

# Gerald L. Hector, CPA

## Professional Experience

### University of Central Florida

12/2020 - Present

*The University of Central Florida is one of twelve institutions that make up the state of Florida's State University System (SUS). An institution on the rise that has a budget of approximately \$2.3 billion. An ever-growing national presence in cutting edge research and industrially impactful academic offerings, the university is poised to go even higher with the launching of our strategic plan, "Unleashing Potential."*

### Senior Vice President for Administration and Finance

#### Responsibilities:

Reporting to the president, I am responsible for all functions that oversee the following units: Human Resources, Campus Safety, Financial Reporting, Financial Management, Procurement, Taxation, Budget, Planning and Analysis, Student Accounts/Bursar, Treasury and Controller's Office. Through December of 2024 oversaw all matters relating to the Facilities, Grounds, Real Estate, Business Services and Auxiliary Enterprises.

#### Accomplishments:

- ❖ Oversaw the issuance of structured debt in both bank loans and capital market debt to finance a \$100 million renovation of the FBC Mortgage Stadium in the fall of 2024.
- ❖ Reestablished working relationships and partnerships with the Division of Bond Financing, and staff at the Board of Governors to ensure alignment on efficient processes and projects.
- ❖ Implemented the management concept of OATE (Ownership, Accountability, Transparency and Empowerment) within all units of the division to undergird our operating philosophy of a "Culture of Excellence."
- ❖ Led the effort for the implementation of a new \$50 million Enterprise Resource Planning (ERP) software in Workday. We went live with the system on July 1, 2022. Integrated all Direct Support Organizations (DSOs) into the main university's accounting and finance platform for the first time in the university's sixty-three-year history. The process significantly reduced accounts in the ledgers and streamlined reporting lines and functions for a better approach to the recording, summarizing, and reporting of financial information. Consolidated four disparate accounting systems into one that allows for greater transparency into the operations of all entities associated with the university.
- ❖ Played a key role in the athletics program moving from the American Athletic Conference to the Big 12 Power Four conference and served on the search committee that brought the current Athletic Director to the university.
- ❖ Completed all audits of eight DSOs inside the new Workday system by October 31<sup>st</sup> each year. The main campus audits were produced in a timely manner to meet state reporting obligations. All audits since the Workday implementation were received with unmodified opinions. The highest level of attestation an organization can receive. Additionally, there were no audit findings or letter comments. The same is expected for all future audits.

- ❖ Led the effort to implement a new budget planning tool in Adaptive Planning. Went live with the new system on July 1, 2022. That achievement led to an integration of all DSOs into one budget presentation for greater transparency to senior leadership and the Board of Trustees (BOT).
- ❖ Established a new reporting protocol where monthly Management Discussion and Analysis (MDA) reporting is provided to senior leadership, and quarterly reporting of all nine entities presented to our Board of Trustees. This was the first time that full sets of management reports covered all financial entities of the university in a single report during a fiscal year. These reports continue to be produced as they assist senior management and the Board of Trustees to make data driven decisions around the university's comprehensive finances.
- ❖ Created a new cash management protocol for reporting on all cash and cash equivalents at the end of each month with projections through the end of the fiscal year. For the most recently concluded fiscal year of June 30, 2024, the new strategy yielded an approximate 8% return, providing almost \$52 million of much needed investment earnings to augment operational resources. It is expected that as of June 30, 2025, we will have similar results based on our cash management protocols.
- ❖ Led the effort for the implementation of a new incentive-based Responsibility Center Management (RCM) budget model. Model launch was July 1, 2022. Ongoing refinement is under my purview. The process created "Profit and Loss Statements" by college and units for greater transparency into how resources are allocated across all fund types. The model that puts the university on a path to understanding the return on investments for funds invested in colleges and units.
- ❖ Played a role in developing and launching the strategic plan "Unleashing Potential" that was adopted by the Board of Trustees in the fall of 2022. Primarily responsible for the fourth pillar of Innovation and Sustainability by seeking alternative revenue sources and bringing greater efficiency to all administrative and financial operations to reduce costs for more robust investments to be made in the academic core.
- ❖ Leading the effort to transform the business processes of the university through the Service Enhancement Transformation (SET) project. Launched a new shared service model that supports SET launched on July 1, 2022. Currently we are revamping all business operating procedures to streamline how transactions are processed to reduce payment terms and hiring timelines for both savings and efficiency.
- ❖ Created the first ever Chief Financial Officer's Council at the university that includes all the Chief Financial Officers from all eight DSOs.
- ❖ Served as Chairman of the UCFCC, UCFSC, and UCFFC which are all DSOs of the university. Transitioned to the CEO roles to ensure that the state's sunshine laws are effectively managed. Currently these three DSOs operate as businesses versus the support role they had in prior iterations.
- ❖ Instituted new campus communications programs entitled "***Dollars & Sense***", and "***From the CFO***" to keep the campus apprised of the change management projects across the institution. "***Dollars & Sense***" are town hall styled meetings that occur after each board of trustees' meeting. "***From the CFO***" are quarterly articles written to the campus to keep them updated on our transformation efforts. Frequency is also determined based on urgency of topics that must be addressed.

