

Curriculum Vitae

F. John Case, Ed.D.

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Education

Doctorate of Education, Higher Education Management
University of Pennsylvania, Philadelphia, PA

Master of Business Administration,
St. John Fisher College, Rochester, NY

Bachelor of Science in Accounting; Computer Science minor,
State University of New York (SUNY) Geneseo, Geneseo, NY

Employment History

Morehouse School of Medicine – Atlanta, GA
October 2013 – Present

Senior Vice President for Operations and Chief Financial Officer

Oversee all financial and operational functions of the organization. Responsible for the daily activities of finance, budget, sponsored research administration, facilities, human resources, information technology, public safety, auxiliary enterprises, hospital operations and affiliations, and all other administrative activities throughout the organization. Responsibilities include organizing and executing the strategic direction, operational changes, and increased efficiencies in all operational areas of Morehouse School of Medicine.

Significant accomplishments/responsibilities:

- Implemented increased efficiencies and tools for improving all financial controls, analysis, and reports over a 2-year period
- Created an Operational Excellence Program to help improve all operation, finance, and mission areas of the organization
- Reviewed and implemented activities related to optimizing the financial, HR, and student services technology of the organization (Banner/Ellucian)
- Reorganized the finance organization within the first 6 months and created a new effective organization to move MSM forward with daily processing and reporting
- Reviewed facilities and implemented funding and plans to renovate various parts of the physical structure of the campus
- Restructured the \$8.0M Line of Credit with the institutional bank and committed to the

- full debt over the time period negotiated
- Oversee all operational and financial aspects of Morehouse Health Care (MHC - the Morehouse School of Medicine Faculty Practice Plan)
- Worked effectively to create the leadership to increase financial responsibility and all operational aspects of the MHC
- Implemented Shared Services models throughout the organization

PricewaterhouseCoopers, LLP – Raleigh, NC
October 2011 – October 2013

Practice Leader and Strategist, Higher Education/Academic Medical Center Practice

Focused on contributing to the vision and strategic growth of the Higher Education and Academic Medical Center (AMC) Practice at the Firm. Responsibilities included developing a practice relating to finance, operations, shared services, research administration, and organizational strategy in universities, colleges, medical schools, hospitals, and other non-profit organizations. Concentrated on developing new business models, organizational vision, strategy and goals, and change management with leadership. This included implementing shared service models for all types of operations, effectiveness and efficiency planning, and cost cutting strategies. Responsible for marketing the practice, executing business development strategies, building long-term relationships, selling new and additional work for the Firm, and executing on projects for success.

Significant accomplishments/responsibilities:

- Utilized past 25 years of relationships for quick client business development activities. Executed projects with previous clients from FJ Case Consulting, LLC.
- Business included four major (Top 100) universities and medical schools.
- Executed on over \$4.0M in engagements in 2012
- Developed and executed new shared service models for Universities and Medical Schools in Finance, Procurement, Human Resource, Research Administration, Billing, Information Technology, and other functions
- Developed new change management methodology for implementing shared service models in medical schools
- Developed and executed vision and strategy in the Higher Education environment
- Reviewed, analyzed, and recommended funds flow models in Academic Medical Centers and Hospitals
- Frequent speaker and panelist for new business models/strategy for back-office operations (e.g., finance, HR, procurement), and research administration models at higher education conferences
- Coached and mentored leaders and managers in shared service implementations on three specific academic medical center projects
- Responsible for all aspects of contracting, project management, delivery, quality, invoicing, and collections for current clients and projects
- Worked with senior leadership (CEOs, Dean's, Chairman, and Administrators) on academic campuses

