

GLEN R. NELSON, Ph.D.

ADMINISTRATIVE APPOINTMENTS

- California State University Monterey Bay
Vice President for Administration and Finance/CFO, 2021–2024
- Idaho State University
Vice President, Finance and Business Affairs, 2019-2021
- Arizona State University
Special Advisor to the Executive Vice President, Treasurer and CFO, 2014-2019
Associate Dean, College of Nursing and Health Innovation, 2014-2018
Associate Dean, College of Health Solutions, 2014-2016
- Arizona Board of Regents for the Arizona University System
Senior Vice President for Finance and Administration, 2010-2013
- University of Wisconsin System Administration
Associate Vice President for Financial Administration, 2008-2010
- Oregon University System
Assistant Vice Chancellor, Chief Budget Officer, 2005-2008
- Colorado School of Mines
Controller and Director of Fiscal Services, 2002-2005
- Colorado Christian University
Vice President for Business Affairs & Chief Business Officer, 2000-2002
- University of Nebraska-Lincoln
Assistant to the Vice Chancellor for Business and Finance, 1997-2000
Director of Shared Services and Financial Analysis, 1998-2000
Assistant Director for Fiscal Affairs, 1996-1997

ACADEMIC APPOINTMENTS

Research Professor	Idaho State University	2019-2022
Professor of Practice	Arizona State University	2014-2018
Faculty Associate	Arizona State University	2011-2013
Staff Affiliate Faculty	University of Wisconsin-Madison Center for the Advancement of Postsecondary Education	2008-2010
Faculty Associate	Regis University	2003-2013

EDUCATION AND CERTIFICATION

- Ph.D., Educational Leadership & Higher Education, University of Nebraska, Lincoln, Nebraska, 2008
- M.B.A., International Management, American Graduate School of International Management, Thunderbird Campus, Glendale, Arizona, 1982
- B.S., Business Administration, University of Nebraska, Lincoln, Nebraska, 1981
- CMA – Certified Management Accountant, 1989

SPONSORED ACTIVITY AND RECOGNITION

\$250,000 (2018, Co-Principal Investigator): *Using Income Share Agreements to Facilitate College Completion*. Funder: Vemo Education, Oakton, Virginia

\$10,000,000 (2018, Co-Principal Investigator): *Pediatric Affiliation and Research Collaboration*. Funder: Phoenix Children's Hospital, Phoenix, Arizona

\$11,000,000 (2018, Principal Investigator): *Mission Support and Workforce Development, Renewal 1*. Funder: Dignity Health: St. Joseph's Hospital & Medical Center, Phoenix, Arizona

\$11,000,000 (2017, Principal Investigator): *Mission Support and Workforce Development*. Funder: Dignity Health: St. Joseph's Hospital & Medical Center, Phoenix, Arizona

\$49,766 (2016-2017, Co-Principal Investigator): *Improving Transparency in College Costs: Examining College Attendance in the Era of Differential Tuition Practices*. Funder: Spencer Foundation, Chicago, Illinois

\$265,000 (2015-2016, Lead Principal Investigator): *Interprofessional Integrated Care Team Training Model*. Funder: Mercy Maricopa Care, Phoenix, Arizona

IPEDS Finance Working Group, National Center for Education Statistics, Washington, DC. Appointed to the working group. (2023 - 2025) Nelson, G.

IPEDS Technical Review Panel, National Center for Education Statistics, Washington, DC. Invited panelist, Organizing a Working Group for the IPEDS Survey Component. (2023) Nelson, G.

IPEDS Technical Review Panel, National Center for Education Statistics, Washington, DC. Invited panelist, Monitoring Emerging Issues in Higher Education. (2019) Nelson, G. & Wolniak, G.

