaders. I succeeded in creating financial stability as well as building campus funds during a time of enrollment growth, program expansion, critical maintenance, and new building projects. The financial condition at SUNY had become increasingly challenging. However, under my leadership, we drove over \$100 million in annual savings while ensuring continued investments in our future. In addition, I provided leadership on numerous SUNY-wide committees including Leadership Development, Shared Services, and Information Technology Transformation. These priorities provided me with the opportunity to gain a deeper understanding of the needs of the students, faculty, and the campus communities. My responsibilities took me far outside the normal activities of a CFO, leading our economic development agenda and working directly with the Governor's office, state legislature, and the 64 SUNY campuses.

My experience extends beyond higher education and includes a record of performance in the corporate and not-for-profit sectors. NKU would benefit from my experience in business and industry. In the business world, as in academia, the need to understand and manage change and effectively seek efficiencies are among the greatest challenges a leader will encounter. I have accomplished this consistently through open, logical, and fact-based discussions.

From all my experiences in higher education, the area that I am the proudest of, is building relationships and partnerships with students and the community. I have engaged with students in various ways from teaching and advising, to having direct discussion with students on tuition and fees, IT services, facilities, food-service, textbook costs, and bookstore priorities. Working with the Title IX Office, I taught a seminar at Centre College on Productive Masculinity.

Volunteering, making connections in service, economic development, and creating partnerships in the community have been equally as fulfilling. I have appreciated the opportunity to participate in our city and region's revitalization. Relationships between Centre and the community are stronger than they have ever been, due in part, to my outreach and participation in downtown redevelopment, arts and culture, economic development and social justice issues. Earning the trust and respect of the community leaders and citizens has been a priority to me everywhere that I have worked. In fact, my nickname with many of the Centre community members is "The Mayor". With the help of many campus and community leaders, I led the charge to develop a vacant space in a downtown building that is now the home of CentreWorks, our new initiative focused on entrepreneurship and community engagement. This provides not only opportunities for students, but also the broader community, including alumni, our local high schools and our technical and community college. I was very humbled last year when I was commissioned as a Kentucky Colonel. Kentucky Colonel is the highest title of honor bestowed by the

Commonwealth of Kentucky, and is the most well-known of a number of honorary colonelcies conferred by United States governors. This was awarded by Governor, in recognition of my service to the Commonwealth of Kentucky and for my leadership in the community and region. I relish the opportunity to participate in the continued development of Lancaster and your region.

I also like to be engaged and involved. I founded the Art and Soul of the Catskill Festival in Delhi, N.Y., represent Centre College for the Great American Brass Band Festival, and the Soul of 2nd Street Festival. I am Vice Chair of the Danville/Boyle County Chamber of Commerce and was recently elected as Chair of the Danville/Bole County Economic Development Corporation (EDC). As the President of the board for the Art Center of the Bluegrass, I helped develop stronger relationship between the Art Center and the Art Department at Centre College. This includes a partnership to develop a \$4 million blown glass art gallery to display the collection of Stephen Rolfe Powell, a world-renowned glass artist that went to and taught at Centre College.

In conclusion, I would like to thank you for considering my application to be the next Vice President of Administration and Finance for Northern Kentucky University. My experience, knowledge and expertise put me in the ideal position to pursue this opportunity to help lead such an important university during these challenging and critical times. I pledge to pour my energy and talents into leading, supporting, and inspiring faculty, staff, students, and the entire community.

Sincerely,

Brian G. Hutzley

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QUALIFICATIONS SUMMARY

A collaborative, innovative, results-oriented leader with proven track record of driving continuous improvements in performance, processes and teamwork. Areas of expertise include organizational and leadership development, strategy development and implementation, strategic sourcing, service management and transformation, financial planning and operational excellence, investment management.

EDUCATION

M.B.A., Syracuse University, Syracuse, NY

B.S., Accounting, Michigan State University, East Lansing, MI

EXPERIENCE

Centre College, Danville, KY (\$80 million)

2016-Current

CFO, Vice President for Finance, Treasurer

Responsibilities include strategic planning, finance and accounting, budget and endowment management, benefits, capital and facilities, auxiliary services, community relationships, treasury and enterprise risk management. Responsible for key strategic initiatives including operational efficiencies.