FJ Case Consulting, LLC – Chapel Hill, NC
November 2009 – October 2011

Based on my 25 years of experience in higher education, non-profits, and for-profit organizations, created a consulting service to: 1) help educational and non-profit organizations achieve their vision through effective leadership and analytical reviews of specific functions; 2) work with new and entrepreneurial organizations to achieve their vision and goals; and 3) help young adults and

professionals achieve their personal best through motivational speaking and coaching. The educational service was geared towards organizations poised to implement new visions, organizational change, and strategic plans that will benefit from my immediate and long-term focus, as changing markets and business models require flexibility and adaptive behavior. Some services include: Interim Management and Staffing (professional and interim leadership for periodic peaks in workload); Organizational Structure (analysis of current staff, resources, and structure and planning for optimization); Strategic Planning and Performance (financial and operational reviews concentrating on creating efficiencies, cost savings, effective organizations, and improved unit performance); and, Leadership and Management Team Building (coaching and developing the leaders of tomorrow in any organization). Clients included the Research Foundation of the State University of New York (SUNY), Emory University, Cornell University, Grady Health System, Novicast, Funding Dynamics, LLC, EcoSource Distributors, and professional coaching with individuals at various organizations.

The University of Akron – Akron, OH
December 2005 – March 2010

Vice President for Finance and Administration/CFO

Reporting to the President, responsible for all fiscal and administrative operations and the Finance and Administration Division consisting of 400+ employees. Fiscal responsibilities include financial planning and budgeting, treasury services, general accounting, grant accounting, purchasing, risk management, payables, and student financial services. Administrative responsibilities include human resources, labor relations, internal audit, telecommunications, parking, dining, and other auxiliary services. Work with the President, senior cabinet members, and the Board of Trustees on strategic planning, facilities planning, operational issues, and overall management of the institution.

Significant accomplishments/responsibilities:

- Direct annual operating budget of about \$450M and annual capital spending budget, including deferred maintenance and new/renovated buildings, of about \$75M
- Restructured the Division and recruited leadership for the Finance and Administration team
- Developed new financial reporting model for the Board of Trustees, senior management, and the campus community, using dashboard reporting and financial indicators
- Developed The ACE Connection (Accountability, Customer Service, and Excellence), a program to improve employee morale and promote high quality customer service
- Successfully completed a bond issue, which included the refinancing of over \$300M for numerous capital projects
- Implemented operational excellence improvements, including revamping travel, purchasing, and business expenditures policies and procedures
- Chaired cross-functional university groups to establish collaboration and support in areas including tuition and fee structure, group insurance and benefits, smoking on campus, wellness, innovation and revenue generation, and traffic and parking
- Serve as Treasurer for the University Development Foundation
- Provide critical oversight of the financial operations of The University of Akron Research Foundation, which has an estimated annual operating budget of \$8.5M (FY 2010)

The Cleveland Clinic – Cleveland, OH
March 2003 – November 2005

Chief Financial Officer - Academic Affairs, Division of Finance

Reporting to the Clinic's Chief Financial Officer (CFO) and Chief Academic Officer (CAO), led the fiscal and administrative operations of the Clinic's education, research, and medical school enterprise. Responsibilities included three academic divisions and numerous institutes, centers and departments.

Responsible for academic affairs, strategic financial planning, budgeting, accounting, administration, and audit activities. Also served as a financial resource/internal consultant to the CFO, CAO, Division Chairmen, senior management, and other team members on all financial and operational activities.

Significant accomplishments/responsibilities:

- Planned, funded, and implemented financial and administrative unit for oversight of all Academic Affairs activities
- Planned, directed, and controlled the annual budgeting process for the Office of Academic Affairs with a total budget of about \$275M
- Collaborated with Case Western Reserve University (CWRU) to establish financial and administrative infrastructure for the newly created Cleveland Clinic Lerner College of Medicine. This critical initiative involved innovative strategic planning for the Clinic and CWRU to determine the most effective financial model, administrative structure, and academic programs in preparation for its 2004 opening
- Directed the financial and accounting system controls and standards to ensure timely financial and statistical reports for management decision making
- Implemented new financial reporting systems, using Lawson Enterprise Financial Management and spreadsheet tools
- Implemented Lawson grants package for sponsored research
- Managed all financial and administrative activities for federal, corporate, foundation, and internal sponsored research, including both basic and clinical research from pre-award processing through post-award closure (annual budget of about \$175M)
- Managed collaborative efforts for capital, endowment, and other long-term investments while developing academic affairs investment strategies and policies
- Implemented new clinical trials office for all clinical research