- ❖ Instituted the “Weekly CFO Update” to keep all vice presidents and deans apprised of the financial and operational changes that would affect them as all major change efforts mature on campus.
- ❖ Created the position of University Treasurer position to manage risks associated with a more proactive liquidity management program.
- ❖ Created a working capital advisory committee to provide counsel on market vagaries around short-term working capital management, to keep our funds always working on our behalf.
- ❖ Reorganized the division within the first month of arrival to position personnel to realize the goals of the president and the board of trustees. That included strengthening the authority and scope of the University Controller.
- ❖ The division of Administration and Finance oversees four campuses, that includes a teaching hospital and the number one hospitality school in the nation.
- ❖ Created the university’s Real Estate office to oversee all land holdings and assets with a view towards monetizing this portfolio to drive the objectives and mission of the university.
- ❖ Completed a full marginal revenue analysis of all academic programs to understand, “How Much Does It Cost to Educate a Knight”. The work is ongoing as we continue to refine our budget and administrative practices and processes.

## **Morehouse College**

**05/2019 – 12/2020**

*Morehouse College is one of the nation’s premier Historically Black College and University (HBCU) and remains a top choice of young black men who are interested in being social entrepreneurs and making long lasting impacts on the nation and the world.*

### ***Executive Vice President and Chief Business Officer***

#### **Responsibilities:**

Reporting to the president, I was responsible for Human Resources, Information Technology, Controller’s Office, Treasury, Tax Compliance, College Policy, Campus Operations, Facilities and Grounds, Risk Management and Insurance, College Compliance, Student Accounts, Financial Aid, Auxiliary Services, and Legal (as of June 2020)

#### **Accomplishments:**

- ❖ Restructured the division of business and finance within the first two weeks of tenure.
- ❖ Transferred the long-term portfolio custodial accounts my first month of tenure and oversaw a portfolio that grew exponentially since my arrival (51%)
- ❖ Implemented the management concept of OATE (Ownership, Accountability, Transparency and Empowerment) within all divisions to undergird our operating philosophy of a “Culture of Excellence.”
- ❖ Cast a new vision around how the college will transform its operations around people, processes, and performance (the three Ps)
- ❖ Found mentors within higher education for all my direct reports by teaming them up with former direct reports who are now in senior roles at larger institutions. This was one of several key strategies around succession planning.
- ❖ Created and Co-Chaired the college’s first ever Institutional Effectiveness and Budget Committee (placed students, faculty and staff on the committee).

- ❖ Chaired the college's first ever Academic Costing Committee that studied the cost structure of the academic units (report delivered to president in June of 2020), "The Cost of Educating a Morehouse Man."
- ❖ Completed a "skinny" ten-year master plan that has been woven into a full college strategic plan that was passed by the Board of Trustees in October of 2020.
- ❖ Co-Chaired an effort to revamp the entire enrollment management process from Admissions through to students' matriculation (included advising and student success).
- ❖ Led all negotiations for four (4) potential public/private partnerships that would monetize underdeveloped and unused parcels of land in the growing West End of Atlanta.
- ❖ Revamped the policy approval process to include tiered committees and assigned accountability and responsibilities to Executive Sponsors for every policy at the college.
- ❖ Led an effort to revitalize the research program of the college as a part of the college's revenue diversification strategy.
- ❖ Led the multi organization (including the Department of Education and several of the nation's private loan service providers) effort around the Student Success Program from Mr. Robert Smith, and its \$34 million effort to pay off student debt for the Class of 2019.
- ❖ Created both Facilities and Information Technology intake committees to monitor projects more holistically and transparently for a broad cross section of the campus.
- ❖ Created financial dashboards for senior leadership and the board of trustees. This allowed for data driven decisions to be made during a fiscal year.
- ❖ Started the process of extinguishing the total debt portfolio through the Cares Act before my departure when it was consummated.

