

Professional Summary

- Senior Financial Officer with more than 20 years of experience leading and directing financial and administrative operations of a public academic medical center and a multi-national professional services firm serving clients in the healthcare, higher education, and not-for-profit industries.
 - Values-centered leader who consistently demonstrates integrity, teamwork, self-discipline, and professional will in focused areas of finance, accounting, strategic planning and management of administrative services. Demonstrates the capacity to adapt to challenging and uncertain environments and thrives on leveraging skills and experience to generate meaningful long-term results and lasting success for organizations.
 - Cultivates a positive work environment through building trusting and enduring relationships throughout the organization. Inspires and motivates others to live and achieve organizational mission, vision, and values through his personal actions and mutual respect for others.
-

Professional Experience Overview

State University of New York Upstate Medical University, Syracuse, NY

Senior Vice President for Finance and Administration – January 2015 – Present

Senior Association Dean for Finance, College of Medicine – March 2018 - Present

Vice President for Finance and Administration – July 2014 – December 2014

Interim Vice President for Finance and Administration – December 2013 – June 2014

- Provide stewardship over the University's State and non-State academic, research and clinical resources, including multiple special purpose campus-related entities, with an all-funds annual operating budget of \$1.4 billion. Facilitate the growth of financial and capital assets and work closely with the University President, Deans, Hospital CEO, Clinical Practice Plan President, and other senior leaders to effectively manage and allocate resources.
- Lead and provide strategic direction, leadership, and oversight over the following university-wide finance and administrative departments: Finance, Accounting and Budgeting, Sponsored Programs, Shared Business Services (Payroll, Contracts and Campus Purchasing, and Accounts Payable), Facilities, Capital Planning, Parking Services and University Police. Led Information Management and Technology and Internal Audit and Advisory Services.
- Serve as a member of the President's cabinet (University Executive Committee) along with senior leaders representing the academic, research and clinical missions of the University providing direction related to Upstate's mission, vision, strategic plan, presidential initiatives, and mission-critical operational decisions. Collaborate with senior leaders to improve alignment and financial performance across all missions and components of the University.

-
- Provide and enhance financial transparency specific to academic, research, and clinical missions of the academic medical center through frequent presentations to various internal and external stakeholders, including the Upstate Council, Upstate Executive Committee, College Deans, Department Chairs, Faculty Governance, Clinical Practice Plan (UUMAS) Governing Board, Upstate Foundation, SUNY, and local, state and federal representatives.
 - Led efforts to transition to a new all-funds global budget process across all components of the academic medical center. Developed responsibility-centered management (RCM) financial reporting and budget model to guide financial and resources allocation decisions for the academic and research mission. Partner and engage with University leaders to ensure a fair and equitable approach and identify additional resources for investment.
 - Supported and advised Interim President during an unanticipated leadership transition and organizational crisis from late 2013 to early 2016. Played a key leadership role in helping to restore institutional reputation and public trust. Served as the primary liaison for internal and external agency inquires and internal and external review reviews, proposed solutions, and implemented corrective actions.
 - Led efforts to reorganize the structure and operations of the Chief Administrative Officer (CAO) Fund and implement new guidelines and practices, including a new SUNY procedure. Established an agreement with the Upstate Foundation to leverage its strengths and to serve in a fiduciary capacity by managing cash and investment accounts of approximately \$50 million and providing governance and oversight over the activities of the Fund.
 - Implemented focused reviews of the shared business and administrative services across the academic medical center to assess the effectiveness and efficiency of services and the allocation of costs. The multi-phased effort identified \$3 million in new resources for the academic and research mission over a two-year period and a reduction in the tuition growth rate by 50% over the prior year. Frequently promotes SUNY initiatives, including shared services across SUNY campuses and enhanced communication and coordination.
 - Reorganized the operations and appointed new leadership resulting in improved organizational culture, alignment, efficiency, performance, and communication in the areas of Shared Business Services, University Police, Internal Audit, Institutional Compliance, and Facilities and Capital Planning. Centralized environmental services to produce improved services, efficiencies and cost savings and negotiated new contractual services agreements resulting in operational savings.
 - Led efforts to start-up and stabilize the operations of Geneva Tower, a new student housing complex that was completed in 2012 through a \$32 million tax-exempt bond issuance, resulting in a bond rating of A+ being maintained and a stable outlook from Standard and Poor's while confronted with changes in leadership and a challenging fiscal environment.