- **Strategic Planning.** Initiated and led a strategic priority process for the campus, identifying and implementing short-term and long-term initiatives to improve the student experience, net revenues and overall operating efficiencies. The focus of this work includes: Marketing/branding, enrollment strategies, diversity, equity and inclusion, new academic offerings, maximizing donor participation, operational efficiencies, enhancing the physical space, and leadership/workforce development.
- **CV-19.** Initiated and lead the CV-19 Special Task Force. Managed the closing and reopening of the campus in 2020, including health and safety, communications, policies and procedures, pay and benefits, community engagement, emergency housing, technology and funding.
- **Investment Management.** Worked with an internal team and the Investment Committee, to grow the Centre endowment from \$270 million to \$450 million. This work included the creation of investments, cash, debt and capital policies, automation of endowment tracking and draw calculations, improvements in reporting, hiring a third party advisor and creating a new Senior Investment Advisor position.
- **Budgeting.** Designed and implemented a campus-wide budgeting tool and process. This included monthly updates, and an automated budget tool that provides for version tracking and notes. Additional focus was given to areas whose budgets had been running over for several years.
- **Financial Reporting.** Initiated and implemented a quarterly close process. This has helped to noticeably improve the year-end close process from fifteen weeks to four. It has also helped us improve on the accuracy of our monthly forecasts.
- **Enrollment and Financial Aid.** Worked with the Admissions and Financial Aid offices to develop tools to forecast and track enrollment and financial aid by cohort. This helps the college better plan and manage financial aid.

Centre College - Continued

- **Capital Planning.** Developed a ten-year Campus Master Plan and an annual allocation and prioritization process. This work included a competitive RFP process, campus and community outreach and funding options. The Centre Board of Trustees approved the plan in April 2018. The first project completed was a \$20 million residence hall that opened in the fall of 2019. A \$9 million update and expansion of the science center was complete in spring 2021. The plan included an energy master plan, which identified over \$8 million in projects. Other critical projects include first year student housing renovations and academic facility improvements.
- **Initiative for Wellness and Athletics Excellence.** Leading the effort to design, build and fund a \$60M capital project that will transform the Centre campus and will become an economic driver for the region. Encompassing a 50-meter aquatics center, a state-of-the-art strength and performance center, a 200-meter indoor track with turf infield, locker rooms, multi-purpose event spaces, as well as the relocation and revitalization of current facilities, this initiative will transform health and wellness opportunities, student recruitment, and community connectedness. <https://www.centre.edu/iwae/>
- **Student Employment.** Developed a process to manage student employment. Prior to this, there was no specific budgets for the departments to manage, and overspending was common.
- **Study Abroad.** Developed risk management procedures, detailed program level budgets, internal controls for procurement cards, wire transfers and cash. In addition, developed improved controls and processes for the Strasbourg, France and Merida, Mexico programs. These programs have permanent staff, buildings and equipment and had no internal controls or financial oversight.
- **Procurement.** Developed a cycle and a process for competitive RFP's for all major contracted services including audit, food service, bookstore, transportation, legal, healthcare and construction management.
- **Human Resources.** Implemented workforce development improvements that included the rollout of consistent job descriptions, an annual review process, diversity recruiting practices, and a performance based bonus program. In addition, salaries were benchmarked against peer schools and local employers and a program was put in place to bring employees up to the midpoints from the study.
- **Healthcare.** Initiated planning and reporting tools that allowed for stronger management of healthcare expenses. Created a supplemental healthcare reserve and a corresponding board policy that protects the reserve. Implemented a high deductible plan and developed a three-year strategic plan. In the end, this initiative helped hold healthcare expenses flat, improved controls, and provides Centre the ability to make informed decisions.
- **Debt Service.** Implemented refinancing of 2007A series bonds, providing net present value savings of over \$3.6 million. Developed process and strategy for \$30 million in additional debt in support of new residence halls, science center expansion and renovation, and energy and safety improvements. This closed in November 2018, with project planning and implementation starting immediately.
- **Shared Service.** Collaborated with other private schools for shared pharmaceutical, shared procurement contracts, and other best practices.
- **Food Service.** Working with Sodexo, drove numerous improvements in the quality and variety of the food. This included a focused effort in the area of special needs for dietary, allergies and religious requirements. Revamped catering offerings, selection and pricing. Drove improvements in concessions for athletic and other events.
- **Executive Searches.** Co-chaired the successful search for the Chief Information Officer, Vice President for Academics and Provost, VP for Strategic Branding and Communications, Executive Director of Strategic Initiatives and External Relations and chaired the search for Vice President of Advancement and Alumni Affairs.
- **Performing Arts Center.** Worked with the Director of the Norton Center for the Performing Arts to develop strategies to improve sales, reduce discounting and operating costs.
- **Enterprise Risk Management (ERM).** Developed a campus-wide ERM process and guidelines. Initiated training programs in areas including general safety, study abroad, and hazardous materials.
- **Strategic Property Acquisition.** Developed a detailed inventory and priority list for properties of interest to the College for future acquisitions. Used this list to fund and procure several properties.