## **Cornell University**

**08/2016 – 12/2018**

*Cornell University is one of the nation's eight Ivy League institutions. It has an annual operating budget of \$4.5 billion, with \$13 billion in assets as of June 30, 2017. The endowment is approximately \$7 billion. The institution has approximately \$1.3 billion in debt as of June 30, 2017. Enrollment is approximately 15,000 undergraduates, 8,000 graduate students and professionals, and is served by 14 schools/colleges across four campuses.*

## ***Vice President for Financial Affairs and University Treasurer***

**10/2017 -12/2018**

### **Responsibilities:**

Reporting to the Executive Vice President and Chief Financial Officer, I was responsible for the following offices and functions: Controller, Tax, Procurement, Sponsored Financial Services (Post Award), Payroll, University Business Service Centers, Bursar, Treasury, and the University Policy Office. Assumed the Treasurer's role in October of 2017.

### **Accomplishments:**

- ❖ Maintained the responsibilities of the Vice President for Financial Affairs.
- ❖ Completed a total transformation of the accounting and finance staff for the Division of Financial Affairs.
- ❖ Oversaw a team of three individuals that managed a debt portfolio of approximately \$1.3 billion.
- ❖ Led a treasury team that negotiated terms for a \$150 million private placement debt structure in June of 2018 as part of the university's first "new money" issuance in almost a decade.
- ❖ Secured financing for \$150 million of a \$250 million residential housing complex approved by the Board of Trustees. The effort was split between the \$150 million private placement transaction, and \$100 million in tax exempt bond financing.

- ❖ Collaborated with the Investment Office to oversee the updating of our \$137 million outstanding commercial paper self-liquidity thresholds.
- ❖ Managed the working capital program, intermediate cash, and lines of credit for the university.
- ❖ Reorganized the treasury function to improve aspects of cash management and upgraded the skill sets needed by restructuring roles and responsibilities and changing job functions considering enhanced PCI compliance and the need for greater campus engagement.
- ❖ Conducted a full assessment of our short-term cash management practices and revised the investment options of working capital to drive greater returns. Drove short term returns by approximately 25bps to 30bps.
- ❖ Created a cross functional group of key stakeholders to monitor cash flow in our decentralized environment. The group met quarterly and was comprised of representatives from Advancement, Budget, Treasury, Facilities, and Sponsored Programs (Post Award).
- ❖ Renegotiated our corporate card program agreements to increase rebate percentages by 42bps that translated into estimated additional rebates of approximately \$300K-\$400K per year.
- ❖ Streamlined credit card programs utilized for purchasing by increasing both limits on cards and bid limits on contracts to increase the options and flexibility for end users to make purchases timely and effectively.
- ❖ Completed a yearlong study of procurement practices and launched a pilot phase of testing findings that allowed for greater opportunities to procure products and services faster.
- ❖ Co-Executive Sponsor for the Workday Time Tracking time management system implementation that replaced the older Kronos system.
- ❖ Executive Sponsor for the Concur travel system implementation.
- ❖ Chaired the inaugural Credit Card Advisory Group (CCAG) that was tasked with understanding all facets of the Payment Card Industry (PCI) requirements and ensuring that the university was aware of the risks and exposures in its decentralized environment.
- ❖ Relocated the Treasurer's office from a satellite location into the main operating facility of the division to take advantage of closer proximities and to enhance the cohesiveness of the team.
- ❖ Launched a successful RFP process and selected a vendor (Kyriba) that assisted the university in automating its cash management process.

***Vice President for Financial Affairs***

***08/2016 – 09/2017***

***Responsibilities:***

Reported to the Executive Vice President and Chief Financial Officer and was responsible for the following offices: Controller, Tax, Procurement, Sponsored Financial Services (Post Award), Payroll, University Business Service Centers, Bursar, Treasury, Risk Management and University Policy Office.

***Accomplishments:***

- ❖ Managed all aspects of recording, summarizing, and reporting of consolidated financial information, including financial statements.
- ❖ Oversaw the relationships with audit and tax professionals who provided services to the university around annual audits and IRS filings.
- ❖ Oversaw the treasury functions of the university that covered all three campuses. This was prior to adding the title Treasurer.