Affordability and Transparency Initiative, A joint research collaborative established at New York University (2017 - present), co-founders Wolniak, G., **Nelson, G.**, & George, C.E., currently housed at the Center for Economic Education, University of Louisville. <http://louisville.edu/education/centers/economic-ed/research>

Fulbright Specialist Roster Candidate, March 2015. Candidates are selected for a five-year appointment and are eligible for a two to six week grant opportunity through the specialist program in response to requests by foreign entities through the U.S. Department of State Bureau of Educational and Cultural Affairs.

Fulbright Educational Experts Seminar "Do More with Less – Implementing Change in Higher Education Management in Germany", October 2012. One of fifteen senior level higher education leaders invited to Germany for participation in a five-day higher education leadership seminar.

ADMINISTRATIVE ACCOMPLISHMENTS

California State University Monterey Bay, Seaside, California

Vice President for Administration and Finance/CFO and Business Affairs, 2021 - 2024

Served as the Chief Administrative Officer. Responsible for leading the accounting, budgeting, human resources, university police, information technology, facilities and auxiliary organizations. Served as Executive Director of the University Corporation, a 501c3 organization, responsible for auxiliary operations and real estate development.

CSUMB - 7,000 students...2 locations... \$240 Million budget

- Implemented a strategic change within facilities management to increase customer service and flexibility through the addition of more labor hours at no additional cost.
- Developed a culture of budget discipline by eliminating a \$22 million structural deficit and developing a new transparent budget model based upon IBB concepts and incentives for localized performance.
- Improved relations with surrounding government agencies. Negotiated an agreement to implement a recycled water conversion, significantly increasing our water allocation and furthering our sustainability efforts.
- Developed strategy to divest of non-performing assets to align resources with university priorities such as retention and recruitment.

Idaho State University, Pocatello, Idaho

Vice President for Finance and Business Affairs, 2019-2021

Served as the Chief Financial Officer/Chief Business Officer of the university. This includes leadership of the accounting, budgeting, human resources, campus safety, information technology, and facilities organizations.

ISU - 13,000 students... 4 locations... \$250 Million budget

- Successfully led the campus through an exercise eliminating a \$12 M structural deficit.
- Completed a \$20 million academic building addition and negotiated a long-term agreement to supply state-of-the-art equipment in return for naming rights.
- Identified and implemented strategy to increase revenue from treasury operations by approximately \$1.0 million per year.
- Co-lead of the system-wide team that envisioned and created a new Idaho State Board of Education policy for tuition and fees.

Arizona State University, Tempe, Arizona

Special Advisor to the Executive Vice President, Treasurer and CFO, 2014-2019

Associate Dean, College of Nursing and Health Innovation, 2014-2018

Associate Dean, College of Health Solutions, 2014-2016

Responsible for leading university-wide strategic initiatives at the direction of the ASU Executive Vice President and provide leadership for the business, finance, and strategic planning functions for both colleges and two healthcare clinics.

ASU - 114,000 students... 5 locations... \$2.4 Billion budget

- Developed partnership and funding model to generate \$6.5 million in new funds to launch a joint research collaborative between ASU and Dignity Health.
- Created a plan to coordinate all non-degree certificate offerings for the College of Health Solutions and College of Nursing and Health Innovation to generate new revenue and enhance the national brand recognition of both colleges.
- Administrative leader and mentor, collaborating with faculty and students from ASU, the University of Arizona and Northern Arizona University, and officials from the state and county in establishing and providing administrative direction to the student run health clinic for the homeless. Nearly 1,000 individuals received services in 2016.
- Led a cross functional team in the creation of a business plan for the college run Nurse Practitioner Healthcare Clinic expanding the services from the student population to the surrounding community. The plan will fully integrate the clinic into the academic mission of the college by providing opportunities for faculty practice, a working lab of inter-professionalism, and further embed ASU into the Phoenix community. Execution of the plan successfully eliminated a \$700,000 annual deficit while increasing patient and student satisfaction.
- Designed a business plan for the WORLD Institute, a new academic and research collaboration between ASU and the Harvard affiliated hospitals, Dana-Farber Cancer Institute, and Brigham & Women's Hospital.
- Identified accounting standards, legal hurdles, and the changes required to the state statutes to facilitate a change in ASU financial reporting from a GASB to FASB basis.
- Assigned responsibility for the two ASU golf courses, working as the relationship manager with the outsourced management team, with the goal of restoring fiscal stability in one, while developing and growing the other.

