Discussion Topics

Huron is pleased to have the opportunity to visit with the OACUBO to share a selection of thoughts and perspectives on higher education financial trends and common institutional responses.

- Selected Trends in Higher Education

- Common Institutional (6 selected)
  - Budget Redesign Initiatives
  - Operational Performance Reviews
  - Enrollment Management Initiatives
  - Service Delivery Assessments
  - Academic Cost Rationalization
  - Strategic Partnerships

- Concluding Thoughts and Discussion
Trends in Higher Education
Pressures Impacting Higher Education

Higher education institutions must be aware of and be prepared to respond to an increasing set of internal and external economic pressures, as well as today’s changing marketplace and student expectations.

**Economic Pressures**
- Price sensitivity limiting tuition increases
- Limited state funding growth, at lower-than-historic levels and with increased strings
- Increased competition for students, particularly among regional public universities
- Increased constraints and competition for research and patient care revenue

**Changing Landscape**
- Shifting student demographics
- Increasing adoption of disruptive technologies; calls to “innovate or die”
- Increasing demand for college-educated workers
- Post-recession market growth has improved investment performance and fundraising

Repeated economic indicators and institutional constrains suggest that institutional financial challenges will persist.
State Appropriations

Nationwide, state support for higher education is up 3.4%, with increases in more than 75% of states (2016-17), indicating an increased willingness to support higher education; however, increases still lag pre-recession levels.

Net Tuition Revenue & State Appropriations

Despite recent state appropriations increases, the overall cost burden of higher education has continued to shift in the last 25 years, from public support to individuals.

In 1990 the public supported 64% of the cost associated with Higher Education.

By 2015 public support for higher education dropped to 46% of the total cost.

Note: Net tuition revenue used for capital debt service included in the above figures. Constant dollars adjusted by SHEEO Higher Education Cost Adjustment (HECA).

Source: State Higher Education Executive Officers, May 18, 2016
Demographic Pressures

Competition for tuition dollars has continued to increase, as the US has experienced a 7-year population decline in the traditional college going age cohort, peaking in 2000.

The nation is projected to produce fewer high school graduates in all of the 10 graduating classes between 2014 and 2023, compared to the highest recorded number of graduates in 2013. (WICHE, 2016)

Source: United State Census Bureau; Age and Sex Composition: May 2011
Western Interstate Higher Education (WICHE) report (Knocking at the College Door), December 2016
Tuition Discounting

For academic year 2015-16, the average private institution discount rate was an estimated 42.5%, extending the gap between sticker prices and what most students actually pay to its highest level ever.

While discounting trends are driven by private institutions, they reflect the increased price sensitivity and potentially declining yield rates and enrollments that are similarly driving pricing conversations at public institutions.

Source: NACUBO 2016 Tuition Discounting Study, May 2016
NIH Funding

After years of slow growth or reductions in funding, total NIH appropriations increased 7% from 2015 to 2016. Competition for funding remains high, however, with applicant success rates under 20%.

- Sequestration mandated the National Institutes of Health (“NIH”) cut $1.6 B of its federal grant budget for the 2013 fiscal year; NIH appropriations did not exceed 2012 levels until 2016
- Over the past 10 years, research applications have increased 14.2% to 54,220, while awards have only increased 2.7% to 10,372

As a result of decreasing federal funding, research departments have been forced to begin seeking alternate sources of funding, such as private industry and foundations.
Private Giving

Charitable contributions to colleges and universities increased by approximately 1.7% in 2016, with institutions bringing in $41 billion; however, when adjusting for inflation, the gain is nearly eliminated.

- Philanthropic support represented 10%-12% of university expenditures in recent years, down from the 2000 peak where charitable support represented almost 16% of expenditures
- The percentage of philanthropic support directed to operations (vs. capital) has continued to trend up since 2000, currently reflecting 61% of all support

**Philanthropic Support for Education as a Percent of Expenditures**

Source: Voluntary Support of Education (VSE) survey, Council for Aid to Education, February 2017
Persistent economic pressures and a changing marketplace continue to put pressure on higher education institutions, forcing university leaders to think differently.

- **Aggregate revenue growth** will remain above 3% for both public and private universities.
  - Modest net tuition revenue growth, incremental increases in state appropriations, stable research funding and favorable academic medical center performance support stable revenue growth projections.

- **Clouds are beginning to form on the horizon.** Rising pension liabilities, increasing labor costs and uncertainty around future federal policies and funding could weigh on the sector.