- ❖ Oversaw the management of financial interactions with the main campus in Ithaca and campuses in NYC at Weill Cornell Medicine, and Cornell Tech. There were also limited interactions with our campus in Qatar.
- ❖ Worked with several team members to establish a WOFE (Wholly Owned Foreign Entity) in China, and nonprofits in India.
- ❖ Managed a staff of approximately 130 accounting and finance professionals.
- ❖ Upgraded the staffing in the Controller's organization from two CPAs upon my arrival in the summer of 2016 to nine by the end of my tenure in December of 2018. The goal was to strengthen and reshape the general accounting functions to be prepared for significant FASB changes over the next three to four years.
- ❖ Reorganized the division to have five direct reports based on key functional groups in the division that drove our transformation efforts.
- ❖ Created a new discussion series "DFA Conversations" to engage the campus on a host of topics to connect the division to our decentralized operations. Meetings were held monthly with each unit in the division making a presentation about their services and projects.
- ❖ Instituted a professional development program and created "professional development arcs" for each unit within the division to create a realistic career path for aspiring leaders to follow.
- ❖ Launched a division wide transformation effort around the tenets of "People, Process and Performance" undergirded by the principles of Ownership, Accountability, Transparency and Empowerment. The effort was designed to have every member of the division thinking about the changes we had to undertake, and to set a firm foundation for future growth and development within the division.

## **Ithaca College**

**07/2013 – 07/2016**

*Midsized liberal arts institution located in Ithaca, NY with an enrollment of approximately 6,700 undergraduates. The total budget was approximately \$230 million, with assets totaling \$759 million. Total debt amounted to approximately \$150 million.*

### ***Vice President for Finance and Administration***

#### **Responsibilities:**

- ❖ Reported directly to the president of the college and was responsible for the following offices and functions: Financial Services, Budget and Planning, Endowment and Investments, Facilities, Grounds, Technical Services, Dining Services, Print Production, Campus Store, Campus Center and Event Services, Auxiliary Services, Energy Management and Sustainability, Information Technology Services, Post Office, Purchasing and Procurement, and Identification Management.
- ❖ Member of the President's Council which is the final decision-making body to advise the president on major institution wide decisions.

#### **Accomplishments:**

- ❖ Restructured the budgeting methodology from incremental budgeting to the more strategic Zero-Based Budgeting within the first year of my tenure.
- ❖ Brought more ownership, accountability, and transparency to all financial functions of the college through the launching of the "***Dollars and Sense***" monthly educational series.
- ❖ Completed a ten-year master plan with a comprehensive deferred maintenance review from which the data drove future strategic decisions around capital and infrastructure planning.

- ❖ Instituted a formal five-year deferred maintenance strategy to address almost \$188 million in needed repairs and upgrades discovered through a facilities audit.
- ❖ Served the Finance, Building and Grounds, Audit, and Investment committees of the Board of Trustees.
- ❖ Managed a debt portfolio of approximately \$165 million of both fixed and variable rate strategies, with an eye towards creating balance sheet strength while maintaining cash flow for critical needs in information technology and facilities.
- ❖ Redesigned and reorganized the Information Technology department and instituted its first ever five-year strategic plan that increased the use of modern technology to drive efficiency and operational effectiveness in both the academy and administrative units.
- ❖ Completed the college's first solar energy deal with a private partner to provide approximately 10% of annual energy needs.
- ❖ Renegotiated power purchase agreements to save almost \$300K per year from a 2014 baseline. This was the first major initiative completed against a Climate Action Plan passed in 2009 with a carbon neutrality date of 2050.
- ❖ Worked with the Investment Committee of the Board of Trustees to revisit the overall vision and allocations of the long-term portfolio of approximately \$270 million to address both growth and intergenerational aspects of institutional portfolio management.
- ❖ Enhanced the endowment spend policy to strengthen budget predictability for cash flow planning and execution of strategies.
- ❖ Restructured approximately \$80 million worth of debt in the first two years of my tenure to extend favorable terms in a low-interest rate environment, but more importantly to garner synthetic fixed rates for budget certainty through derivatives and other financing vehicles.
- ❖ Reshaped leadership team by incorporating behavioral tenets around People, Process and Performance (the Three Ps). The division leadership team became more adaptive and responsive to the change efforts launched on campus, but more importantly to the challenges that higher education faced at the time.
- ❖ Within the first year of tenure, recruited and filled two key Associate Vice President roles in major areas of focus for the success of the college's transformation efforts. Functioned as both the Vice President and Associate Vice President during the transitions to get a good understanding of the issues relevant to the campus to allow for the right decisions to be made on the final candidates.
- ❖ Led the college's effort in a partnership with Cornell University and Tompkins Cortland Community College to establish a first of its kind Business Incubator in downtown Ithaca. The incubator was officially launched in September 2014.
- ❖ Led the college's efforts to engage around complying with New York Governor's tax-free initiative, Start Up New York. The initiative required the college to partner with startup businesses to take advantage of substantial tax breaks and spur economic growth. The effort was still in its nascent stages upon my departure.
- ❖ Co-Chaired the Institutional and Effectiveness Budget Committee for the college.
- ❖ Chaired the Facilities Planning Committee for all campus construction and renovations.
- ❖ Managed a division of approximately three hundred and thirty (330) professionals and staff.
- ❖ Played a leadership role in addressing the campus climate concerns between students and the administration. The division led by example by having weekly lunch meetings to discuss this topic during calendar year 2015 when many institutions had to face this issue head on.