Colgate University, Hamilton, NY (\$180 million)

2013-2016

Vice President for Finance and Administration, Treasurer

Administrative responsibilities include finance and accounting, budget and strategic planning, endowment management and investments, human resources and benefits, capital and facilities, auxiliary services, community services, treasury and risk management. Responsible for key strategic initiatives including operational efficiencies and service excellence, talent management transformation, strategic sourcing and the capital master plan.

- **Leadership.** Initiated division-wide meetings, created SMART goals and annual performance reviews in the areas of organizational efficiencies, diversity and inclusion, sustainability, service and communication.
- **Operational Efficiencies and Service Excellence.** Drove improvements in services, processes and spending including accounts payable, budget and financial reporting, as well as the design and prioritization of future projects (e-procurement). Additional accomplishments include the rollout of self-insurance, touch-net (e-commerce), web-time entry, and record retention policies. Implemented Concur travel and expense solution. Successfully transitioned to new audit, food service, transportation and office supply partners after robust **RFP** processes.
- **Capital Planning.** Initiated and implemented significant improvements in capital planning, driving improvements in capital project management, costing, sourcing, and communication. Created a detailed 5-year forecast capturing "sources and uses" in an executive format tied to the detail of all capital projects.
- **Capital Management.** Developed plans and started capital projects including the New Athletic Facility, Center for Art and Culture, Residential Learning Communities, and Career Services. Developed overall campus-plans for improvements in ADA accessibility and gender-neutral restrooms.
- **Funding and Debt Management.** Successfully issued \$40 million of refunding bonds with debt service savings in excess of \$8.8 million or 13.71% of the par value. Initiated and finalized the financing of \$55.0 million in new debt.
- **Human Resources.** Drove improvements including a 5-tier pay-for-performance rating system, dependent verification for health insurance process, retirement plan investment changes, graduate tuition reimbursement program and a leadership-training workshop for supervisors.
- **Dining Services.** Initiated and completed a RFP process to significantly improve quality, service, and selection across the campus food service venues. This comprehensive review, a process that had not happened for more than 40 years, engaged the campus community in extensive conversations about expectations for quality, selection, service and sustainability. Formed a food service advisory team to guide the process. Conducted extensive qualitative research including 12 focus groups and 30 one-on-one interviews.
- **Organizational Review.** Initiated and implemented significant and noticeable changes to improve division and university-wide results through reorganizations that included Facilities, Capital Projects, the Bookstore, Movie Theater, The Palace Theater, Food Service, 7 Oaks Golf Course, Copy Center and Mailroom, as well as Treasury and Endowment support functions. Reduced headcount and spending while improving service.

State University of New York, Albany, NY (\$12 billion)

2011-2013

Vice Chancellor and CFO

Responsible for a \$12 billion annual budget as well as the overall administration and operations of the University System. Responsibilities included finance and budget, university accounting and audit, financial aid and information technology. Provided leadership in key areas including the Chancellor's Leadership Development Committees. Responsible for key strategic initiatives including Information Technology Transformation, Resource Allocation, Budget Task Force, University Hospitals Reengineering Team, Shared Services, and Strategic Sourcing. Served as President of the State University Business Officers Association, providing invaluable vision, insight, leadership development and policy support for the entire SUNY system.