- **Changing business conditions** will affect elements of the diverse sector differently.
  - Universities, both public and private, with the strongest brands and value propositions for students will continue to outperform.
  - Smaller, more regionally oriented public and private universities will face the greatest challenges.

While market pressures are significant, Moody’s 2017 Higher Education Outlook was described as “Stable with Clouds Forming on Horizon” – an ominous forecast, yet rosier than the “negative” outlook provided in numerous recent years.
Selected Institutional Responses
Changing Nature of Financial Management

Industry challenges are forcing leaders to proactively engage with the financial realities facing their institution.

### Traditional Financial Management

- Financial challenges solved through cost reduction initiatives and **tuition increases**
- Financial management as the purview of vice chancellors of **administration and finance**
- Operations **managed through budget**, without focus on actual results or cash flows
- Portfolio of **academic activities** set irrespective of financial impacts or realities
- Belief that **revenue diversification** provided financial security
- Credit ratings were stable and **debt portfolios** were only reviewed when specific needs arose

### Strategic Financial Management

- Tighter connection between **strategic plan** and resource allocations
- Increased involvement of **President and Provost** in financial decision making
- Better understanding of the interplay between budgets, revenues and **cash flows**
- Understand opportunities for financial **differentiation** to fund strategic priorities
- Acknowledgment and understanding of **risk tolerance**
- **External factors** are identified, monitored, and mitigated

The increased complexity of university financial management dictates that institutional leaders need to develop clear and insightful analyses to produce institutional narratives that inform strategic decisions.
Selected Budget Redesigns

Common budget redesign rationales:
- Change nature of decision making
- Move to a more methodical approach
- Grow revenues
- Promote incentives
- Increase transparency
Overview of Budgeting Alternatives

Inside Higher Ed’s 2016 survey of college business officers found that ~45% of institutions have significantly changed their approach to resource allocation in the past four years.

<table>
<thead>
<tr>
<th>Common Budgeting Models¹</th>
<th>Incremental Budgeting</th>
<th>Formula Funding</th>
<th>Performance Funding</th>
<th>Incentive-Based Models</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Centrally driven</td>
<td>• Unit-based model focused on providing equitable funding</td>
<td>• Unit-based model focused on rewarding mission delivery</td>
<td>• Focus on academic units</td>
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<tr>
<td></td>
<td>• Current budget acts as “base”</td>
<td>• Unit rates are input-based and commonly agreed upon</td>
<td>• Unit rates are output based and commonly agree upon</td>
<td>• Incorporates a devolution of revenue ownership to local units, as generated</td>
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<td></td>
<td>• Each year’s budget increments (decrements) adjust the base</td>
<td>• Annual fluctuations are driven primarily by the quantity of production and not from changes to rates</td>
<td>• Annual fluctuations are driven primarily by changing production and not from changes to rates</td>
<td>• Allocates costs to revenue generating units</td>
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<tr>
<td></td>
<td>• Focus is typically placed on expenses</td>
<td>• Common modifications:</td>
<td>• Common modifications:</td>
<td>• Utilizes a centrally managed “subvention pool” to address strategic priorities</td>
</tr>
<tr>
<td></td>
<td>• Common modifications:</td>
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<td>• Common modifications:</td>
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<tr>
<td></td>
<td></td>
<td>• Block-grant models bucket line-items together to promote local control</td>
<td>• Weighting schemes to control for local cost structures</td>
<td>• Revenue allocation rules</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Revenue incentives may be incorporated for the allocation of resources above-and-beyond the base</td>
<td>• Used only for select activities (e.g., instruction)</td>
<td>• Number of cost pools</td>
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<tr>
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<td></td>
<td>• Approximately 60% of institutions and 79% of public doctoral institutions report using this model</td>
<td>• Approximately 26% of institutions and 45% of public doctoral institutions utilize a formula funding model</td>
<td>• Participation fee (tax rate)</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Approximately 26% of institutions and 45% of public doctoral institutions utilize a formula funding model</td>
<td>• Approximately 20% of institutions and 26% of public doctoral institutions utilize a performance funding model</td>
<td>• Approximately 14% of all institutions and 21% of public doctoral institutions use an incentive-based model</td>
</tr>
</tbody>
</table>

While incremental models remain the most common, the majority of institutions adopting new budget models are opting for modified decentralized models of “highly centralized, decentralized models”.