**Arizona Board of Regents for the Arizona University System (ABOR), Phoenix, Arizona
Senior Vice President for Finance and Administration, 2010-2013**

State Higher Education Fiscal Officer (SHEFO) and System CFO providing leadership across the University System for Finance, Information Technology, Human Resources, Capital Planning, Internal Audit, and Enterprise Metrics. Chair of the Finance Council comprised of the university CFO's and the IT Council comprised of the university CIO's.

ABOR - 143,000 students... 3 universities... 2 medical schools...1 hospital... \$4.2 Billion budget

- Developed and instituted a financial analysis and reporting process to give meaningful fiscal data to the Board of Regents, increasing the transparency of university operations and better informing the Board of the fiscal impacts of their policy decisions.
- Responsible for capital construction process working with campus facilities and capital planning departments, the governing board and legislative committees. Capital construction projects from the project approval stage through completion totaled over \$600 million and added 1.6 million square feet from 2010-2013. Refinanced over \$360 million of debt resulting in savings in excess of \$38 million.

- Lead fiscal representative for the “Getting Ahead” grant for Arizona funded by the Lumina Foundation. Co-chair of the team that created a performance based funding model. This is the first performance based funding model in the U.S. that based all new funding on the achievement of performance objectives.
- Collaborated with the Chief Academic Officers of the system and universities to lead a system- wide effort to develop, refine, and design a measurement and reporting process for enterprise metrics.
- Improved the tuition and fee setting process within Arizona University System by instituting a disciplined and diligent review of the fiscal impact of the proposed changes and their relationship to the campus strategic plans.
- Provided Fiscal and Strategic Planning input and direction for the University of Arizona’s College of Medicine - Phoenix executive team. Negotiated with legislative staff to reestablish state investment to the levels initially identified for supporting the new medical college.

**University of Wisconsin System (UWSA), Madison, Wisconsin
Associate Vice President for Financial Administration, 2008-2010**

Provide leadership to the Office of Financial Administration, which has the primary responsibility for the fiscal integrity of the University of Wisconsin System. Specific areas of responsibility include system wide Accounting and Budget Control, Financial Analysis and Reporting, Fiscal and Administrative Policy Development, and the Shared Financial System (SFS) Operations and Development.

UWSA - 170,000 students...13 Universities...1 medical school...1 hospital... \$5.5 Billion budget

- Successfully managed and completed the \$10 million SFS interface required for a new PeopleSoft payroll system used by the 13 universities of the University of Wisconsin System. The SFS operation is responsible for the day-to-day production activities of the accounting system and the on-going development activities of a system-wide ERP system.
- Instituted procedural changes within the financial administration department to strengthen financial controls. The process resulted in identification of significant anomalies in the fringe pool calculation and un-reconciled accounts containing several million dollars of unrecorded cash.
- Served as the senior finance executive on the system-wide committee on veteran’s issues dealing with both the Federal GI Bill and Wisconsin GI Bill.
- Led the effort in the creation of a plan to establish procedures to aid in the compliance with Circular A-21 Indirect Cost requirements and successfully negotiated a three-year extension period with the Department of Health and Human Services to allow time for full compliance.
- Co-leader of the Common Systems Review Group which is comprised of a cross section of Chief Academic Officers, Chief Information Officers, and Chief Business Officers representing the 13 UW institutions and system administration. This group provides leadership and oversight of the seven major IT systems utilized by the institutions within the University of Wisconsin System.

