EDUCATION - University of Illinois at Urbana-Champaign Doctor of Philosophy, Education Policy Organization & Leadership (2024)

• Awarded the Edwin J. O'Leary Fellowship for the study of financial management of institutions of higher education (2021 – 2022).

Master of Business Administration, finance concentration (2002) Bachelor of Science in General Engineering, control systems concentration (1998)

UNIVERSITY OF MISSOURI KANSAS CITY (UMKC), Kansas City, MO Vice Chancellor for Finance and Administration & Chief Financial Officer (2022 – Present)

Provide leadership for the financial and business operation of the university with operating budget of \$502mm and assets of \$1.2bb. I oversee 8 direct reports and a total staff of over 200 and the full list of business units is provided below. As the chief financial officer, I'm responsible for the development of the annual budget, revenue projections, as well as ensuring the university is compliant with state and federal guidelines, regulations, and relevant governing legislation.

- As the Chief Financial Officer managed overall accounting (GAAP), GASB compliance in financial reporting to University of Missouri Board of Curators, State of Missouri, and for annual external audit of the university.
- Oversight of institutional investments and capital project financing, including ongoing debt service for the existing bond portfolio (\$300mm)
- Led committee for updating Resource Investment Model of budget in FY22 & FY23.
- Provide strategic financial and business leadership with data driven decision making increasing net position by 9% in 2022, 6% in 2023 and at 2% for FY24 & FY25.
- Closely monitored fiscal performance of the university to allow for efficient and timely investments in strategic initiatives throughout the budget cycle.
- Developed the 5 year financial operations and capital plan, including management of debt portfolio and maintained target operating margin above 3%.
- Partner with Provost to develop and implement \$20mm in strategic investments and developed a \$10 mm funding plan for strategic salary decompression.
- Executive oversight for capital initiatives including: \$153mm health care building, \$15mm rural satellite for School of Medicine, and over \$75mm in other campus improvements.
- Capital campaign planning for new \$60mm athletics facility, \$60mm renovation and addition to performing arts center, and \$30mm in student success center & library renovations, and \$25mm public radio station.
- Developed program to provide matching dollars to secure state grant opportunities awarded \$2mm (FY22), \$3.5mm (FY23), and \$4.2mm (FY24).
- Provide oversight and support of the fiscal operations of the foundation.
- Ensure timely and accurate financial reporting and oversight of audits.
- Provide financial oversight for NCAA Division 1 athletics.
- Management of rental real estate portfolio of over 170 properties.
- Negotiated and executed partnerships with professional athletic organizations including the KC Chiefs, KC Royals, KC Sporting, and KC Current to provide enhanced marketing

- for the university, while providing UMKC students with experiential learning opportunities and educational access for professional athletes.
- Partnership with regional entities to secure a Regional Technology and Innovation Hub (Tech Hub), US Economic Development Administration. Grants will fund investment to enhance ecosystem and accelerate emerging technologies at the nexus of human & animal health, urban & rural health, and healthcare technology. \$6mm Build to Scale grants awarded in Nov. 2023. Program phase 2 (~\$50mm) anticipate award in 2024.
- Assembled a public private partnership (P3) for the redevelopment of the historic Epperson House (\$10mm)
- Partnered with private library, Linda Hall Library, on common street closure and traffic redirection with the Kansas City public works and Kansas City Parks.
- Partnered with Kansas City Streetcar Authority for extension of streetcar to UMKC Campus terminus and provide adjacent parking for streetcar riders.