- **Strategic Planning.** Designed and implemented a strategic planning funding process that included a competitive grants based tool, resource assessment, and prioritization of new and existing strategic initiatives. Prioritized strategic opportunities including vibrant community, healthy NY, energy smart New York, research and innovation, cross-university partnerships, global initiatives and operational efficiencies and service excellence.
- **Entrepreneurial Century.** Chair and executive liaison for the top SUNY strategic initiative. Served on the Governors strategic review team for the ten Regional Economic Development Councils (REDCs). These councils are comprised of local experts and stakeholders from business, academia, and local government. The Regional Councils redefined the way New York invests in jobs and economic growth by putting in place a community-based, bottoms up approach. Provided assessment of the 2011 & 2012 plans that awarded over \$1.5 billion in funding.
- **Information Technology Transformation.** Responsible for the system-wide reengineering of all information technology infrastructure and services. Included the integration of 64 campuses data centers, student information systems, data warehousing, business intelligence, virtual desktop infrastructure and information security.
- **Small Business Development Centers (SBDC).** Provided leadership, fiscal management and oversight to the State of New York's SBDC network. The SBDC's are a diversified partnership between SUNY, the U.S. Small Business Administration, New York State and the private sector. There are 24 Regional Centers, 28 Outreach Offices and numerous satellites to place 98% of NYS' population within 30 minutes of an SBDC location.
- **Capital.** Overall, budget responsibilities for the \$1.0 billion educational facilities and the \$0.5 billion residence halls budgets. Included five-year capital funds, capital master plans, and energy/sustainability plans. Additional role in the design and management of the "SUNY 2020 Challenge Grant" program with a \$60 million annual budget tying New York State economic development and the workforce needs of the regions.
- **Sponsored Programs.** Responsible for the \$50 million System level sponsored programs office. SUNY Executive representative to the SUNY Research Foundation. A \$1.2 billion subsidiary providing leadership, oversight, administrative and technical expertise in support of research and discovery at all of the SUNY campuses.
- **Finance and Administration Strategy Team (F.A.S.T.).** Initiated and implemented the SUNY-wide Finance and Administration Strategy Team. FAST had responsibility for a broad array of financial and administrative topics, including resource allocation, accounting, reporting, tuition and fees. FAST reviewed and designed policies, provided planning, and the technical support required to drive continuous improvements in all administrative areas. The committee included campus presidents, business officers and provosts. This team has transformed system-wide governance as this work was previously done by system administration staff

SUNY-Continued

- **Resource Allocation.** Developed financial tools that allocate state support to the individual campuses. The model accommodated increases or decreases in state funding, and was integrated with performance-based funding and strategic planning initiatives. Focus was on promoting strategic enrollment, research priorities and the special mission of campuses
- **Budgeting & Planning.** Designed and developed an "all funds" approach for the \$200 million Central System Administration budget. Prioritization focused on strategic needs, student success, driving savings, operational efficiencies, customer service and health & safety. Provided consistent management of reserves and stabilization funds. Reengineered the entire recharge and chargeback process. Created a five-year campus level all funds process, incorporating five-year tuition, fees, capital, negotiated union contracts and strategic plans.
- **Performance Based Funding.** Designed and implemented performance based funding tools. Working with the Lumina Foundation researched metrics, best practice, budget models and political strategies. Worked directly with campuses to identify system-wide metrics but to also develop a menu of metrics that are critical to specific sectors.
- **Peer Based Funding.** Created a national benchmarking tool to provide key insight into the consistency of funding at each campuses through a peer comparison. The study highlighted campus funding disparities within the system and in a national context. Helped adapt resource allocation methods to resolve disparities in campus funding. Used to develop advocacy strategies to improve system and campus funding levels compared with peers. Included a campus-by-campus process with System Administration to develop the final peer selection.
- **Strategic Sourcing.** Initiated and implemented SUNY Strategic Sourcing. Worked with procurement experts at The Research Foundation, state-operated and community colleges, as well New York State to combine buying power driving large-scale savings and efficiencies in the purchasing of commodities and services.
- **Shared Services.** Responsible for a system-wide effort to drive savings in administration spending to reinvest in instruction and direct student services. Savings of over \$100 million annually were identified that were reinvested to enhance the core academic and student service missions of the campuses driving operational efficiencies and enhancing student services to improve access, completion and success.
- **Financial Aid & Debt Default.** Provided leadership, continuous improvement and a focus on best practices at both a state and national level in financial aid and debt default. Initiated and designed SUNY SMART track, data driven approach to student retention and default prevention using federal and SUNY data to identify at risk borrowers through an inclusive new student engagement strategy. Created targeted programs to mitigate risk and additional strategies for delinquent borrowers and defaulted borrowers. This includes the creation of the SUNY Award Letter, a Financial Literacy Program and the expansion of the Student Loan Services Center (SLSC). Collaborated with the NYS Consumer Protection Bureau to provide training and guidance on topics including Identity Theft and Responsible Credit Card Management.