¹ Adoption rates from the 2011 Inside Higher Education Survey of College and University Business Officers; Percentages do not add to 100% due to hybrid budgeting models.
Budget Redesign Motivating Factors

General Benefits

- Translates strategic goals into management and operating plans
- Lets strategy, not history, drive resource allocation
- Facilitates two-way discussions between entities, a joint understanding of markets, and annual discussions about institutional priorities
- Optimizes incentives with the potential to create win-win opportunities across an entire institution

Benefits of Incentive-based Models

- Aligns budgetary authority with responsibility and accountability
- Focuses necessary and proper attention on revenues and revenue development
- Fosters entrepreneurship and rewards departmental efforts
- Encourages efficient and competent administrative services
- Identifies the true nature of internal subsidies (transfer payments)
Recent HE Administrative Assessments

The negative effects of the struggling economy have considerably increased the frequency with which universities are undertaking comprehensive administrative operational assessments.
**Nature of Performance Improvement in HE**

Within the prescribed approach, it is increasingly common for institutions to build upon traditional immediate and incremental opportunities through the exploration of more aggressive transformational opportunities.

<table>
<thead>
<tr>
<th>Immediate</th>
<th>Incremental</th>
<th>Transformational</th>
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</thead>
<tbody>
<tr>
<td>- Across the board budget cuts</td>
<td>- Tuition and fee rationalization</td>
<td>- Academic program prioritization</td>
</tr>
<tr>
<td>- Salary, hiring and travel limitations</td>
<td>- Reviews of individual functional areas or cost categories</td>
<td>- Organizational rationalization</td>
</tr>
<tr>
<td>- Postponement of deferred maintenance</td>
<td>- Procurement strategies</td>
<td>- Amended service delivery (shared, managed, outsourced)</td>
</tr>
<tr>
<td>- Capital project delays and cancellations</td>
<td>- Auxiliaries optimizations/outsourcing</td>
<td>- Sales and divestitures</td>
</tr>
<tr>
<td>- Service reductions</td>
<td>- Process standardization</td>
<td>- Institutional mergers/acquisitions</td>
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<td></td>
<td>- Working capital management</td>
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Transformational approaches, while more difficult to implement, have the potential to ensure sustainable operations and secure long-term gains in efficiency and performance.
Student Lifecycle Management

Institutions are increasingly shifting enrollment operations to focus on Student Lifecycle Management — the student’s entire journey — from recruiting through the entire educational experience.

The Holistic Approach

- Holistic and data-driven approach that measures and improves student success
- Model positions the student journey as a continuous cycle—with critical points of engagement throughout—beginning when students are first recruited and post graduation when alumni
- Crucial to consistently engage students at every stage as their needs evolve, strengthening that individual stage and enhancing the overall lifecycle.

These holistic approaches to student lifecycle management have been strengthened considerably in recent years as more institutions leverage data-mining for student success and CRM tools for relationship management.
Increasingly institutions are using data to create early warning systems to identify students at risk, though many institutions are still struggling with how to collect, store and share data that can be used in a meaningful way to support student success.

As institutions shift focus from recruitment to retention, many institutions are wrestling with how to shift financial aid away from merit aid towards need-based aid, as one of the biggest drivers to retention is addressing the amount of unmet need for low and middle-socioeconomic students.

Increasingly, colleges and universities have become more reliant on full-pay (or near full-pay) international students who have help to counter uncertainty regarding state appropriations, declines in domestic enrollments, and increasing price sensitivity.

– International students contributed $35.8 billion to the U.S. economy in 2015 (1)

Institutions are facing challenges due to aging technology infrastructures, and finding ways to enhance student / alumni engagement has resulted in an the increased adoption of CRM technology and enhanced Student Information Systems (SIS) to meet these changing needs.
Move to Shared Service Delivery

As service delivery initiatives have become commonplace, there is an increasing set of institutions with mature models that can be leveraged as case studies for lesson learned and design features.
Benefits of Shared Services

MORE SERVICE to support faculty, research, and teaching with...
LESS investment for additional human capital resources

MORE INVESTMENT in research, student aid, and infrastructure with...
LESS dependency on state appropriations and tuition

MORE ability to make better, more informed, and swifter decisions with...
LESS focus on keeping up with innovation and the pace of business

Invest smarter. Work more efficiently. Provide decision support.
Shared Services Lessons Learned

Perhaps the most notable lesson from recent higher education shared services initiatives is that cookie cutter efforts, mirrored on decades of corporate initiatives are unlikely to work in higher education settings.

