



DAVID MADDOX

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EDUCATION

B.A. MUSIC - AMHERST COLLEGE, 1982
 A.M. HUMANITIES - UNIVERSITY OF CHICAGO, 1984
 M.B.A. - VANDERBILT UNIVERSITY, 1991



Relevant Experience

- Consultant and administrator with 24 years of experience in higher education and the nonprofit sector.
- Founder and Principal of RPM Associates (14 years). Prior to starting this firm, spent 3½ years as a specialist in business process redesign and operations improvement in KPMG's Higher Education Consulting practice. Previously held management positions at the University of Chicago and Vanderbilt University.
- Supported three of the major projects at universities to transform institutional budget structures.
- Designed and applied innovative uses of management techniques in the higher education sector.
- Author of the book *Budgeting for Not-for-Profit Organizations*, published by John Wiley & Sons (1999).
- Faculty member, Belmont University.
- Consulting projects and work experience have covered a wide range of functions, issues, and approaches, including:

Strategic Planning
 Financial Analysis and Modeling
 Business Process Redesign
 Communications
 Benchmarking
 Activity-Based Costing

Budgeting
 Policy Analysis
 HR, benefits, and Compensation
 Organization Assessment
 Auxiliary Operations
 Facilities

Representative Clients

Mr. Maddox's clients have included:

American Society of Civil Engineers
 Bellarmine University
 Brandman University
 The Brookings Institution
 Catholic University of American
 Dartmouth College
 Fordham University
 Fort Lewis College
 Goshen College
 Humboldt State University
 Iowa State University
 Long Island University
 Louisiana Community and Technical
 College System

Middle Tennessee State University
 Morehouse School of Medicine
 Nashville Zoo
 Ohio State University
 Philadelphia University
 Siloam Family Health Clinic
 Southern Adventist University
 Tennessee Department of Children's
 Services
 Texas Southern University
 United Way of Metropolitan Nashville
 University of Alaska
 University of British Columbia
 University of California, Berkeley

University of California, Davis
 University of California, Irvine
 University of California, Santa Cruz
 University of Chicago
 University of Montana Foundation
 University of North Carolina,
 Greensboro
 University of Redlands
 University of Texas at Austin
 University of Washington
 Vulcan Northwest, Inc.
 Washington University in St. Louis
 Yale University



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Representative Accomplishments

- Assisted three major research universities in developing and implementing Responsibility Center Budget models. Services included groundwork assessments of goals and values, design of budget model parameters, creation of financial models to test proposals, assessments of stakeholder readiness for change, and project communications and project management.
- Developed detailed internal cost models for programs, primary organization divisions, and major mission segments for several private colleges. These were used to support strategic planning, financial analysis, and budget development. At one institution, used the model as the basis for leading a scenario planning process for one of its professional programs. At another school, developed a cost allocation model and revenue contribution model for medical school programs.
- Developed a faculty utilization and enrollment planning model for private colleges which has been used by academic leaders to guide faculty resource allocation decisions to assess the impact of program growth.
- Worked with several institutions in reviews of administrative costs, ranging from institution-wide analyses on comprehensive surveys of process costs to brainstorming with client groups about new business models. Led a staff group in researching Shared Service Models for administrative services.
- Reviewed and recommended improvements to budget processes at several institutions, looking at governance structures, communications, and funding methods.
- Working with a private university to develop a business model to offer support services to other institutions in developing direct assessment, online Competency Based Education degree programs. Services would include administrative and academic solutions.
- Worked with institutions to assess the management and funding of Information Technology. Advised one institution on the balance between central and local control of various services and funding models for network and related services.
- Conducted customized policy and benchmarking studies for individual institutions on topics such as the funding environment and competitive position of the institution's research enterprise, policies related to allocation of federal Indirect Cost Recovery funds, and state government support of research.
- Developed an impact statement for a university that combined traditional economic impact methodologies with broader concepts of impact that used data from multiple sources in new ways. This study helped the institution redefine its impact on its community.
- Led comprehensive redesign of processes in the human resources function and facilitated development of an institutional philosophy of human resources management.
- Developed institutional systems for performance tracking and accountability and advised client staff on applying the NACUBO methodology for measuring the cost of education.
- Led several non-profit organizations through the development of strategic plans.
- Assessed finance and administrative operations of university departments at various universities.
- Conducted reviews of financial management and controls at numerous non-profit organizations.
- Led a public human services agency through comprehensive mapping of its administrative processes in preparation for major systems development.



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Professional Background

Mr. Maddox's career in higher education began in 1990 and led him through the following positions:

- Manager of Administrative Services, Human Resource Services, Vanderbilt University
- Senior Analyst, Human Resources and Administration, University of Chicago
- Interim Director, University Bookstore, University of Chicago
- Deputy Director, Office of Financial Planning and Analysis, University of Chicago
- Manager, Higher Education Consulting, KPMG LLC
- President, Resource Planning and Management Associates

As Deputy Director of the Office of Financial Planning and Budget for the University of Chicago, he managed the process for developing the University's \$790M annual operating budget and staffed the University Budget Committee.

He joined KPMG's Higher Education Consulting practice in 1996 and specialized there in business process redesign, operations improvement, and financial analysis. At KPMG he adapted and applied techniques of activity-based costing, process redesign, balanced scorecard systems, contribution analysis, and financial modeling.

In 2000, he left KPMG to start his own consulting practice, continuing to serve colleges and universities.

Publications and Presentations

"Breaking Bad (Habits): Using Quantitative Models to Prompt Dialogue Between Faculty and Administrators," WACUBO Annual Meeting, May 2014

"How to Design and Implement a Budget Model in 16 Months," WACUBO Annual Meeting, June 2013

"Activity-Based Budgeting: UW's Experience," WACUBO Annual Meeting, May 2012

Faculty member, Collegiate Management Institute (CACUBO). Instructor on budgeting and strategic planning, 1998 to 2009.

"The Financial Prospects of Scientific Research," NACUBO Annual Meeting, July 2007

"Managing and Improving Processes and Policies," presentation, Tennessee Independent Colleges and Universities Association (TICUA), Chief Financial Officers Retreat, November 2005

"Fee for Service Programs: Design and Delivery," seminar, Nashville Career Advancement Center, January 2005

"Planning Strategy and Managing Budgets: How Do You Do Both," seminar, Southern Adventist University, November 2004

"A Financial Perspective on Strategic Planning in Higher Education," presentation, TICUA Chief Academic Officers Retreat, March 2004

"Budgeting-Planning-Management: Dilemmas and Responses," presentation, TICUA Chief Financial Officers Retreat, December 2003

"The Psychology of Budgeting: Incentives and Gamesmanship," article, *Management Issues*, May 2000

"Making the Case for Budgeting," article, *Management Issues*, November 1999

"Client-Oriented Organization of Human Resources Professionals," presentation, College and University Personnel Association National Conference, October 1999

Budgeting for Not-for-Profit Organizations, John Wiley & Sons, June 1999. (ISBN 0-471-25397-9)

"Authority, Influence and Reengineering," presentation, College and University Personnel Association National Conference, October 1998

"Turnaround Management," presentation, *21st Century Leadership in Higher Education* conference, December 1997

"Rethinking the Budgeting Process: Responsibility Center Budgeting," presentation, *AICPA Not-for-Profit Industry Conference*, June 1997

"Beyond the Company Town: The Future of Outsourcing," article, *Management Issues*, March 1997

"Activity-Based Costing," presentation, *21st Century Leadership in Higher Education* conference, December 1996