State University of New York, Delhi, NY (\$SOM)

2005-2011

Vice President Business and Finance

- **Strategic Planning & Growth.** Designed and implemented a strategic planning process that included market analysis, resource assessment, and prioritization of strategic initiatives. Prioritized strategic opportunities including key program growth, cross university partnerships, global initiatives and operational excellence. Outcomes included increasing revenues by over 15%, improvements in student services, and over \$1.0M in net income.
- **Business & Program Development.** Developed and implemented numerous business plans, including community college extension growth, PGA program, online veterinary management degree, online nursing. Collaborated with Bassett Healthcare. Developed new pricing for online courses. Negotiated upgrades to the distance-learning classroom utilized for the BOCES high school program.
- **Information Technology.** Reengineered the entire IT infrastructure, wireless network, and wired network, mainframe to virtual servers, labs, classroom technology, faculty laptop program, security and telecommunications. This included the transformation of the IT organization into a customer- focused department with both operational efficiencies and long-term vision. Developed migration plans that provided single sign-on capabilities, common calendaring and self-service offerings.
- **Budgeting & Planning.** Developed detailed budgets across the campus, including a long-term needs assessment for headcount, equipment, technology and facilities. Drove significant improvements in process, forms, communication and timing. Developed a tool for long-term planning under various scenarios, including the impact of reductions in state support and improvements in revenue generation. Redesigned a cost-by-program and cost-by-credit hour tool allowing for a consistent campus-wide assessment of department level efficiencies.
- **Research & Grants.** Responsible for the administrative, financial and strategic planning functions for all research initiatives. Key campus initiatives have included the SUNY Center of Excellence in WATER (Watershed Applications and Technology-Based Economic Revitalization). Managed the Department of Conservation (DEC)/Onsite Training Network (OTN) partnership, providing statewide training for all wastewater and onsite system professionals, including system design and inspection.
- **Online Education.** Responsibilities included the Delhi Online Education (DOE) Department that develops and implements best practices across the online education functions. Grew online enrollment by 800% in three years. Migrated all existing courses to an open source solution.
- **College Website.** Developed a process to evaluate the overall structure and organization of the college website, allowing a refreshed interface design and re-architected navigation.
- **Student Support.** Helped SUNY Delhi students find jobs on and off campus, developed numerous internships, developed additional opportunities for students, including scholarships and student activity support. Addressed campus-wide issues, including fees, food service and textbook costs.
- **Service Excellence & Operational Efficiencies.** Initiated new campus strategies focused on service excellence and operational efficiencies. Drove improvements in management and leadership processes, including written job descriptions, documenting clear expectations, improved accountability, follow-up, planning, communication and leadership.
- **SUNY Leadership & Service.** Served on the SUNY Chancellor's Leadership Advisory Committee, Budget Task Force, Economic Development and Information Technology Transformation teams. Working with SUNY Labor Relations on a collective bargaining unit strategy. President of the State of New York Business Officers Association (SUBOA) responsible for policy recommendations, including tuition, budget allocation and fee structures.
- **Sustainability.** Director for the Center of Excellence in WATER, managing four grants in this area. Initiated development of business plan for a national program for photovoltaic training. Worked on recycling, composting, solar and water conservation programs.

Mead/AT-A-GLANCE, Dayton, Ohio and Sidney, NY (\$1.2 Billion)

Director of Finance & Strategy/CFO

Member of Mead School & Office Products Executive Team. Responsible for the operational, strategic and financial outcomes (\$1.2B). Worked on corporate-wide initiatives, including leadership development, acquisitions, operational optimization and systems migration.