-
- Serve in leadership and governance roles for a number of committees and campus-related entities, including:
 - The Research Foundation for SUNY – Deputy Operations Manager
 - Upstate University Hospital – Governance Committee and Finance Committee member
 - Clinical Practice Plan (UUMAS) – Governing Board Member (ex-Officio, non-voting)
 - The Upstate Foundation, Inc. – Finance and Investment Committee Member
 - Upstate Properties Development, Inc. (Property Management Corporation) – President, former Treasurer
 - Faculty-Student Association of UMU, Inc. (Auxiliary Services Corporation) – Board Member and Treasurer
 - Middle States Commission on Higher Education – Steering Committee Member
 - Liaison Committee on Medical Education (LCME) - Contributor
 - Strategic Planning – Steering Committee Member and Team Leader
 - Disability Inclusion Task Force - Member
 - Executive Search Committees – Various

Assistant Vice President for Finance – April 2005 – November 2013

- Provided strategic direction over the financial and business affairs of the University specific to State and Research Foundation activities through leading professionals in the following departments: Accounting and Budgeting, Sponsored Program Accounting and Post-Award services, Bursar's Office, Payroll, Contracts and Campus Purchasing, Accounts Payable, Property Management, Parking, and Capital Budgeting.
- Created annual and multi-year budgets, monitored financial results, develop strategic plans and manage certain activities within the education and research missions of the University. Collaborate frequently with senior management across the components of the University.
- Led efforts to redevelop properties for the benefit of the University, including acquisition of properties, the creation of a tax-exempt property holding corporation, the issuance of \$32 million in tax-exempt bonds for a new student housing facility, meeting with key City and County officials, assessed feasibility and financing options, and resolved property tax matters.
- Led and supported special projects and activities, including performance improvement and cash flow/operating budget reporting for University Hospital, financial reviews of proposed mergers and acquisitions, revenue cycle initiatives, feasibility studies for new academic and research programs and capital projects, negotiations with employee labor unions and other parties, sponsored research indirect cost rate proposals, and focused reviews of departmental operations and finances, including investment and divestment recommendations.
- Develop vision and future strategies through serving on key institutional initiative committees, including the Community General Hospital Transition Team, Physician Contracting, Strategic Operations and Planning, Hospital Capital Review, Employer of Choice, and Sustainability and Energy Conservation.

PricewaterhouseCoopers LLP, Syracuse, NY

Senior Manager, Assurance and Advisory Services - July 1993 – March 2005

- Provided audit and consulting services primarily to national, regional and local healthcare systems, universities, and research institutes including Children’s Hospital of Philadelphia, Catholic Health System (Buffalo), Catholic Health East (Philadelphia), Crouse Health System (Syracuse), United Health Services (Binghamton), Guthrie Health (Sayre, PA), Saint Vincent Hospital (Erie, PA), and Trudeau Institute.
- Presented results to client senior management and board of directors and advised on accounting and reporting implications of complex financial transactions, including capital financing, derivative financial instruments, restrictive debt covenants, investments, pensions and post-retirement benefits, self-insurance, business combinations, and donor contributions.
- Led special projects, including agreed-upon procedures for tax-exempt bond offerings, due diligence reviews of proposed mergers and acquisitions, developed consistent reserve methodologies for five merged hospitals, and determined hospital bankruptcy accounting and reporting requirements.
- Prepared and reviewed multi-year operating and cash flow projections to determine future viability of operations and assessed internal control to identify operational and financial risks and opportunities to create efficiencies and enhance profitability.

Certification

- New York State Certified Public Accountant

Education

- Syracuse University, Whitman School of Management, Syracuse, New York
Masters in Business Administration
Beta Gamma Sigma inductee
- State University of New York, College at Oswego, Oswego, New York
Bachelor of Science in Accounting
Member of Division III Men’s Baseball Team

Recognition / Professional Memberships / Community Involvement

- Upstate Leadership Academy - Faculty and Founding Member
- State University of New York Leadership Program – Class of 2007
- Leadership Greater Syracuse – Certified Community Leader - Class of 2010
- President’s Award Recipient - Strategic Planning Team contributions - 2011

Recognition / Professional Memberships / Community Involvement (continued)

- State University of New York Business Officers Association
- Association of American Medical Colleges – Member and Upstate Principal Business Officer
- National Association of College and University Business Officers - Member
- Healthcare Financial Management Association - Member

- University Hill Corporation – Board Member and Treasurer
- Fayetteville-Manlius Little League – Youth Coach and Former Board Member
- Fayetteville-Manlius Youth Basketball League – Youth Coach
- St. Daniel Church – Prior Pastoral Council Member and Finance Committee Chair
- Aurora of Central New York – Former Board Member and Treasurer