

# 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*

## EXPERIENCE

### **MOREHOUSE SCHOOL OF MEDICINE – ATLANTA, GA**

OCTOBER 2013 – PRESENT

#### **SENIOR VICE PRESIDENT FOR OPERATIONS AND CHIEF FINANCIAL OFFICER**

OVERSEE ALL OPERATIONS AND FINANCES FOR THE INSTITUTION.

### **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 include 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. Concentrate on developing new business models, organizational vision, strategy and goals, and change management with leadership. This includes 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 Firm, and executing on projects for success.

#### Significant accomplishments/responsibilities

- Utilized past 25 years of relationships for quick client business development activities. Currently executing projects with previous clients from FJ Case Consulting, LLC.
- Current business includes four major (Top 100) universities and medical schools.
- Executing on over \$4.0M in current engagements in 2012
- Developed and executing 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
- Develop and execute vision and strategy in the Higher Education environment
- Review, analyze, and recommend 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
- Coach current leaders and managers in shared service implementations on 3 specific academic medical center projects
- Responsible for all aspects of contracting, project management, delivery, quality, invoicing, and collections for current clients and projects
- Work 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 all 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

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

## ACTIVITIES

Member – Executive Doctorate Alumni Advisory Board, University of Pennsylvania, 2011-Present  
Member – Converting Hearts Ministries Development Board, Creedmoor, NC, 2011-Present  
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

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

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

## **REFERENCES**

Available upon request