- Managed the fiscal, operational and cultural integration of the \$500M Mead acquisition of At-A-Glance. Implemented process improvements, allowing for expansion of the At-A-Glance operation, versus consolidation into Mead. Developed and presented organizational proposals that increased employment at the Sidney, NY division. Led the employee group through the challenges of integration and significant change.
- Designed and implemented management development and succession planning programs, including a 360^o program and organizational development programs focused on teamwork and innovation.
- Developed and implemented the project plan for assessment, design and migration of all operating systems to an enterprise-wide system (SAP), including all the training and change management aspects of the implementation.
- Developed a strategic planning process including an acquisition strategy, a non-traditional channel/market strategy and a strategic process for direct-to-consumer sales growth (\$10M), ad specialty growth (\$17M), and Mead/Columbian branded growth (\$25M).
- Designed and implemented division and corporate improvement programs in working capital, driving 10% improvement in receivables, 8% improvement in inventory and \$5M in annual cost savings.
- Drove acquisitions and alliances processes, including identification, contact, valuation, due diligence, negotiation, contract development and integration. Completed activities include Castelli USA/Lediberg (Italy) (\$3.5M), DayRunner (\$65M) and Visual Organizer (\$15M).
- Managed all aspects of the Tilibra S.A. (Brazil) integration activities (\$110M). Developed integration action plan and drove integration for Finance, Manufacturing, Accounting, Sales, Marketing, Legal, Environmental and HR.

Corporate Controller. Initiated and developed consignment sales strategy. Developed financial modeling tool that allows for quick reaction to ongoing consignment requests from national accounts, including Staples, Office Max, Office Depot, Wal-Mart and K-Mart.

- Developed automated budgeting tools and a division-wide review process, allowing detailed understanding and ownership for shipping, manufacturing costs and departmental spending.
- Drove divestiture of Sports Posters (\$10M) and Fuzzy Poster/Creative Coloring (\$18M) businesses.
- Directed systems implementations, including payroll, general ledger and payables, improving reporting capabilities, data availability, flexibility and accuracy.
- Developed cost accounting systems, tools and controls, including full absorption costing implementations, make vs. buy tools, training and cost reduction programs.

NCR, Dayton, OH

Director of Strategic Planning {\$108}, Toronto, Canada

- Developed strategic plans for AT&T's global manufacturing division, including emerging markets and outsourcing strategies, global capacity planning and competitive intelligence.
- Coordinated factory performance benchmarking study and developed the high performance balanced scorecard assessment tool for worldwide manufacturing.
- Developed worldwide manufacturing capacity plan, realizing annual savings of \$5.0M.

Controller, Software Division {\$30M}, Columbia, SC

- Transformation/centralization of Finance, HR, IT and Facilities, driving annual savings of \$1.SM.
- Implemented reporting tools for senior management, improving management of business decisions.
- Initiated and developed ABC/ABM processes and tools, driving annual savings of \$2.0M.

Finance Manager, Retails Systems Division {\$500M}, Atlanta, GA

- Designed and implemented automated cost accounting system, providing annual savings of \$0.SM.
- Designed and developed a set of R&D financial tools for budgeting and tracking, providing improved information and controls, allowing annual savings of \$0.6M.
- Coordinated the implementation of Oracle general ledger and accounts payable.

Product Manager, Printer Products Division {\$100M}, Ithaca, NY

- Developed next generation retail multifunction printer, increasing revenues \$20M.
- Managed the complete product life cycle, competitive analysis and pricing strategies for industry specific point-of sale (POS) printers.

Finance Manager, Printer Products Division {\$100M}, Ithaca, NY

- Designed and implemented a manufacturing capacity tool for managing direct labor (\$1.SM savings).
- Developed cycle count and physical inventory programs, improving accuracy and decreasing costs (annual savings of \$0.6M).
- Initiated, developed and implemented an ABC tool for product cost estimating (\$0.SM savings).

Senior Financial Analyst, Computer Division (\$28), Columbia, SC

- Developed integrated budgeting tool for engineering and manufacturing (annual savings of \$0.SM).
- Established risk review process and excess and obsolete inventory process (annual savings of \$2.SM).

Financial Analyst, Retail Systems Division {\$500MM}, Dayton, OH

- Developed and implemented PC-based financial planning, analysis and reporting tool for division consolidation.