Oregon University System (OUS), Corvallis, Oregon
Assistant Vice Chancellor, Chief Budget Officer, 2005-2008

Leader of the organization coordinating the budget activities of the seven universities of the Oregon University System and member of the Chancellor's executive team. Manage interactions with the legislative and executive branches of the Oregon state government in regards to fiscal policies through interactions with legislators, legislative staff, the governor's staff, and representatives of other state governmental agencies.

OUS - 80,000 students... 7 Universities... \$2.5 Billion budget

- Negotiated settlement and plan with the executive and legislative branch staff to eliminate programmatic resource fees and adjust tuition to keep the university system fiscally whole.
- Identified the root causes of a substantial erosion of the fiscal position of an Oregon University. Subsequently worked with the university president and administrative team to outline a plan to return the university the targeted range of fiscal performance.
- Chair of Interagency Committee for State Risk Management representing the Oregon University System. Drove methodology change in the calculation of the state risk assessment formula, resulting in a savings of \$1.4 million per biennium to OUS.
- Co-Leader of the university bargaining team during contract negotiations with the faculty union at Eastern Oregon University resulting in a mutually agreeable settlement avoiding a threatened work stoppage.
- Successfully implemented changes to the budget planning model to allow for a more robust analysis and quicker turnaround of alternative strategies, giving policy makers better information during their deliberations.
- Member of leadership team that designed and vetted policy changes to separate the treasury function, employee benefits and retirement plan from the state of Oregon.

Colorado School of Mines, Golden, Colorado
Controller and Director of Fiscal Services, 2002-2005

Directed the Fiscal Services function for the Colorado School of Mines (CSM), a public research institution.

CSM - 4,500 students... \$60 Million budget

- Conducted negotiations with the Office of Naval Research to reestablish credibility in regards to Indirect Cost Rates. The institution was out of compliance for over eight years and in danger of losing federal funding. Actions were undertaken to place CSM in compliance with the Circular A- 21 and establish prospective rates prior to the beginning of the fiscal year for the first time in a number of years.
- Managed the structure and sale of two bond offerings including the investment and management of the bond proceeds. One of the bonds was for the development of a new student center and the other was a complex transaction involving the foundation, the university and a university controlled not-for-profit entity.
- Represented the institution in a non-resident alien IRS tax audit. Mitigated damages

and established new procedures to ensure future compliance. Worked with foreign student body to assist students in understanding the issue.

- Led effort to rewrite graduate student contracts to be in compliance with IRS regulations and served as the spokesperson to the students, faculty and news media on this controversial issue.

Colorado Christian University, Lakewood, Colorado

Vice President for Business Affairs & Chief Business Officer, 2000-2002

Member of President's Cabinet with responsibility for Student Financial Services, Accounting, Budget, Human Resources, Risk Management, Campus Safety, Auxiliary Services and Facilities Management.

CCU - 1,800 students... \$30 Million budget... Private faith based institution

- Developed and executed the financial plan for Colorado Christian University (CCU), which resulted in the first operating surplus in three years.
- Converted a non-performing asset to \$20,000,000 and maintained on-air advertising through the arrangement.
- Led the strategic planning process and campus master planning process.
- Served as an officer of the Colorado Christian University Foundation. Drafted the foundation's first investment and spending policy. I was instrumental in securing two of the university's largest five gifts in FY 2001.
- Managed the design, construction and financing of four residence halls and a cafeteria addition. This included negotiations with the planning and zoning divisions of the local government. Structured and completed the sale and leaseback of a newly constructed residence hall to mitigate risk to the university and improve the balance sheet.
- Negotiated an exclusive beverage arrangement, which raised the university's share of revenue on a 20 oz. soda from less than \$0.25 to over \$0.70.

