## **EMPLOYMENT**

#### STRATEGIC PLANNER, CHIEF FINANCIAL OFFICER

2007-PRESENT

## Arizona University System- Arizona Board of Regents

Phoenix Arizona

I am currently employed as the Strategic Planner and Chief Financial Officer for the Arizona Board of Regents. The Board governs the three public research universities in Arizona; Arizona State University, the University of Arizona, and Northern Arizona University. As CFO and strategic planner I am responsible for developing financial policy, leading the system's strategic planning and performance efforts, overseeing the university capital development plans and requests, developing accountability systems and connecting with community college leaders and economic development leaders related to joint strategic planning. I manage the finances, operations, and human resources of the Board. I am also responsible for working directly with Regents, Presidents of the Universities and their senior staff, members of the Legislature and legislative staff, Governor's staff and business leaders in developing and explaining the various strategies, goals, and funding recommendations included in the strategic plan and Board's funding and tuition policies.

I am lead staff on multiple major projects for the Board including developing a long-term statewide strategic plan, managing the development of decision support models to inform the planning process, managing the development of long-term financial projection models needed to cost out the plan, developing budget recommendations, staffing the Regent's Tuition Task Force, developing tuition and affordability policy recommendations, leading a comprehensive funding model review, managing detailed short-term action plans related to the long-term strategic goals and objectives, and developing accountability systems and reporting dashboards related to the strategic plan.

## VICE PRESIDENT FINANCE, PLANNING, AND PERFORMANCE

2003-2007

## Kentucky Council on Postsecondary Education

Frankfort, Kentucky

I was initially employed as the Vice President for Finance of the Kentucky Council on Postsecondary Education in 2003. Planning and performance functions were added to my duties in 2005. The Council coordinates reform and improvement of Kentucky's postsecondary education system in the framework established by the *Postsecondary Education Improvement Act of 1997* and is the coordinating board for all public universities and community colleges. As CFO and strategic planner, I was responsible for developing financial policy, managing capital requests and planning, leading system wide strategic planning efforts, and developing accountability systems necessary to align with the strategic goals of the system. I managed the operations, internal audit, and finances of the Council. I was also responsible for working directly with Council members, presidents of the colleges, and universities and their senior staff, members of the Legislature and legislative staff, Governor's staff and business leaders in developing and explaining the various financial policies and strategic planning components of the Council.

I was lead on many complex projects for the Council including, developing budget recommendations for the Council and the system of institutions, developing tuition policy recommendations, managing planning and performance functions, developing accountability systems and reporting, managing the Affordability Policy Group, managing a comprehensive funding model review, managing reciprocity agreements, and managing and developing policies for multi-million dollar statewide strategic trust funds.

**Alabama Commission on Higher Education** 

Montgomery, Alabama

I was initially employed as the Director of Finance for the Alabama Commission on Higher Education in 1999. In 2001, I was promoted to Associate Executive Director and given additional duties related to institutional research and information systems. The Commission is the coordinating board for the Alabama colleges and universities. My responsibilities included developing and managing the financial policies for the system, developing an annual unified budget recommendation for the Legislature, managing the student record information system, state coordinator for reporting data and analyses to the federal government, developing analyses and research concerning higher education policies and practices.

I was lead staff on various projects for the Commission including managing the development of a comprehensive database for students and faculty, leading a funding formula study, and was the Commission's representative on Governor's taskforce related to performance based budgeting.

FISCAL ANALYST 1994-1999

## Alabama Legislative Fiscal Office

Montgomery, Alabama

I was employed as a financial analyst for the Legislative Fiscal Office in 1994. The Legislative Fiscal Office is a non-partisan agency that serves the Legislature by providing support for developing legislation and state budgets and analyses of proposed legislation, state agencies, and colleges and universities. I was the senior financial analyst to the Legislature regarding the public community and technical colleges and universities, the Alabama Commission on Higher Education, and economic development agencies in Alabama.

My responsibilities included developing detailed fiscal notes of all proposed legislation related to assigned areas, developing funding distribution scenarios for budget analyses, analyzing and preparing responses to legislative requests, and completing several major research projects for the Department of Transportation funding programs, college and university funding adequacy, and a study related to national merit based college scholarship programs.

#### COORDINATOR, ECONOMIC FORECASTING GROUP

1991-1994

Auburn University, Center for Government and Public Affairs

Montgomery, Alabama

I was employed as a coordinator for the Auburn University Center for Government Economic Forecasting Group. The Economic Forecasting Group was responsible for the tax revenue forecasting model used by the state legislature and the Governor's finance director to develop state budgets. My responsibilities included data collection and analyses, assisting with maintaining the econometric forecasting model and analyses, developing reports for the Governor and Legislature, and assisting with economic cost benefit analyses. I reported to the Director of the Center for Government, who was also lead economist on the forecasting model.

# **EDUCATION**

BACHELOR OF SCIENCE IN BUSINESS ADMINISTRATION	1991
Auburn University	
Double Major: Finance & Economics, with high honor	
Montgomery, Alabama	
MASTER OF BUSINESS ADMINISTRATION	1993
Auburn University	1333
Montgomery, Alabama	
Montgomery, Audumna	
DOCTOR OF BUSINESS ADMINISTRATION-MANAGEMENT	2005
H. Wayne Huizenga School of Business and Entrepreneurship	
Nova Southeastern University	
Ft. Lauderdale, Florida	

## **ACADEMIC**

Adjunct instructor- economics, Auburn University, Alabama

Adjunct instructor- accounting, statistics; Midway College, Kentucky

Dissertation: A critical analyses of the effect of performance funding and budgeting systems on university performance, UMI 3178214

Essays in Education; The History of Desegregation and the Theory of Student Choice, Volume 11, fall 2004

Critical Analyses of Higher Education Desegregation in the Knight vs. State of Alabama Case, 1993, Alabama Commission on Higher Education paper