

## **QUALIFICATIONS SUMMARY:**

- > 16 years of executive-level finance experience in public higher education in California.
- Organize, control and direct business operations of large complex organizations, including all financial functions of budget development, monitoring, and administration.
- ➤ Highly skilled at effective working relationships with Boards, executives, staff, students, governmental and community representatives

## **EDUCATION:**

**MBA** California State Polytechnic University, Pomona. Honors: *Beta Gamma Sigma* **BA Economics** UCLA

## **PROFESSIONAL EXPERIENCE:**

Interim Vice President for Administration & Finance/CFO, San Jose State University, 4/15 – 6/16

Cabinet level executive reporting directly to the President of the University. Provides leadership for administrative and financial strategic planning and direct supervision of financial and business functions; Facilities Development & Operations, Human Resources, Information Technology (through December 2015), University Police& Parking, Spartan Shops (retail and dining services), and the University Title IX Program. Exercise financial oversight responsibility for all five auxiliary organizations.

- Developed 5-Year Capital Outlay Plan, incorporating sustainable practices aligning with financial plans and University priorities. Includes funding for first new academic building in 20 years.
- Secured campus funding and prioritized facilities services to improve critical academic buildings serving 19% of students (FTES) by installing air conditioning, while meeting all environmental impact regulations and CEQA requirements.
- Led yearlong effort that successfully completed negotiations with the City of San Jose for a
  multi-year public-public partnership operating lease of Hammer Theatre; exemplifies leadership
  philosophy of inclusion of all stakeholders, campus and external constituents e.g. City of San
  Jose and Arts Community, in vital engagement strategy for support of academic programs.
- Provided Strategic Financial planning to ensure a financially stable future for the University; led the University out of a \$32 million dollar deficit.
- Effectively worked with Student Government to resolve issues regarding controversial student success fee -- resulting in partnerships with student advocates, administration, and faculty.
- Developed and led Campus Security Master Plan to ensure safety programs are designed and implemented to provide a safe environment for students, faculty, and staff.

# Responsibilities Summary:

- Manage University's \$560 million dollar budget including preparation, justification, and administration of budget process according to university budget guidelines and policies to ensure proper allocation of funds.
  - o Present annual budget to campus community including Academic Senate.
  - Develop transparent budget documents for campus community dissemination; including publishing an annual budget report.
- Provide leadership and vision to a diverse set of business and finance units, with direct management for: 1) Financial Services including Accounting, Financial Systems (Finance and Student Records), Budget Office& Risk Management, Bursar's Office, Accounts Payable, Internal Control and Audit Management, and Procurement and Contractual Services. 2) Facilities Development & Operations including Energy & Utilities Management, Environmental Health & Safety, Facilities Planning, Design & Construction and Facilities Maintenance and Operations. 3) Human Resources including Employee Performance & Development, Employee Relations, Equal Opportunity & Workforce Planning, Personnel Services (Benefits & Payroll), and Workers Compensation. 4)University Police Department including Police Administration & Operations and Parking & Traffic. 6) University Title IX Program. 7) Spartan Shops including University bookstore, dining services, and real estate/property management.
- Reconstituted the University's Emergency Operations Center and serve as the University's executive for the Emergency Operation Center.
- Represent the University's interests with a variety of units within the Chancellor's Office in Long Beach. Serves as a member of the CSU's Chief Administrator & Business Officers organization. Serves as the University's representative on fiscal matters with the Executive Vice Chancellor for Fiscal Affairs of the 23-campus CSU system.
- Serve as the Chief Financial Officer for auxiliaries per Chancellor's Executive Order.
- Maintain effective public relations with local, system, and state constituencies.

# Management & Supervisory Duties:

- Recommend initiatives and changes to improve quality and services for units, departments, divisions, and colleges.
- Work with other units, departments, divisions, and colleges to coordinate workflow and activities to ensure seamless operation.
- Identify and determine cause of problems; develops and presents recommendations for improvement of established processes and practices; initiatives and implements plans to solve problems.
- Maintain contact with customers and solicits feedback for improving services.
- Operate departments, units, and divisions as a team.
- Establish rapport with people from diverse backgrounds.
- Maintain dignity and self-control in difficult situations.

**Associate Vice President of Finance**, San Jose State University, 11/09– present.

Manage University Accounting, Bursar, Procurement and Contractual Services, Accounts Payable, University Budget& Risk Management, and Audit and Compliance.

- Developed and implemented successful Workflow Automation and Document Imaging Application that supports on-line financial transactions including travel approval and reimbursement, requisitions, reimbursements, and e-Invoicing.
- Successfully led the University through periods of significant financial deficits with limited impact to our students, faculty, and staff.