Operational Units

Accounting and budget

Bursar/cashiers

Contracts, procurement, and payables

Treasury, investments, and risk management

Facility services

Environmental health and safety

Capital planning, design and construction

Campus master-planning

Real estate portfolio management

Utilities, renewable energy, and sustainability

University police department

Fiscal responsibility for auxiliaries/revenue bond areas, athletics, UMKC Board of Trustees,

UMKC related foundations, and the overall finances of the University

Councils, Committees, Boards

UMKC Executive Council

University of Missouri System Administrative Management Council

University of Missouri Council of Chief Financial Officers

UMKC Board of Trustees Asset Management Committee

University Budget Committee

UMKC Neighborhood Advisory Committee

University Health Physicians Board Member

EASTERN ILLINOIS UNIVERSITY (EIU), Charleston, IL

Vice President for Business Affairs & Chief Financial Officer, (2020 – 2022)

Provide leadership for the financial and business operation of the university with an operating budget of \$165mm, assets of \$315mm, and 10 direct reports with total staff of over 300 employees across 9 collective bargaining units. The business units overseen are listed below. As the chief financial officer, I was responsible for the development of the annual budget,

revenue projections, as well as ensuring the university is compliant with state and federal guidelines, regulations, and relevant governing legislation.

- As the Chief Financial Officer managed overall accounting (GAAP), GASB compliance in financial reporting to Board of Trustees, State of Illinois, and the annual external audit of the university.
- Oversight of institutional investments and capital project financing, including ongoing debt service for the existing bond portfolio, oversight for a new \$111mm Science Building, \$15mm in capital renewal, and for Illinois Innovation Network facility.
- Champion our commitment to diversity increased utilization of diverse businesses from less than 2% of our procurement spend to 11% of spend in first year.
- Fiscal oversight for the start-up of the new College of Nursing.
- Provided strategic financial and business leadership with data driven decision making.
- Provided oversight to campus financial performance across all units, including forecasting and strategic planning of university revenue/expense and asset/liabilities.
- Oversee and lead bond issuance and management.
- Partner with other Vice Presidents to develop and implement strategies to strengthen financial position of the institution.
- As an Ex officio member of the EIU Foundation board, provided fiscal support and oversight to endowment and operations.
- Ensure timely and accurate financial reporting and oversee audits.
- Direct contract negotiations with collective bargaining units.
- Financial oversight for NCAA Division 1 athletics.
- Guest lecturer for finance in Lumpkin College of Business and Technology.

Operational Units

Accounting, bursar, cash management, expense control, payables Human resources, benefits, payroll Treasury, risk management Procurement Facility services, campus safety Capital programs and investment, and campus master-planning Utilities, renewable energy, and sustainability Fiscal responsibility for auxiliaries/revenue bond areas, athletics Fiscal oversight for EIU Foundation

Councils & Committees

Board of Trustees Finance Committee Presidents Council Illinois Board of Higher Education Chief Financial Officers Council on University Planning and Budget Staff Senate & Civil Service Committee Campus Facilities Committee

UNIVERSITY OF ILLINOIS, Urbana-Champaign, IL

Assistant Vice President, System Office of Capital Programs & Utility Services (2016 – 2020) President of Prairieland Energy Inc. (PEI) – a Univ. owned corporation (2016 – 2020) Assistant Director, Capital Programs (2009 – 2015)

Capital Programs

Provide oversight and management of the built environment for the Univ. of Illinois System with annual expenditure of \$225-\$275 million in capital projects:

- University of Illinois at Urbana-Champaign 23 msf, 353 buildings on 5,050 acres
- University of Illinois at Chicago 15 msf, 134 buildings on 311 acre urban campus
- University of Illinois at Springfield 765,000 sf, 42 buildings, on 746 acres

Key areas of responsibilities include:

- Financial oversight, budget, and cash flow development for capital programs.
- Campus master planning and development strategy for capital improvement across all campuses.
- Developed and championed capital project budget request to State of Illinois.
- Prepared all Board of Trustee capital agenda items.
- Delegated Comptroller and President signature authority for capital contracts.
- Capital project & deferred maintenance performance and reporting.
- Procurement & contracting requirements, procedures, and policy.
- Act as the liaison with the State of Illinois agencies including: Legislative Audit Commission, Capital Development Board, and Chief Procurement Office.
- Oversee Diverse Business Utilization for Capital Programs.
- Assist with the development of the Veterans & Diverse Business Program Policy.
- Lead the development of the Energy Performance Contracting Policy.
- Review and approve all capital related contracts.
- Investigate and recommend resolutions on issues related to construction projects.