University of Nebraska-Lincoln, Lincoln, Nebraska

Assistant to the Vice Chancellor for Business and Finance, 1997-2000

Director of Shared Services and Financial Analysis, 1998-2000

Assistant Director for Fiscal Affairs, 1996-1997

Served in the Chief of Staff role to the Vice Chancellor in support of the Business and Finance Departments and represented the Vice Chancellor when requested, while also managing and directing the Shared Services (Administrative Computing) and Financial Analysis Function.

UNL - 22,000 students... \$600 Million budget... Flagship & Land-grant institution

- Represented the university in planning and negotiations of a public-private partnership, which included the university, a private corporation and the city, in the development and building of a baseball and softball complex to house the university's NCAA teams, a minor league baseball team and a venue for city events.
- Provided financial leadership and oversight on a \$36.1M bond project for the construction of skyboxes and improvements to Memorial Stadium. Careful management

of the cash flow while working closely with the Facilities Project Manager resulted in arbitrage earnings of over \$125,000.

- Initiated a process of operational reviews for auxiliary units. These reviews led to the updating and changing of numerous rates across campus. In some cases, the data was used to prove that outsourcing would not be the most profitable or beneficial alternative.
- Led team in the development and implementation of a peer-driven recognition and reward program within Business & Finance at UNL.
- Created and staffed the Business & Finance Shared Services Organization to deliver technology- based solutions to business functions in an effort to streamline processes. This team of IT professionals served the administrative computing needs of the Business and Finance Organization from hardware support and software solutions to complex database applications.
- Led a multi organization effort to develop a consolidated student bill, combining student bills from six departments, decreasing student and parent complaints while protecting each department's revenue stream.

CORPORATE ACCOMPLISHMENTS

Fourteen years of corporate leadership experiences gained working as a financial analyst, auditor, and accountant while managing teams of accountants, financial analysts, and IT professionals in large multinational corporations (US West, Motorola, Merrill Lynch).

- Led financial planning and analysis responsible for budget planning and the fiscal analysis of a \$3.5 billion annual expenditure budget and \$5.0 billion capital budget.
- Prepared accounting and economic testimony for negotiations with multiple state public utility commissions.
- Managed a team of analysts and IT professionals responsible for the definition, design and implementation of a \$3.5M document image processing system for a new accounts payable process, which reduced the staff from over 350 positions in four locations to less than 90 positions in one center while improving customer service.
- Uncovered inappropriate activity between senior leadership and a major distributor in one of our international subsidiaries, which resulted in organizational change and development of new procedures and controls.
- Recognized for identifying and eliminating accounting process deficiencies while generating audit recoveries in excess of \$1.0 million per year.
- Member of process improvement teams utilizing the first versions of Six Sigma tools prior to Motorola sharing them with industry.
- Received President's Circle award four different years based upon creating innovative solutions, successes leading process improvement teams, and demonstrating outstanding leadership.
- Charter member of the US West Finance Pluralism Council and facilitator of the multicultural experience workshop.

SELECTED PUBLICATIONS

Davis, L.D., Wolniak, G.C., George, C.E., & **Nelson, G.R.** (2019). Demystifying Tuition? Building a framework for informational quality and accessibility. AERA Open.

Wolniak, G.C., George, C.E., & **Nelson, G.R.** (2019). The Emerging Differential Tuition Era among U.S. Public Universities. In P. Teixeira, A. Magalhães, M. Rosa, & A. Veiga (Eds.), *Under Pressure - Higher Education Institutions Coping with Multiple Challenges*. Rotterdam, Netherlands: Brill Publishers.

Nelson, G.R. (2008). Differential Tuition by Undergraduate Major: Its Use, Amount, and Impact at Public Research Universities. Dissertation. <http://digitalcommons.unl.edu/cehsedaddiss/5/>

SELECTED PRESENTATIONS

Nelson, G., Wolniak, G., & George, C.E. (2018). *Institutional Policy and the Struggle to Maintain Tuition Transparency in an Increasingly Complex Environment*. May 10-11, 2018. Higher Education in the Era of the States: Elevating Equity and Advancing Public Policy, University of Denver Public Policy Forum, Denver Colorado.