University of North Carolina at Chapel Hill – Chapel Hill, NC
April 2000 – March 2003

Associate Vice Chancellor for Research

Office of the Vice Chancellor for Research and Graduate Studies
January 2002 – March 2003

Reporting to the Vice Chancellor for Research and Graduate Studies, led fiscal, administrative, and compliance activities in support of the University's research enterprise, which totaled \$500 million. Responsible for consolidation and relocation of the Office of Sponsored Research (OSR) and the development of the Office of Clinical Trials (OCT) within the Vice Chancellor's office, to streamline operations supporting UNC's research enterprise.

Significant accomplishments/responsibilities:

- Implemented strategic plan for sponsored research and clinical trial administration
- Worked with the university, medical school, and hospital to implement an efficient administrative office for the submission, acceptance, and closure of all research projects
- Developed short and long-term plans to meet the university's research, financial, and administrative goals
- Redesigned the research office physically with relocation from four locations across the university to one comprehensive office
- Developed a process for effectively calculating the indirect cost proposal and fringe benefit rates and negotiated these rates with the federal government
- Created customer service program to more effectively serve academic and medical units

Executive Director - Office of Contracts and Grants

Office of the Vice President for Finance and Administration

April 2000 – December 2001

Reporting to the Associate Vice Chancellor for Finance, directed fiscal and administrative activities for the research enterprise (\$500 million in FY 2002), including proposal review and negotiation, award/account establishment, invoicing, financial review/reporting, and effort reporting. Fiscal responsibilities included preparation and negotiation of institutional facilities and administrative rate agreement, cost accounting compliance, research system implementations, recharge center management, and asset management.

Significant accomplishments/responsibilities:

- Directed a project (Research Administration Open Forums) using open forums to evaluate operational effectiveness and create a roadmap for streamlining activities and improving quality of service to the University
- Developed and updated policies and procedures for fiscal management of grant and contract funds
- Implemented new process to review and close out research projects in a timely manner
- Implemented revised letter of credit process to effectively collect receivables and cash draws from the federal government
- Reduced timeline for award setup and closeout for all sponsored research programs
- Actively participated on numerous university committees, including the Executive Research Compliance Committee and the Board of Directors for the University Child Care Center
- Selected as a participant of the University Management Development Program (Spring 2001), a program for select university administrators and faculty to further develop professional competencies

Desert Research Institute (DRI), University and Community College System of Nevada (UCCSN) – Reno, NV

September 1995 – March 2000

Interim Vice President for Finance & Administration

January 2000 – March 2000

Assistant Vice President and Controller

September 1995 – December 1999

Directed the fiscal operations of the Institute (with an annual operating budget of \$25M and annual grants budget of \$20M); including grant and contract administration, accounts payable/receivable, cash management, purchasing, and fixed asset management. Responsibilities included the budgetary review and analysis of state, grant and contract, endowment, plant, and all other institutional funds. Also responsible for the Institute's administrative computing, including oversight of administrative systems development, management information systems (data warehousing), electronic research administration, and daily administrative computing.

Significant accomplishments/responsibilities

- Prepared internal and external financial statements and reports
- Administered all accounting functions of the Institute, with an annual budget \$25M
- Chaired and served on numerous committees in the areas of administrative process redesign, finance, and information technology. Participated and led UCCSN committees in

- the areas of finance and budgeting, information technology, and CQI
- Assisted the Vice President for Finance and Administration in numerous areas including human resources, facilities, development, legislative affairs, health and safety, and information technology
- Prepared the facilities and administrative (F&A) cost proposal and negotiated the F&A and staff benefit rates with the Department of Health and Human Services

University of Rochester – Rochester, NY
 July 1986 – September 1995

Research Program Manager - Department of Medicine, School of Medicine and Dentistry
 October 1993 – September 1995

Director, Grant & Contract Accounting, Finance Department
 February 1988 – September 1993