# **Responsibilities Summary:**

- Lead University financial planning and analysis including development of methodologies to calculate costs of services, measures to monitor financial health of the University, maintenance of accurate database for planning and analytical objectives consistent with university decisions, and guidelines to ensure financial stability and solvency.
- Develop financial forecasts and planning to support campus facilities development including securing bond financing for new buildings (Student Union Building, Student Health & Counseling Center, and Campus Village Housing).
- Responsible for University's accounting and financial records (including financial statements) to produce accurate and valid reports, with sufficient internal controls to ensure compliance with professional standards defined by GAAP, the State of California, and the Federal government.
- Manage the collection of University revenues ensuring accurate accounting and timely depositing. Manages fee related debt to the University and the collection of debt.
- Manage the University's procurement and support services processes to include purchasing processes, payment and delivery methods. Negotiate University-wide contracts and programs for high use commodities. Manage property, shipping and receiving and mail services. Manage travel reimbursement policy and process for the University.
- Direct the Finance Service Group's strategic planning and quality improvement processes including the development of meaningful measures/metrics, developing action plans, tracking progress and communicating results.
- Manage the University Financial Reporting system, including data warehouse for campus users. Manage Financial Transaction application for the request and submission of requisitions, direct pay, reimbursements, and travel reimbursements.
- Develop and implement business efficiency initiatives and changes to improve quality and services for campus community, including leveraging system applications when feasible.

**University Budget Director,** San Jose State University, 3/09 – 11/09.

Managed and administered San Jose State University's budget and supported the Vice President of Administration and Finance in overall university financial planning, analysis, and forecasting.

# Responsibilities Summary:

- Designed, developed, implemented and administer budget procedures and policies to accomplish the financial management objectives of the University.
- Prepared and processed budget transactions according to Chancellor's Office and University guidelines to ensure proper allocation of funds.
- Prepared and published annual University budget reports.
- Maintained oversight, in-depth analytical study and investigation of financial and administrative processes according to University decisions and needs to ensure fiscal integrity.

• Provided consultative advice and interpretation on budget and financial matters to all levels of campus administration, based on University needs or requests to assist University departments in budget management.

**Chief Financial and Administrative Officer, Computing & Communications,** University of California Riverside, 6/01 – 3/09.

Directed financial and administrative activities of \$16 million dollar unit with 100 staff. Provided comprehensive IT services to the campus community, including: Enterprise Application Development, Communication Services, HelpDesk Services, classroom technology and faculty instruction support.

# Responsibilities Summary:

- Financial management, oversight, and reporting for \$16 million dollar budget.
- Developed financial reporting system that enables accurate and timely financial reports.
- Identification, negotiation, implementation, and management of multi-year revenue generating licensing agreement with Sprint for Educational Broadband Frequencies (resulting in revenue of \$18 million over 30 years).
- Negotiation and management of multi-year agreements with business partners such as the City of Riverside, and various vendors such as Oracle, CISCO, Sun Systems.
- Project Manager for key projects including; development and implementation of new business model for Voice and Data Services, development and management of campus-wide IT security program, and enterprise application development.
- Development and implementation of central IT Disaster Recovery Program.
- Administrative support and oversight including; Human Resources/Personnel Management (120 full-time staff, plus 60 students), Labor Relations activities (including union employees); Facilities Management for 2 buildings, 8 student labs, 1 data center, plus multiple on-campus staff offices, including disaster preparedness.
- Project management as required to support development of effective internal processes and systems as well as systems for broader campus use.
- Instrumental in the development, enhancement and maintenance of many financial database systems.

Chief Administrative Analyst, Metropolitan Transportation Authority, Los Angeles, 2/97 – 6/01.

Managed financial and administrative functions of largest public transit system in California. Directed analysis and reporting of annual operating and capital budgets in support of bus and rail operations totaling over \$740 million dollars.

# Responsibilities Summary:

- Led Strategic Planning initiatives.
- Managed all personnel functions including non-contract personnel issues; liaison with Labor Relations for contract issues.
- Created and implemented effective operating performance monitoring and analysis activities.
- Generated and presented operational reports to Board of Directors; published weekly and monthly performance reports.

Senior Administrative Analyst, Metropolitan Transportation Authority, Los Angeles, 10/92 - 2/97.

Provided administrative, financial, and system support for General/Administrative Services, including, Human Resources, Procurement, IT, Risk Management, Facilities, Records Management, Printing and Graphics.

Administrative Analyst II, County Transportation Commission (LACTC), Los Angeles, 1991-92.

Project leader for development and implementation of administrative policies including, purchasing and cost controlling policies. Developed and managed comprehensive employee improvement program.

## **COMMITTEE & PROFESSIONAL MEMBERSHIP:**

## Current

San Jose State University Auxiliary Board Positions;

- Research Foundation Board Member
- Research Foundation Finance & Investment Committee Chair

CSU Financial Officers Association (FOA), Associate Member:

Chair, 2014-15 Vice Chair, 2013-14 Secretary, 2012-13

National Association of Chief University Business Officers (NACUBO), Member NACUBO New Business Officer Workshop 2015

Western Association of College and University Business Officers

## Past

CSU Chief Administrator and Business Officer (CABO) Member San Jose State Academic Senate Senator San Jose State University Auxiliary Board Positions;

- Student Union Board Member
- Student Union Finance & Investment Committee
- Spartan Shops Board Member
- Spartan Shops Board Finance & Investment Committee Chair
- Tower Foundation Board Member
- Tower Foundation Finance & Investment Committee Chair

University of California (UC) System-wide Information Technology Policy Committee

UC Information Technology Policy and Security Committee

UC Digital Millennium Copyright Act System-wide Task Force

LA Metropolitan Transportation Technical Advisory Council

LA Metropolitan Transportation Bus Operations Subcommittee