**Johnson C. Smith University****10/2004 – 05/2013**

*Small liberal arts institution located in Charlotte, NC with an enrollment of approximately 1,500 undergraduate students. The total budget was approximately \$50 million, and upon departure, total debt was approximately \$4 million. Considered an HBCU, it is also a member of the United Negro College Fund, Inc.*

***Vice President of Business and Finance*****Responsibilities:**

- ❖ Reported to the president and was responsible for the following offices and functions: Accounting and Finance, Endowment, Student Accounts, Motor Pool, Facilities, Grounds, Technical Services, Post Office, Purchasing and Procurement, Risk Management, Payroll, Campus Police and Auxiliary Services.
- ❖ Member of the President's Administrative Council that was the final decision-making body at the university.
- ❖ Member of the Institutional Effectiveness Committee.

**Accomplishments:**

- ❖ Managed an annual budget of approximately \$46 million, with total assets of approximately \$127 million, a growth of twenty seven percent (27%) during my tenure.
- ❖ Managed the University's endowment of approximately \$53 million, a growth of thirty four percent (34%) during my tenure.
- ❖ Grew the University's unrestricted cash reserves from less than \$1 million to approximately \$10 million in four years.
- ❖ Managed the University's overall debt strategies for capital financing on campus wide projects.
- ❖ Renovated and repurposed six buildings and completed three new construction projects.
- ❖ Completed negotiations with Mecklenburg County to upgrade and replace an eight-lane track that served a major community purpose to enhance the relationship between the county and the university. The negotiations resulted in a new \$1 million surface being installed.
- ❖ Reorganized the Division of Financial Affairs to streamline processes, and to create three new units that were not present upon arrival at the university but were essential to its operations.
- ❖ Led the effort to change the University's ERP system which allowed for automated reporting to Budget Managers across the campus, eliminating the need for paper and printed materials.
- ❖ Streamlined the budget and accounting processes so that Budget Managers could manage their own expenditures at a departmental level.
- ❖ Served the Budget and Finance, Audit, Investment, and Insurance committees of the Board of Trustees.
- ❖ Managed a staff of twenty people (20), plus all contracted vendors for the University in Facilities and Custodial operations.
- ❖ Led the Business Office during its 2006 reaccreditation efforts where the university did not receive any findings from SACSCOC. The effort was a year and a half process after my arrival and required working closely with the president to turn the finances around quickly to meet compliance.

**United Negro College Fund, Inc.****11/1998 – 10/2004**

*The nation's oldest fundraising organization for Historically Black Colleges and Universities. Founded in 1944, the organization supports approximately 39 institutions directly through its efforts, and raises funds for non-members*



*as well. It is best known for its slogan, "A Mind is a Terrible Thing to Waste." Total revenues are approximately \$79 million, total assets are approximately \$768 million, and total debt is approximately \$31 million.*

***Corporate Controller (November 1998 – October 2004)***

**Responsibilities:**

Reported to the Vice President and Chief Financial Officer and was responsible for the following offices and functions: Controller's Office that included Treasury, Accounts Payable, Financial Reporting, Payroll, Telethon Support, and Investments (prior to a formal CIO being hired upon my recommendation).