Financial Analyst/University Cost Accountant, Finance Department
 July 1986 – January 1988

Honors and Awards

- National Council of University Research Administrators (NCURA), Distinguished Service Award, November 2008
- Nominated, Crain’s Cleveland Business CFO of the Year, September 2008
- Member, National Science Foundation Business and Operations Advisory Committee, 2001-2003
- Appointment to a three-year faculty position for NCURA's “Sponsored Project Administration – Level II” workshops, 2003-2005
- President - National Council of University Research Administrators, 2002
- Vice President - National Council of University Research Administrators, 2001
- University Representative, Board of Directors, University Child Care Center, University of North Carolina at Chapel Hill, 2000-2002
- Treasurer - National Council of University Research Administrators, 1999-2000
- Appointment to a three-year faculty position for NCURA's “Fundamentals of Sponsored Project Administration” workshops, 1998-2000
- Appointed Vice-Chair, Leadership Reno-Sparks Alumni Association, 2000
- Secretary/Treasurer, Leadership Reno-Sparks Alumni Association, 1999
- UCCSN Board of Regents Outstanding Administrator Award, 1998

Professional Societies

Member of Leadership Atlanta, Class of 2016, Atlanta, GA
Member, Association of American Medical Colleges (AAMC) Group on Business Affairs (GBA) Steering Committee, 2016-2018
Member, AAMC GBA Emerging Issues Committee, 2015-2017
Board Member, Finance and Investments Committee, Sigma XI, The Scientific Research Society. 2015-2018
Member AAMC GBA Professional Development Committee, 2014-2015
Member – Executive Doctorate Alumni Advisory Board, University of Pennsylvania, 2011-Present
Member – Converting Hearts Ministries Development Board, Creedmoor, NC, 2011-2013
Chair, Eastern Association of College and University Business Officers (EACUBO) Program Committee, 2009-2010
Board of Directors – Downtown Akron Partnership, 2008-2010
Member – Akron Public Schools Business Advisory Committee, 2007-2010
Member – Board of Directors, Better Business Bureau, Summit County, 2007-2010
Treasurer – The University of Akron Foundation, 2005-2010
Treasurer - DRI Research Foundation, 1995-2000; Desert Research Parks Inc., 1995-2000
Chaired or co-chaired University System of Nevada committees, 1997-2000, including the following:
presidential search, administrative process redesign, campus tax strategy, computing strategic plan development, administrative technology steering, controllers, and CQI committees
Member, Advisory Board, Leadership Reno-Sparks Alumni Association, 1998-2000
Member of the National Association of College and University Business Officers; National Council of University Research Administrators, Council on Governmental Relations (various years)
Participate in various committees, concurrent sessions, and workshops for NCURA activities at the national and regional level
Member of the Leadership Reno-Sparks, Class of 1997

Publications

Case, F. John, Ed.D. (2016), *Managing Managers* In Anthony J. Veriera & Rob Kramer (eds.), *Management and Leadership Skills for Medical Faculty: A Practical Handbook* (1st Ed.), (pp. 105-114), New York, NY, Springer.

Case, F. John, Ed.D. and Zwischenberger, Joseph B., MD, 2015, *Control-Center Services*, *National Association of College and University Business Officers (NACUBO) Business Officer*, Vol. 49, No.5, 24-30.

Micrograph Series, *Facilities and Administrative Costs in Higher Education*, National Council of University Research Administrators; Published in April 2000, Revised June 2015

Contributing Author – PricewaterhouseCoopers, LLC Publication: *Perspectives in Higher Education, Shared Service Centers in Universities and Academic Medical Centers*, Publication – June, 2013

Contributing Author – PricewaterhouseCoopers, LLC Publication: *Perspectives in Higher Education, New Delivery and Business Models in Higher Education*, Publication – June 2013

Contributing Author – PricewaterhouseCoopers, LLC Publication: *Perspectives in Higher Education, New Business Models for Academic Medical Centers*, Published – September, 2012

Dissertation - *Information Technology, the Change Process, and Customer Service in Higher Education Administrative Services*, Published in May 2003