- **Hasty Commitment to Shared Services** – Shared services is only one of a number of models that may improve operational challenges at a university.

- **Lack of Stakeholder Involvement** – Change in an organization’s structure and operations require broad stakeholder involvement throughout process.

- **Underestimating the Human Element** – Identifying processes and deploying technology to move to a shared service model is only the start of the effort; engaging employees and effectively managing transitions are necessary for success.

- **Elusive ‘Silver Bullet’** – Shared services have been developed at many institutions; while there are common elements to successful efforts, each implementation is uniquely tailored to the culture, goals and resources of the institution.

- **Information Gap** – A lack of clear, concise and complete communication to the campus leads to fear and, often, unnecessary anxiety by stakeholders.

- **Unrealistic Savings Targets** – Often initiated with the prime focus on achieving cost-savings, implementation efforts often reduce expected savings after the realities of the changes set in.
Selected Academic Program Reviews

Recent academic program reviews have taken the form of program prioritization efforts (e.g. Dickenson) or cost of education studies, the majority of which resulted in limited efficiencies and lasting change.

Other Notable Cost of Education Initiatives Include:

- Delaware Study (national study sponsored by faculty)
- States of Illinois, Minnesota, Texas, and Virginia
- State Higher Education Executive Officers (SHEEO) study focused on Florida, Illinois, New York and Ohio
## Managing Portfolio Costs

The most effective way to navigate stakeholder pushback is to leverage institutional data, as there is a seemingly unending set of analyses that can be conducted and levers that can be pulled, to adjust the academic portfolio.

<table>
<thead>
<tr>
<th><strong>Program Economics</strong></th>
<th><strong>Academic Policies</strong></th>
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<tbody>
<tr>
<td>- Program demand (applicants, yield, persistence)</td>
<td></td>
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<tr>
<td>- Class size (low, average, high, distribution)</td>
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<tr>
<td>- Capacity trends, # of sections, section fill rate</td>
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<tr>
<td>- Redundant course offerings</td>
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<tr>
<td>- Students per faculty</td>
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<tr>
<td>- Mix of graduate to undergraduate; PhD students</td>
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<tr>
<td>- Cost per credit hour, student, degree (trends)</td>
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<tr>
<td>- Resident vs. Non-resident enrollment</td>
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<tr>
<td>- Teaching loads (Hours, FTE, CRHR)</td>
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<tr>
<td>- Faculty effort (Inst., advising, research, service)</td>
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<tr>
<td>- Release, stipends, overloads (frequency, caps)</td>
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<tr>
<td>- Faculty office spaces</td>
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<td>- Student declaration policies for majors</td>
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<td>- Double-major policies</td>
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<td>- Drop/Add policies</td>
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<table>
<thead>
<tr>
<th><strong>Program Structure</strong></th>
<th><strong>Other Considerations</strong></th>
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<tbody>
<tr>
<td>- Faculty size; ratio of full-to-part-time faculty</td>
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<tr>
<td>- Program flexibility &amp; course mix (general, core, elective)</td>
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<tr>
<td>- Course and pre-requisite frequencies</td>
<td></td>
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<tr>
<td>- Core imbalances &amp; vertical integration (bottlenecks)</td>
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<tr>
<td>- Use of summer terms, intersessions, etc.</td>
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<tr>
<td>- Program/Course synergies</td>
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<tr>
<td>- Percent interdisciplinary (import/export)</td>
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<tr>
<td>- Teaching assistants usage</td>
<td></td>
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<tr>
<td>- Administrative roles for faculty</td>
<td></td>
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<tr>
<td>- Level of administrative support for faculty</td>
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<tr>
<td>- Academic Space (scheduling software)</td>
<td></td>
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<tr>
<td>- Financial aid, graduate waivers, stipends</td>
<td></td>
</tr>
<tr>
<td>- Discipline mix</td>
<td></td>
</tr>
<tr>
<td>- Research throughput (dollar density)</td>
<td></td>
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<tr>
<td>- Use of RAs vs Post-docs</td>
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</table>
The “Academic Portfolio”

Huron recommends that institutions think of their academic programs as a portfolio, in which academic leaders recognize the need to maximize resources, market relevance and mission-driven activities.

