

F. John Case, Ed.D.

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EDUCATION

Doctor 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*

CITIZENSHIP United States of America

EXPERIENCE

FJ CASE CONSULTING, LLC – MOUNT PLEASANT, SC
JANUARY 2023 – PRESENT

PRESIDENT AND INDEPENDENT CONSULTANT (FJCASECONSULTING.COM)

Based on my over 35 years of experience in higher education, non-profits, and for-profit organizations, continuing my consulting service to: 1) help educational, for profit, and non-profit organizations achieve their vision through effective strategic financial leadership and analytical reviews of specific functions; 2) assist organizations with Interim Leadership roles as needed; 3) work with organizations on functional assessments and improvement needs in the organization; 4) work with new and entrepreneurial organizations to achieve their vision and goals through special project work or specific goals in their strategic plan; and 5) help young adults and professionals achieve their personal best through mentoring, coaching, and motivational speaking. My current full-time client is Balwin Wallace University (Berea OH) as the Interim Chief Financial Officer, overseeing the operational and strategic finances for the Ohio-based liberal arts school. Prior to that, was the Special Advisor, Financial Strategy for the new President, Board of Trustees, and Senior Leadership team (6 months) at Balwin Wallace. Immediately prior to this position, I was at the Berklee College of Music (Boston MA) as the Interim Chief Financial Officer and Senior Financial Advisor for the college (2+ years). The position included oversight of all finance, reporting, auditing, investment, risk management, and operational areas (facilities, real estate, public safety, auxiliary services, and purchasing). The focus was improved leadership and restructuring in the various functional areas, Workday Optimization, budget review and reductions, annual Financial Statement and Uniform Guidance audit improvements, financial reporting/data analysis creation and presentation, and strong leadership for improved financial and operational results. Previous clients include California University of Science and Medicine, Emory University, Emory School of Medicine, and Grady Health System (others listed on web site).

HURON CONSULTING GROUP, CHICAGO, IL
APRIL 2023 – AUGUST 2023

SENIOR CONSULTANT

Hired as a contractor into the Strategy and Operations business line, work with Higher Education institutions, Academic Medical Centers, and Health Care organizations improve their business models, review organizational structures, and review process, procedures, and

workflow to increase efficiency and effectiveness. Also, work as an interim senior leader for organizations that need expertise in the areas of finance, operations, research administration, and medical school and health care leadership. Based on long-term commitment of my consulting services, I left Huron in August 2023.

MOREHOUSE SCHOOL OF MEDICINE (MSM) – ATLANTA, GA
JULY 2021 – DECEMBER 2022

EXECUTIVE PRESIDENT FOR OPERATIONS AND BUSINESS AFFAIRS

The Executive Vice President for Operations and Business Affairs (EVPOBA) served as the primary advisor to the President and CEO on all administrative and operational business issues and worked collaboratively with the other members of the President's Cabinet/ Executive Leadership team to plan, manage, and optimize resources to achieve the school's strategic priorities. Responsible for directing, administering, and coordinating all operational and business affairs activities for auxiliary, facilities, campus police, business services, information technology, governmental financial partnerships, external partnerships, capital planning and project services, and acquisitions in accordance with objectives established by the President and CEO in alignment with MSM's and Morehouse Health Care (MHC – faculty practice plan) strategic initiatives. The EVPOBA ensured all systems, processes and business workflows related to all operations and business affairs at MSM perform at a high function. The EVPOBA worked collaboratively with Chief Financial Officer (CFO) on all financial issues managing the school's financial assets, both within each of the functional areas under their direct responsibility. The position took the leadership role in all new partnerships/acquisition opportunities related to the strategic direction of MSM.