Prairieland Energy Inc. & Utility Services

Key areas of responsibilities include:

- Manage utility services and operation of PEI and provide interface to energy markets for procurement of fuels and energy for each University of Illinois campus.
- Oversee use of derivatives (forward/futures contracts, Power Purchase agreements) with annual expenditures of \$50 \$60 million.
- Provide planning, budgeting, rate setting, and reporting activities for campus utility operations including regulatory reviews, rate interventions, and compliance reporting.
- Provide sustainability and climate action plan development including use of solar and wind energy through capital plant investment, third party power purchase agreements, and energy performance contracts, which included the addition of nearly 20 megawatt utility scale 60 acre solar array on campus.
- Financial performance and report to the PEI, Inc. board, university Board of Trustees and senior university administration.

University of Illinois Council & Committee's

President Capital Review Committee
Vice President & CFO Capital Planning Committee
Senior Associate Vice President Advisory Council
Discovery Partners Institute Formation Committee
Legislative Audit Commission Review Committee
University Reorganization and Alignment Committee
Diverse Business Enterprise Committee for Procurement
Chancellor's Capital Review Committee

MICHIGAN STATE UNIVERSITY, East Lansing, MI

Associate Director, MSU Technologies (2008)

Illinois Climate Action Plan Working Group

- Served as a change agent to lead office through a restructuring to focus alignment of patent investment with market opportunity.
- Developed the vision, mission, and strategy to accomplish technology commercialization goals and provided customer service to Principal Investigators.
- Led the day-to-day operations of the office.
- Directly supervised eight academic professionals and four administrative support staff.
- Provided management oversight and guidance of contract negotiations for licenses, material transfers, and related agreements.
- Assisted in strategic planning and preparation of annual operating budgets.
- Represented the office at a variety of meetings involving international, national, university, state, and local governmental officials and industry representatives.
- Provided Intellectual Property seminars for faculty and researchers.

UNIVERSITY OF ILLINOIS, Urbana-Champaign, IL

Senior Technology Manager and Technology Manager (2005 – 2007)

Office of Technology Management

- Performed intellectual property management for the Grainger College of Engineering, Beckman Institute, Holonyak Micro & Nanotechnology Laboratory, Coordinated Sciences Laboratory and Materials Research Laboratory to increase disclosure submissions, patent applications, and licensing opportunities.
- Screened invention disclosures, identified license opportunities, developed marketing strategies for technology, and managed a portfolio of complex technologies and issues.
- Managed the intern program which included recruiting, interviewing, hiring, training, and on-going management of eight graduate student interns.
- Served as guest lecturer for Executive MBA course on entrepreneurship.
- Partnered with the Grants & Contracts office on negotiation of sponsored research agreements that involved intellectual property.
- Developed intellectual property plan for the Center for Design of Biomimetic Nanoconductors and executed throughout ten higher education institutions.
- Developed and executed the marketing plan for a portfolio of technologies

• Negotiated and executed agreements for intellectual property licensing, material transfers, confidentiality, inter-institutional and other related agreements.

FOX DEVELOPMENT CORPORATION, Champaign, IL

Vice President of Investment & Development (2002 – 2005)

Commercial Real Estate Development & Leasing

- Managed over one million square feet of real estate development, including medical office space, research laboratories, commercial office, and retail.
- Managed the development, construction, and leasing of medical outpatient center.
- Facilitated the organization of multi stakeholder task forces to develop proposals for the development of the Research Park at the University of Illinois.
- As managing partner of joint venture successfully was awarded 10-year contract for the private development of the Research Park at the University of Illinois.
 - 200-acre technology hub, designed to encourage research and development partnerships by and between private industry and the University of Illinois.
 - Phase 1-3 buildings, 300,000gsf Over 20 companies attracted and leased space for amenities and proximity to the University of Illinois.
- Led recruitment of tenants to Research Park: Bayer Crop Science, Caterpillar, Motorola, PowerWorld Inc., SAIC Corporation, iCyt Bioscience, and more.