**Accomplishments:**

- ❖ Managed an operating budget of approximately \$30 million, with programmatic expenses of approximately \$100 million annually.
- ❖ Managed and maintained the general ledger, cash management and all accounting related matters for the organization while working closely with the Chief Executive Officer to create and enhance major scholarship and academic programs.
- ❖ Created the financial framework for the landmark \$1 billion Gates Millennium Scholars program in September of 1999.
- ❖ Assisted in the negotiation of having the financial assets of the Gates Millennium Scholars program turned over in a lump sum for the organization's management.
- ❖ Oversaw the annual \$50 million annual distribution necessary to operate the Gates Millennium Scholars program.
- ❖ Monitored the recording, summarizing, and reporting of all organization's assets which amounted to \$964 million as of March 31, 2005 (departed position during the fiscal year ended March 31, 2005).
- ❖ Monitored the accounting and GAAP reporting for the defeasance strategy of investing applied to the Gates Millennium Scholars program assets.
- ❖ Worked closely with the Chief Investment Officer to update the accounting for the program back to the Bill and Melinda Gates Foundation.
- ❖ Completed the final accounting and reporting for the \$280 million Capital Campaign 2000.
- ❖ Created the financial framework for the \$130 million Technology Enhancement Capital Campaign.
- ❖ Monitored and supervised the back-office operations for the annual An Evening of Stars Celebration (a \$14 million dollar effort) that included supervising over 350 individuals receiving approximately 11,000 telephone calls over two days.
- ❖ Provided financial oversight for the Operation Bang Direct Mail campaign that yielded on average \$5 million dollars each year of unrestricted resources.
- ❖ Served as the financial liaison between senior management and the Board of Directors (including the Audit, Budget, and Investment Committees).
- ❖ Provided the accounting expertise to spin off the federal programs of UNCF into the UNCFSP (a separate entity).
- ❖ Monitored the annual unrestricted distributions of approximately \$28 million dollars to the 39 (during tenure) member institutions that made up the organization's membership.
- ❖ Monitored the accounting and reporting for approximately 450 scholarship programs and the Frederick D. Patterson Research Institute.
- ❖ Monitored and managed the accounting for a portfolio of approximately 90 special events across the United States that netted approximately \$5 million dollars annually.

- ❖ Provided the accounting services and expertise to twenty-five area offices (during tenure) across the United States.
- ❖ Managed a staff of fifteen (15) people.

### **Deloitte and Touche Washington DC**

**08/1993 – 11/1998**

*Big six (at the time) accounting firm specializing in attestation, tax, and consulting services. A global company with offices located in almost every major city in the United States and the world.*

### ***Public Accountant***

#### **Responsibilities:**

Reporting to team leads (i.e. engagement partners and managers), I provided attestation services for clients that ranged from international independent power plants to nonprofit organizations. My total client base was more than \$3 billion.

#### **Accomplishments:**

- ❖ Worked with the firm's tax department to ensure total compliance with all federal and state regulations and provided business advisory services.
- ❖ Specialized in multinational independent power utilities and nonprofit organizations.
- ❖ Provided accounting expertise regarding the building and commissioning of several independent power plants both nationally and internationally.
- ❖ Reviewed and audited complex accounting transactions pertaining to foreign energy contracts and various derivative instruments.
- ❖ Generated financial information to assist with FASB 109 tax calculations for multinational entities.
- ❖ Reviewed 10Q and 10K filings for one major public independent power plant.
- ❖ Served as a member of the firm's Minority Initiative Council.
- ❖ Selected as a trainer for the implementation of the firm's AS/2 audit software in the Mid Atlantic practice office.

### **Education and credentials**

- ❖ Currently engaged in course work for an EdD in Higher Education Administration at UCF
- ❖ Graduate of LifeWorks Orlando, June 2024
- ❖ Certified Public Accountant, State of Florida License Granted, November 2022
- ❖ Masters of Christian Thought, Gordon Conwell Theological Seminary, May 2017
- ❖ Institute for Educational Management, Harvard University, July 2015
- ❖ Common Fund Endowment Institute Level II, Yale University, July 2012
- ❖ Common Fund Endowment Institute Level I, Yale University, 2010
- ❖ College Business Management Institute, University of Kentucky, 2008
- ❖ Certified Public Accountant, State of Maryland License Granted, July 1998
- ❖ Bachelor of Business Administration, Howard University, with honors May 1993, Accounting