Nelson, G., Wolniak, G., & George, C.E. (2017). *Differential tuition and enrollment patterns of students from low socioeconomic status backgrounds at a public research university*. November 27- December 1, 2017. International Journal of Arts & Sciences International Conference for Education, Freiburg, Germany.

George, C.E., Wolniak, G., Nelson, G., & Colston, J. (2017). *Navigating the complexities associated with financial aid and tuition policies*. November 8-11, 2017. Association for the Study of Higher Education. Houston, TX.

Nelson, G., Wolniak, G., & George, C.E. (2017). *Unmasking College Costs: Challenges in the Era of Differential Tuition*. April 27-May 1, 2017, American Education Research Association. San Antonio, TX.

Wolniak, G., George, C.E., & Nelson, G. (2016). *Innovative Approaches to Generating Revenue: Exploring the Ramifications, Improving Transparency in College Costs in the Era of Differential Tuition Practices*. November 9-12, 2016. Association for the Study of Higher Education, Columbus, OH

Nelson, G. (2016). *Introduction to Higher Education*. October 3, 2016. Western Association of College and University Business Officers Workshop. Anaheim, CA.

Harrell, E., Lamb, G., Manson, L., Nelson, G, Saewert, K. (2016). *Teamwork Training In Integrated Care: Navigating the Nexus in Real-Time*. August 22-23, 2016. National Center Summit on the Future of Interprofessional Practice and Education. Minneapolis, MN.

Nelson, G. (2016) *Governance and Culture in Higher Education*. August 4, 2016. WACUBO Business Management Institute. Santa Barbara, CA.

George, C.E., Wolniak, G., Nelson, G., & Allen, D. (2016). *Investigating and Describing Trends in Undergraduate Differential Tuition Policies at Public Four-Year Universities*. April 7-12, 2016. American Education Research Association. Washington, D.C.

Nelson, G., George, C.E., Wolniak, G., Druery, X., Williams, X., & Moramarco, M. (2016). *Postsecondary Differential Tuition Practices: Challenges to Researching College Affordability*. March 16-18, 2016. Association for Education Finance and Policy. Denver, CO.

Nelson, G. (2015). *Introduction to Higher Education*. July 13-14, 2015. Western Association of College and University Business Officers Workshop. Denver, CO.

Nelson, G. (2015). *Financial Accountability in Ministry*. June 24-26, 2015. Global Symposium on Financial Accountability in Christian Ministry, Christian Council for Financial Transparency Korea (CCFK). Seoul, South Korea.

Nelson, G., Chow, D., Bernstein, S. & Lentz, G. (2013). *An Examination of Differential Tuition from Multiple Perspectives*. May 18-21, 2013. Association for Institutional Research Annual Forum. Long Beach, CA.

Nelson, G., Chow, D., & Goldman, J., (2012). *When is college pricing like airline pricing? An examination of differential tuition by major and level and the fiscal, reporting and policy implications*. June 2-5, 2012. Association for Institutional Research Annual Forum. New Orleans, LA.

Nelson, G. (2009). *Tuition differentials used to address financial stress: recent trends & impacts*. March 2-5, 2009. International Leadership Conference of the Chair Academy, Nashville, TN.

Nelson, G. (2009). *The Prevalence and Impact of Differential Tuition in Public Research Institutions*. March 25, 2009. Wisconsin Center for the Advancement of Postsecondary Education Forum. Madison, WI.

Nelson, G. (2008). *Differential Tuition by Undergraduate Major at Public Research Universities*. October 5-7, 2008. Central Association of College and University Business Officers. Fort Lauderdale, FL.

Nelson, G. (2005). *Non-Resident Alien Tax Issues for Higher Education*. May 2005. Colorado Fiscal Managers Association. Breckenridge, CO.