- The array of academic programs an institution offers, when strategically designed, powerfully supports its competitive advantage in the marketplace, leading to distinctiveness and long-term financial sustainability.
- The illustrative portfolio below raises questions about the institution’s financial sustainability, as the institution’s primary low-cost areas are in decline, while the majority of high-cost areas are experiencing growth.

Illustrative University-wide Academic Portfolio

Huron recommends that institutions think of their academic programs as a portfolio, in which academic leaders recognize the need to maximize resources, market relevance and mission-driven activities.
Pursuit of Strategic Partnerships

Faced with the need to innovate, institutions have increasingly increased their appetite for strategic partnerships, extending the partnership spectrum from outsourcing and consortiums to include mission-aligned third-party partners and whole-sale institutional mergers.

<table>
<thead>
<tr>
<th>Description</th>
<th>Outsourced Auxiliaries</th>
<th>Study Abroad, Procurement, Economies of Scale</th>
<th>Third Party Academic, Recruitment, etc. Services</th>
<th>Back Office and Administrative Function Mergers</th>
<th>Institutional Mergers and Partnerships</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use third party to fully operate or manage auxiliary operations (dining, bookstore, housing, campus safety, etc.)</td>
<td>Partner with firm(s) or other institutions(s) to operate study abroad, procurement, and other scalable activities</td>
<td>Hire third party to provide administrative, curricular, or student services, like recruitment or online course development</td>
<td>Merge administrative functions with local institution(s) to reduce costs for all parties involved; implement shared service model</td>
<td>Consolidate operations with, or be absorbed by, another institution; satellite campus model or complete merger</td>
<td></td>
</tr>
</tbody>
</table>
| Benefits                                 | • Usually more profitable  
• Less management complexity | • Lower costs through economies of scale  
• Greater offerings | • Reduced personnel costs  
• Greater offerings | • Reduced admin. costs  
• Economies of scale | • Ensures campus operations do not cease |
| Challenges                               | • Less operational control  
• Potential revenue loss | • Less flexibility to customize offerings, purchases, etc. | • More challenging to tie class or courses to institutional identity | • Complex to manage  
• Lack of “personal” or tailored service | • Potential loss of identity, including name  
• Headcount reductions |
Concluding Thoughts
Lessons Learned

As with any sensitive change management effort, it is critical that institutional change efforts are transparent, are data-informed, and that they utilize high levels of stakeholder engagement.

- Understand the University’s appetite for change and ability to effectuate change management
- Clearly articulate campus and leadership initiative objectives and desired end-goals at the start
- Engage faculty, process owners, and key campus stakeholders in solution development
- Utilize data and objective measures to depersonalize and depoliticize change
- Prioritize opportunities for implementation based on objective goals and realistic fortitude for change
- Ensure planning process realistically considers required timeframe and assesses potential risks and mitigation measures
- Establish methods to continually measure savings achieved and track progress following implementation
- Systematically update campus stakeholders on progress achieved to ensure continued commitment

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Concluding Thoughts

Few institutions have strategically addressed the entirety of their Academic Portfolio; therefore, while academics are the core of each institution’s operations, successful initiatives almost always result in opportunity identification.

**Successful change initiatives should:**

- **Fulfill Strategic Priorities:**
  Leverage data to motivate faculty and staff to embrace change

- **Ensure Financial Stability:**
  Balance revenue generating programs against mission critical functions

- **Strengthen Institutional Differentiation:**
  Build on institutional strengths to create demand and enhance reputation

- **Align Outcomes with Needs:**
  Increase stakeholder satisfaction and success that will demonstrate a strong ROI
Questions and Discussion
Huron’s Higher Education Practice

Huron, and Huron’s higher education practice, was founded in 2003, though our core team members have been active in higher education consulting for over 25 years.

**Huron by the numbers:**
- Huron has more than 350 dedicated higher education consultants
- Huron has worked with over 285 colleges, universities, and academic medical centers
  - Includes 97 of the top 100 research universities

**Huron’s distinctive attributes:**
- Our approach focuses on continuous improvement in higher education
- We work with our clients to understand unique aspects of their culture and operating environment
- We emphasize collegial working relationships and building partnerships with senior management, faculty, and other key stakeholders
- Our approach leverages data and relevant benchmarking as critical elements of consensus building
Andrew L. Laws
Managing Director

Phone: 312-880-3201 | E-mail: alaws@huronconsultinggroup.com

Andrew helps colleges and universities maximize, allocate and leverage financial resources. Andrew’s optimization projects include revenue enhancement and cost reduction initiatives; financial modeling and budget planning initiatives; and organizational assessment and business process redesign initiatives. Andrew has led optimization projects at over 40 institutions and his recent clients include the University of Colorado, University of North Dakota, St. Thomas University, the University of Louisville and the University of Virginia.