## Professional Activities

### Boards and Committees:

- ❖ Board Member, Winter Park Institute, Orlando Florida
- ❖ Associate Minister, The Hope Church, Orlando Florida
- ❖ Mentor and Faculty Member for the Higher Education Leadership Institute at Clark Atlanta University (September 2022 to present)
- ❖ Chief Executive Officer for UCFCC, UCFSC, and UCFFC simultaneously (June 2023 to present)
- ❖ Board Chair for UCFCC, UCFSC, and UCFFC simultaneously (September 2021 to June 2023)
- ❖ Member NDAA Advisory Group (December 2018 to 2020)
- ❖ JHUA Executive Committee (December 2018 to present)
- ❖ Board Member and Treasurer, Gordon Conwell Theological Seminary (October 2017 to present)
- ❖ Board Member, Air Services Board of Tompkins County (October 2016 to December 2018)
- ❖ Board Member, Hospicare, Ithaca, New York (June 2016 to December 2018)
- ❖ Board Member, EACUBO (June 2017 to December 2018)
- ❖ Member, Program Services Committee, EACUBO (June 2016 to December 2018)
- ❖ Council Member, Research Institutions, NACUBO (National Association of College and University Business Officers). Term ended in 2018
- ❖ Member, Blue Ribbon Panel for Tompkins County Library System (2014).  
Recommendations forwarded to City Council and Legislators for consideration
- ❖ Chairman, National Risk Management Subcommittee Educational & Institutional Insurance Administrators, Inc. (EIIA) (2011 – 2013)
- ❖ Member, Joint Advisory Council for Educational & Institutional Insurance Administrators, Inc. (EIIA) (2007 – 2013)
- ❖ Member, Employee Benefits Task Force for Educational & Institutional Insurance Administrators, Inc. (EIIA) (2007 – 2013)
- ❖ Board Member, Park Property Management, Charlotte, North Carolina (2006 to 2019).  
Treasurer and Secretary (2006-2013)
- ❖ Financial Reviewer, SACS (Southern Association of Colleges and Schools) (2006 – 2013 & 2019 to present)
- ❖ Board Member, Northwest Corridor Community Development Corporation, Charlotte, NC (2004 – 2009)

### Presentations:

- ❖ Selected Panelist, “*State University System Funding*”, Florida Senate Higher Education Committee, March 2025
- ❖ Selected Panelist, “*2025 Budget Overview*”, Florida House Higher Education Committee, February 2025
- ❖ Selected Panelist, “*The Big 12 CBO Scorecard*”. NACUBO 2024 Annual Meeting. This scorecard is the first of its kind for Chief Business Officers to measure their personal performance and their impact on our institutions.

- ❖ Keynote Speaker, 28<sup>th</sup> Annual Joseph C. Andrews Mentoring Celebration at the University of Central Florida, “*Community Excellence.*” February 2022
- ❖ Selected Panelist, “*Advancing Diversity and Inclusion on Campus: Continuing the Conversation.*” NACUBO 2018 annual meeting
- ❖ Selected Panelist, “*Enduring and Emerging Roles for the Chief Financial Officer*”, NACUBO 2018 annual meeting
- ❖ Selected Panelist, “*New Ways to Lead, Collaborate and Succeed with IT Investments,*” NACUBO (July 2017)
- ❖ Facilitator, “*Managing the University*” Administrative Management Institute, Cornell University (July 2017)
- ❖ Contributor, “*The Power of Storytelling in Driving Participation across the Institution.*” Howard Teibel’s “Navigating Change” National Podcast series,
- ❖ Facilitator, “*Navigating the New Normal*”, Board Retreats for Bennett College, Miles College, and Elizabeth City State University (Summer 2016).
- ❖ Panelist, “*CBO’s Role in Race and Diversity*” NACUBO (June 2016)
- ❖ Instructor, “*New Business Officer Program*” NACUBO (July 2016)
- ❖ Co-Facilitator, “*Access and Success: Chief Enrollment and Chief Financial Officers Bridge the Need – Merit Gap*”. AACRAO (March 2016)
- ❖ Mentor, *New Business Officers Program*” EACUBO (Eastern Association of College and University Business Officers) (February 2016)
- ❖ Presenter, “*The Power of Direct Engagement.*” NACUBO’s CBO Speaks series. (August 2015)
- ❖ Co-Presenter, “*Access and Success: Chief Enrollment and Chief Financial Officers Bridge the Need – Merit Gap*”. AGB (Association of Governing Boards) (October 2015)
- ❖ Co-presenter, “*Fulfilling Financial Responsibilities: How Board Members and CFOs Can Contribute to More Effective Governance.*” AGB (Association of Governing Boards) national webcast (October 2015)
- ❖ Presenter, “*Navigating the New Normal Financial Education Series*” HBCU Nation Radio Show (Spring and Summer 2015 & rebroadcasts started in summer of 2020)
- ❖ Presenter, “*Avoiding Financial Exigency*”. SACUBO (Southern Association of College and University Business Officers) Annual Meeting (April 2015)
- ❖ Presenter, “*The Confusion of the “Ms” in Enrollment: Money versus Mechanics.*” AGB (Association of Governing Boards) Annual Meeting, (April 2015)
- ❖ Presenter, “*Looking Under the Hood: Institutional Aid Policies and Strategies*”. NACUBO national webcast (April 2015)
- ❖ Presenter, “*The Intersection of Strategy and Reality; Where Finances, Policies, Practices and Effectiveness Meet.*” EACUBO Annual Meeting (October 2014)
- ❖ Presenter, “*Navigating the New Normal; Imperatives for MSI Effectiveness and Avoiding Financial Exigency.*” Southern Education Foundation national webinar (September 2014)
- ❖ Presenter, “*Avoiding the Financial Icebergs at Minority Serving Institutions*” Southern Education Foundation Annual Meeting in Washington, DC (June 2013)
- ❖ Presenter, “*Back to the Basics*” Southern Education Foundation Annual Meeting (June 2012)
- ❖ Facilitator, “*Accreditation is a Process Not an Event*” Board retreats for Jarvis Christian (2011) and Bennett College (2012)