Significant accomplishments/responsibilities

- Completed due diligence with team to acquire an Atlanta based hospital for the faculty practice plan (decision – not to acquire)
- Lead MSM executive to oversee new CommonSpirit Health (CSH) and MSM partnership – total investment over \$300M expanding all UME and GME educational and research activities in CSH hospitals.
- Responsible for executing an \$85M sale of the health care and apartment property on campus through an additional and complex public-private partnership deal for the school and developer.
- Worked in conjunction with Grady Health System and MHC leadership to execute new governance and process for faculty practice plan billing, collections, and service contract.
- Planned, negotiated, and completed various real estate and construction related facility projects to enhance the educational, research, and clinical missions for the school. Total facility values of over \$200M.
- Reviewed acquiring an Orthopedics Physician Practice to enhance the MHC providers and services to the Atlanta community.

SENIOR VICE PRESIDENT FOR OPERATIONS AND CHIEF FINANCIAL OFFICER
OCTOBER 2013 – JUNE 2021

Oversaw 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, faculty practice plan (MHC) operations and finance, hospital affiliations and agreements, 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

- Effectively negotiated a \$65M Public Private Partnership to build first-ever apartments, a health care facility, and wellness center, and amenities adjacent to the campus a multi-purpose facility for the school through a public-private partnership. This included all aspects of the project from site review, development, contracting, financing, and delivery of all buildings for the school.
- Increased collections rate and reimbursements for MHC, created operational efficiencies for clinic sites, and worked with leadership on strategic model for faculty practice plan
- 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 six 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 negotiated
- Oversaw 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 a new administrator organizational structure throughout the organization

ADJUNCT ASSISTANT PROFESSOR, COMMUNITY HEALTH AND PREVENTIVE MEDICINE DEPARTMENT, 2019 - DECEMBER 2022

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, faculty practice plans, 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, Faculty Practice Plans, 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

PRESIDENT AND INDEPENDENT CONSULTANT

Based on my 25 years of experience in higher education, non-profits, and for-profit organizations created a consulting service. Services included: 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, the Lawson Grants module, and spreadsheet tools
- 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 a 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 serve all academic and medical units more effectively

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
ASSISTANT VICE PRESIDENT AND CONTROLLER**

UNIVERSITY OF ROCHESTER – ROCHESTER, NY
JULY 1986 – SEPTEMBER 1995

**RESEARCH PROGRAM MANAGER - DEPARTMENT OF MEDICINE, SCHOOL OF
MEDICINE AND DENTISTRY
DIRECTOR, GRANT & CONTRACT ACCOUNTING, FINANCE DEPARTMENT
FINANCIAL ANALYST/UNIVERSITY COST ACCOUNTANT, FINANCE DEPARTMENT**

TEACHING ACTIVITIES

Morehouse School of Medicine SEPTEMBER 2015 – DECEMBER 2022
MPH 511 Course – Financial Management for Public Health Managers
The Principles of Accounting Series – lecture series for the Master of Public Health program.

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/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 3-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, 2022-2024
Chair, Group on Business Affairs, Association of American Medical Colleges (AAMC), 2019-2020
Member, Group on Business Affairs Steering Committee, AAMC, 2016-2021
Board Member, Atlanta Community Food Bank, 2017-2022
Treasurer, Atlanta Community Food Bank – Finance and Investment Committee, 2018-2021
Board Member, 3Star Communities (Atlanta, GA) 2017-2022
Member of Leadership Atlanta, Class of 2016 (Annual Opening Retreat Co-Chair, 2018-present)
Board Member, Finance and Investments Committee, Sigma XI, The Scientific Research Society. 2015-2018
Member – Executive Doctorate Alumni Advisory Board, University of Pennsylvania, 2011-2015
Member – Converting Hearts Ministries Development Board, Creedmoor, NC, 2011-2014
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)
Member of the Leadership Reno-Sparks, Class of 1997

PUBLICATIONS

Chapter Author – Management and Leadership Skills for Medical Faculty, A Practical Handbook, Chapter 11 – Managing Managers, Published by Springer in 2016.

Co-Author – National Association of College and University Business Officers (NACUBO), *Control-Center Services*, Published in December 2015

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

REFERENCES - Available Upon Request