Venture Capital & Private Investment

- Managed \$15 mm in private investment and the operation of two venture capital funds.
- Develop and presented performance reports to investment board and limited partners.
- Led budget development, capital raise, capital restructuring, internal controls, and general accounting for fund entities and companies.
- Champaign Urbana Venture Fund, LLC \$5mm deployed of early-stage investment into Univ. of Illinois based technology startup companies.
- Fox Capital Fund I, LP \$10mm focused on mezzanine level capital investment (debt & equity positions) into small companies with proven sales and profitability.
- Assisted portfolio companies in capital fund raise to achieve fiscal viability.
- Performed accounting duties and prepared tax related work documents for partnerships.
- Portfolio companies with successful exits:
 - Useractive Media developed custom learning management software into a cloud based Tool Integrated Learning Environment. Purchased by O'Reilly Media.
 - Intersymbol Communications grew into a world leader for designing signal processing enhanced mixed signal integrated circuits for long-haul and metro fiber optics. Purchased by Kodeos Communications and then Finisar Corporation.
 - iCyt Visionary Bioscience designed and manufactured highly advanced cell sorting devices for research and industrial use. Company was purchased by Sony Biotechnology and now operates as a standalone subsidiary of Sony.
 - PowerWorld Corporation on-going concern that provides visual tools to the electricity power transmission and generation market providers.
 - Strata Decision Technology, LLC leading analytic platform for financial planning, decision support and continuous cost improvement in healthcare industry acquired by Roper Industries.

KOCH INDUSTRIES, INC., Wichita, KS

Capital Projects Engineering Manager, Terminal Automation Group (1998 – 2000)

- Performed new product proof-of-concept studies, cash flow analysis, and then led capital investment for petro-chemical product development and full-scale production.
- Managed the design, installation, and start-up of Petro-chemical distribution facilities for refined products (gasoline, fuel oil), asphalt, anhydrous ammonia, and petroleum coke.
- Implemented cross disciplinary control methods for the distribution and delivery systems of additives, anhydrous ammonia, asphalt, fuel oil, gasoline, and natural gas.
- Led strategic equipment purchasing to achieve cost savings of 20%.
- Engineering support for plant operations in production and distribution nationally.

UNIVERSITY OF ILLINOIS, Urbana, IL

Nuclear Reactor Lab (1994-1997)

- Senior Reactor Operator, licensed by the Nuclear Regulatory Commission
- Operation and maintenance of 15MW TRIGA nuclear pulse reactor.
- Provide training and instruction on reactor operations to university students, researchers and provided extended on-site operational training for General Atomic TRIGA operators from other facilities.

UNITED STATES NAVY, Charleston, SC

USS Casimir Pulaski, SSBN 633 – nuclear submarine (1989-1994)

- Nuclear reactor propulsion and power plant operations, power plant water chemistry control, and radiological controls on all nuclear systems
- Provided radiation health & environment monitoring for submarine crew of 120
- Diesel engine and generator operator and maintenance
- Operator and mechanic for systems including absorption and refrigerant based chillers, steam turbine and condensate systems, high pressure air and hydraulic systems, general shipboard mechanical systems (pumps/valves/strainers/etc).
- Enlisted at 17 years of age as a Fireman Apprentice (E2) and advanced to Fireman (E3), then Machinist Mate Petty Officer 3rd Class (E4), and finally to Machinist Mate Petty Officer 2nd Class (E5) within my 5 years in the US Navy.

CIVIC SERVICE AND OTHER ACTIVITY

President, Monticello High School Athletic Boosters, 2014 – 2018 Elected Nixon Township Trustee, DeWitt County, IL, 1994 - 1998 Founder / Owner – Strength and fitness gym, 2014 – 2018