### Articles, Publications and Media:

- ❖ Author, “*The New Normal Continues to Affect Institutions*” AACRAO (American Association of College Registrars and Admission Officers) (October 2016)
- ❖ Author, “*Enlightening IT*”. NACUBO’s Business Officer Magazine (March 2016)
- ❖ Collaborator, “*Benchmarking Breakthrough*.” NACUBO’s Business Officer Magazine (October 2015)
- ❖ Author, “*Navigating the New Normal*” video tutorial launched nationwide. Tutorial is accompanied by worksheets for trustees and senior administrators (February 2015)
- ❖ Co-Author, “*Past Rationale, New Thinking Are Keys to Proper Planning*”. NACUBO’s Business Officer Magazine (November 2014)
- ❖ Author, “*Navigating the New Normal; Imperatives for MSI Effectiveness and Avoiding Financial Exigency*.” –Southern Education Foundation, (August 2014)

### Awards:

- ❖ Awardee, Howard University School of Business 45<sup>th</sup> Anniversary Exemplar Alumni (October 2015)
- ❖ Awardee, Boys Scouts of America Northern Virginia Chapter Outstanding Accountant Award – 1998
- ❖ Awardee, four-year track and field scholarship, Howard University (1989 – 1993)
- ❖ Awardee, Scholar Athlete Recognition, Howard University (1990 – 1993)
- ❖ Inductee, Golden Key National Honor Society (1993)

### **Service in Personal and Community Organizations**

- ❖ Black History Month Speaker, “*The Collective Climb: Ascending the Ladder*.” Darden African American Network, February 2024
- ❖ Host, “*Its Easy Son*”, ongoing podcast series launched in June of 2020 (close to 100 episodes)
- ❖ Author, “*Its Easy Son, Quit Making Things Difficult*”, published in October of 2019
- ❖ Speaker, “*Its Easy Son*”, JACAN, 9<sup>th</sup> Annual Trailblazer Scholarship Banquet (September 2019)
- ❖ Speaker, “*If Not Now When*”, Baccalaureate Speaker Gordon Conwell Theological Seminary Commencement (May 2017)
- ❖ Speaker, “*It Is On Us Now*”, NAACP Elmira/Corning Chapter MLK Breakfast (January 2017)
- ❖ Men’s Bible Study, Calvary Baptist Church, Ithaca, NY (June 2014 – July 2020)
- ❖ Minister in Training at the Park Church (2010 – 2013)
- ❖ Instructor, High School Sunday School The Park Church (2006 – 2013)
- ❖ Coach, U-10 Girls Strikers Soccer Center (2006 – 2012)
- ❖ Task Force Appointee, Attorney General of North Carolina Campus Safety Task Force 2007 – 2008 to study the Virginia Tech campus shooting
- ❖ Co-Chairman, Board of Trustees, Florida Avenue Baptist Church (1998 – 2000)
- ❖ American Institute of Certified Public Accountants (1998 – 2006)
- ❖ Maryland Society of Accountants (1998 – 2006)

- ❖ Speaker, *“Leading from Within”*, Jamaican American Cultural Association Annual Dinner, Charlotte, North Carolina, 2007
- ❖ Co-Chairman, Accounting Advisory Board, Howard University School of Business (1996 – 1997)
- ❖ Speaker, *“Education is Key, Education is Essential”*, Rotary Club of Kingston, Kingston, Jamaica 1996
- ❖ Panelist, *“The NCAA Clearinghouse and its Impact on Student Athletes”*, Mico and Sam Sharpe Teachers College, Kingston, Jamaica 1996
- ❖ Participant, Deloitte and Touche Southeastern Challenge for Howard University (1992)