Professional Experience

Prior to joining Huron, Andrew spent four years in investment banking, focused on financial modeling, ratio analysis and revenue and cost forecasting.

Signature Engagements

- Directed a budget redesign initiative to help a $450 MM institution move from a modified incremental budget to an incentive-based budget model. The model’s goal is to incentivize revenue growth, decentralize decision-making, and enhance institutional service levels. The engagement began in January 2011 and the University is scheduled to go-live with the model implementation for the 2013 fiscal year.

- Led an evaluation of the resource management, planning, and allocation process for a leading university with a $2.7 billion budget. Documented and analyzed the processes, policies, and incentives used by the institution and its peers, and designed a two-year implementation plan.

- Managed a resource optimization project at a top 30 private liberal arts university. The project targeted 20 non-academic departments including auxiliaries, financial operations, and student services. The engagement resulted in nearly 75 revenue enhancement and cost reduction recommendations.

Education

- Doctor of Education, Vanderbilt University
- Master of Business Administration, University of Chicago
- Bachelor in Business Administration, University of Mississippi

Publications

- The Buck Stops Elsewhere, The Business Officer, NACUBO, January 2013

Professional Associations

- Speaking engagements include, AAU Provost Council (2016), CACUBO Annual Meeting (2014); NACUBO Budget Forum (2014, 2013); SACUBO Annual Meeting (2014); NACUBO Higher Education Accounting Forum (2014); EACUBO Annual Meeting (2011)
- Faculty Member, Higher Education Finance, Vanderbilt University, Peabody Professional Institute, 2012-2014
- Chairman, Private College Research Incentives Subgroup, Mississippi Secretary of State Business Incentives Study Group, 2012
- Board of Directors, The University of Mississippi Alumni Association, 2005-2008
Jason Moebius
Managing Director
Phone: C 773 368 0967 | E-mail: jmoebius@huronconsultinggroup.com

Jason is a senior leader in Huron’s Health and Education practice with 15 years of experience assisting hospitals and universities improve their performance and implement business critical applications as part of large scale change initiatives. Jason specializes in assisting institutions with enterprise transformation initiatives that improve performance by focusing on people, process, and technology.

Professional Experience
Jason has led over 30 process improvement and technology implementation projects in the areas of Finance, HR/Payroll, Research, Business Intelligence and Budgeting, leveraging all leading enterprise technologies, including Oracle Cloud, Workday and PeopleSoft.

Signature Engagements
- Supporting the deployment of Oracle Cloud Financials and Projects at Allegheny Health Network.
- Providing Oversight for enterprise technology program at Cincinnati Children’s Hospital focused on improving business process efficiency as part of upgrade to existing PeopleSoft FSCM, HCM, EPM, and ELM applications to version 9.2, as well as the implementation several new Click research administration applications.
- Assisted the University of Wyoming with a comprehensive Cloud Planning Program, which included process analysis, requirements gathering, software selection, business case development and implementation planning.
- Providing program oversight for the upgrade of PeopleSoft HCM to version 9.2 at the University of Oklahoma Health Sciences Center.
- Providing executive oversight for implementation of PeopleSoft Grants Suite and upgrade of PeopleSoft Financials to version 9.2 at the University of California – Berkeley.
- Recently served as the program advisor for an implementation of PeopleSoft Financials at City of Hope National Medical Center. Providing coordination with multiple consulting firms assisting with the implementation.
- Served as quality assurance director for Financials integration team involved in the implementation of PeopleSoft HCM for the University of Wisconsin
- Directed the implementation of five PeopleSoft Financials modules (version 9.0) for the University of Oklahoma Health Sciences Center.
- Managed complex implementation of multiple PeopleSoft Financials modules (version 8.9) for the University of Wisconsin.

Education
- Bachelor of Science, Management Information Systems and Organizational Behavior majors, Miami University, Oxford, Ohio

Speaking Engagements
- Frequent presenter at HIUG and HEUG conferences
- Host for multiple Huron Consulting Group Webinars on technology and project management

Professional Associations
- Member, Project Management Institute (PMI)
- Member, Educause
- Member, HIMSS
THANK YOU