

## OVERVIEW

**General Management Executive** in public sector and nonprofit organizations. Brings 25 years of general management and advisory experience to CEOs, CFOs, and trustees through critical financial and organizational decisions. Skilled in cultivating and advancing mission-driven organizations and initiating programs and collaborations that achieve tangible results. Known as a proactive, energetic problem solver, effective manager, incisive board member, and community leader who employs vision, solid judgment, and novel approaches to achieve stakeholder and organizational goals.

### *Key Competencies*

Strategic planning | Plan Development & Execution | Team Organization & Motivation | Education & Healthcare finance

## PROFESSIONAL EXPERIENCE

**UNIVERSITY OF MASSACHUSETTS, DARTMOUTH**, Dartmouth, MA, *Interim Chief Financial Officer* 2022 - present

- Cabinet level executive position reporting to University Chancellor with responsibility for financial planning, budgeting, financial communication, reporting and controlling for University and its related organizations.
- Lead newly reorganized University department to advise senior University leaders on development of long-range financial plans, annual operating budgets, in-year financial forecasts, financial efficiencies, and compliance.
- Identify, spearhead, and collaborate on management and financial process improvements that lead to greater efficiency, improved delivery of service, and more effective advancement of the University's strategic objectives.
- Build collaborative relationships across the University to enhance operational and financial performance, including productive teams with human resources, capital planning, enrollment, advancement, academics, and student affairs.
- Spearhead University's interactions with private real estate partner on student residence hall, assuring University needs are addressed, contractual obligations are met, and navigating areas of emerging coordination and negotiation.
- Represent University with the System-wide financial and administration office, including coordination on financial forecasting, budgeting, and additional System-wide initiatives.
- Represent the University leadership on contractually established budget board with various University constituencies.
- Bring fresh approach to budget and controlling teams, establishing campus financial communication and outreach with clear focus on customer service and service delivery orientation.

**CEDAR CAPITAL CONSULTING LLC**, Boston, MA 2020 – 2022

- Launched consultancy advising nonprofit and public organizations on capital and financial planning.

**THE PFM GROUP LLC**, Boston, MA | San Francisco, CA 1992 – 2020

*SEC-registered privately held financial and investment advisory firm (~650 employees and ~\$225M revenue) serving large nonprofit and public sector organizations.*

**Head of Healthcare and Higher Education Practice** (2012 – 2020) | **Partner/Managing Director** (2009 – 2020)

- Led practice with business plan responsibility for client relationships (CEOs, CFOs, presidents, treasurers, and trustees) in higher education, healthcare, research, senior living, and student loan sectors.
- Advised clients on building financial plans to support strategic objectives, including capital markets, debt strategies, financial risk management, investor relations, mergers, and credit management.
- Initiated, executed, and integrated acquisition of competitor firm, aligning firm's goals to drive 30% increase in revenues.
- Built firm's first dedicated healthcare practice with team of 12 professionals (20 including matrixed members) and revenues of over \$5M. The practice frequently ranked second or third in market share.
- Expanded engagements with 25+ large clients, including issuance of over \$8B debt in public & private markets. Consistently retained by client executive teams, including after leadership changes.
- Fostered new treasury consulting practice by collaborating with investment advisory colleagues to offer clients a service that improved banking performance and reduced bank fees, often by 30%.

*Internal Firm Leadership:*

- Served as member of firm's Finance Committee overseeing financial planning and analysis, budgeting, capital structure, and new venture investments, under firm CFO's direction. Collaborated with partners to deploy new ERP.
- Developed coalition to build first flexible work policy and initiated employee affinity groups to enhance employee retention, mentoring, and engagement as member of PFM's inaugural Diversity, Equity & Inclusion Council.

**Managing Consultant** (1992 – 2008)

- Sourced, marketed to, managed, and developed "trusted advisor" relationship with clients.
- Led client advisory teams focusing on financing options in fixed income capital markets.

- Negotiated all aspects of financial execution and pricing with investment banks on behalf of clients.
- Analyzed and modeled financial plans and forecasts for clients, including rate forecasting and contract structure.

**CITY OF BOSTON, OFFICE OF BUDGET MANAGEMENT** (Boston, MA) **Assistant Budget & Program Evaluation Manager:** Initiated and negotiated incentive public performance metrics with heads of 12 city departments. Enhanced performance and financial accountability and transparency for several city services including procurement, cash management, and pension management.

**RATEPAYERS' ADVISORY BOARD TO THE MWRA** (Boston, MA) **Mayoral Appointee:** Achieved changes, via collaboration with 60 towns, in two MWRA budgets leading to lower wholesale water and sewer rate increases, in context of federal court order for \$5B Boston Harbor Clean-up.

**KIDDER, PEABODY & CO., INC.** (New York, NY) **Analyst, Public Finance Department:** Banking analytical support, including providing analyses for largest multi-bond refunding completed at that time.

## BOARD & COMMUNITY LEADERSHIP EXPERIENCE

**MASSACHUSETTS RIVERS ALLIANCE**, Cambridge, MA 2021 – Present  
*Nonprofit organization that improves the environmental health of Massachusetts rivers through science, advocacy, and collaboration among 25 river organizations. **Board of Trustees Member, Governance Committee** ([massriversalliance.org](http://massriversalliance.org))*

- Led adoption of revised financial policies including new banking arrangement and inaugural investment policy.

**TOWN OF BELMONT, CAPITAL COMMITTEE & WARRANT COMMITTEE**, Belmont, MA 2017 – Present/2023  
**Chair**, *Appointed by Town Moderator to Town Finance Committee. [www.belmont-ma.gov/warrant-committee](http://www.belmont-ma.gov/warrant-committee)*

- Advise town elected bodies on capital and operating budget (recent foci: restructuring capital planning process, pension programs, \$295M high school construction project, solid waste contracts, and health plan design).
- Spearheaded \$100M reduction in OPEB liability with novel analysis, research, and negotiation.

**LASELL VILLAGE LIFE PLAN COMMUNITY**, Newton, MA 2016 – Present  
*Nonprofit senior living community for ~250 residents with graduated care levels and \$20M budget.*  
**Vice Chair, Board of Trustees Member** [www.lasellvillage.com](http://www.lasellvillage.com)

- Negotiated real estate and service agreements between the Lasell Village and affiliate Lasell University.
- Restructured investment management approach and implemented OCIO model for \$50M endowment.
- Advised on funding alternatives for multi-stage \$20M construction project and energy generation project.

**CLARITY MARKET HOLDINGS LLC**, New York, NY **Board of Advisors** [www.claritybid.com](http://www.claritybid.com) 2020 – 2022

- Provide market advice and support to leadership team of a venture funded fintech firm that produces Clarity BidRate, an alternative trading system specializing in variable-rate securities and data.

**FRIENDS OF LEO. J. MARTIN SKIING**, Weston, MA 2013 – 2023  
*501c3 organization of >800 members advancing Boston area cross-country skiing.*  
**Founder and Board Chair** [www.foljms.org](http://www.foljms.org)

- Launched and incorporated nonprofit, established board of directors and advisory board, formed operations committee and instituted governance, operations, and financial procedures.
- Negotiated operating lease with State's DCR and secured State capital facilities investment of over \$2M.

**MOTHER CAROLINE ACADEMY AND EDUCATION CENTER**, Dorchester, MA 2001 – 2018  
**Finance Committee Member** (2010 – 2018); **Board of Trustees & Executive Committee Member** (2001 – 2009)

- Navigated challenging leadership transition away from founder-CEO.
- Initiated strategic review of long-term partner alternatives to help school to thrive in changing educational landscape.

## EDUCATION

**COLUMBIA BUSINESS SCHOOL**, New York, NY  
**COLUMBIA UNIVERSITY SCHOOL OF INTERNATIONAL & PUBLIC AFFAIRS**, New York, NY  
**MBA | MIA, Finance and International Economics**

- *Honors: Beta Gamma Sigma, Bronfman Fellowship (full tuition)*

**HARVARD UNIVERSITY**, Cambridge, MA  
**B.A., Social Studies** (*honors program integrating economics and political science*)

- Captain, Radcliffe Varsity Lightweight Crew, Collegiate National Champions. Tutor, Deer Island State Prison

## ADDITIONAL INFORMATION

- *Interests: Open water swimming (Buzzards Bay!), hiking, Pan-Mass Challenge, reading*