2023–24 NACUBO FELLOWS
Participant Biographies
David Allen
Virginia Commonwealth University

David Allen is the assistant vice president for budget, analysis, and financial planning at Virginia Commonwealth University (VCU) in Richmond where he has worked since 2009. VCU is a top-100 R1 institution with a comprehensive health center as well as abundant undergraduate and graduate programs focusing on underserved populations.

In his role, Allen focuses on financial management at various levels including responsibility for the development and monitoring of the university’s more than $1.3 billion budget. In addition, he is responsible for the yearly development and implementation of the university’s RCM-style budget model. He also oversees and manages the university’s multi-year financial planning tool for senior leadership and the development and implementation of budget plans for the university’s strategic initiatives.

Over his career, he has been the associate dean for business and administration for a school of nursing, the director of administration for the Center of Clinical and Translational Science and has worked in various roles within the VCU School of Medicine. David has a Ph.D. in health outcomes research from VCU and is a CPA with a master’s degree in accounting and information systems from Virginia Tech. In addition to his administrative roles, he enjoys engaging and educating students through an Introduction to the University class for first-time freshmen as well as teaching several doctorate-level classes.

Dylan R. Baker
University of Maryland

Dylan R. Baker is the assistant vice president for finance in the Office of the Provost at the University of Maryland, College Park. He serves as the chief financial and budgetary advisor to the provost, providing financial leadership for the strategic planning, financial aid, enrollment management, and academic investment efforts that comprise the university’s $1.5 billion annual, academic operating budget.

Baker works closely with the chief financial officer and college budget officers to continually improve campus resource management by utilizing process improvement tools and applications aimed at increasing efficiency and consistency. As a data-driven leader with over 10 years of campus experience, he is widely regarded as an excellent problem solver who expertly applies his extensive knowledge of financial systems, budget models, complex disparate data analysis and policy development toward the achievement of diverse strategic goals. Prior to working in higher education, Baker was entrusted with key budgetary and financial roles in state and municipal government settings. At the Maryland General Assembly, he provided budgetary oversight of the State’s $50 billion pension system and its $5 billion personnel infrastructure, while at Miami-Dade County he conducted financial performance analyses of County business processes related to its capital investments. Baker holds a B.A. in International Business and a Master of Finance from Loyola University Maryland as well as a Master of Science in economic development from the University of Oxford. He is currently working on his dissertation as a Ph.D. candidate in the financial management program at the University of Maryland’s School of Public Policy.
Amy Beaulieu
Bridgewater State University

Amy Beaulieu serves as the associate vice president for finance at Bridgewater State University (BSU) providing executive leadership for Financial and Business Services. BSU is a public four-year institution serving approximately 10,000 students in southeastern Massachusetts. Since joining BSU nearly 20 years ago, Beaulieu has been recognized with increasing leadership responsibilities, serving as the assistant director of reporting and compliance, followed by service as comptroller. She is responsible for the university’s financial management and reporting, including budget and forecasting, treasury, accounting and financial reporting, student accounts, post grant management and component units’ financial operations. She is an advocate of strategic planning and process review, as well as providing a high level of internal and external customer service. Serving as the internal control officer, she ensures the effective design and operation of internal controls campus-wide and adherence to university and state policies related to financial and business operations. Her leadership has resulted in improved timeliness and processes related to financial reporting as well as leveraging technology to implement efficient and effective business practices. As a direct report to the chief financial officer, Beaulieu works closely with the senior leadership team on topics related to fiscal management and process improvement across campus operations.

In 2009 she received the Commonwealth Citation for Outstanding Performance for her work helping the university achieve its first ever Certificate of Achievement for Excellence in Financial Reporting Award from the Government Finance Officers Association, which it has now earned 14 consecutive years. She was a presenter at the EACUBO 2015 Annual Workshop on Title IV and Grant-Management Compliance Issues and Best Practices. Beaulieu earned her bachelor’s degree in accounting from Bridgewater State University. She enjoys traveling with her husband and two beautiful daughters.

Jennifer Condon
University of South Florida

Jennifer Condon is the vice president for business and finance, deputy chief financial officer, and controller for the University of South Florida (USF). In this role, Condon has direct oversight of the Controller’s Office, Procurement Services, Resource Management and Analysis, Housing and Residential Education, and the WUSF Public Media organization.

Condon received a Bachelor of Science degree from Clarkson University with a double major in accounting and finance and a concentration in technical communication. In 1995, she became a certified public accountant (CPA) in the state of Connecticut. After spending three years in public accounting to satisfy the experience requirement for CPA certification, Condon moved to educational administration and has spent her career at two universities—Yale University (seven years) and USF (17 years). Condon is a director for numerous boards of USF direct support organizations and is the current chair of the Interinstitutional Committee on Finance and Accounting.

In 2009 she received the Commonwealth Citation for Outstanding Performance for her work helping the university achieve its first ever Certificate of Achievement for Excellence in Financial Reporting Award from the Government Finance Officers Association, which it has now earned 14 consecutive years. She was a presenter at the EACUBO 2015 Annual Workshop on Title IV and Grant-Management Compliance Issues and Best Practices. Beaulieu earned her bachelor’s degree in accounting from Bridgewater State University. She enjoys traveling with her husband and two beautiful daughters.
Beth Corry
University at Buffalo

Beth Corry serves as the associate vice president for business services and controller at the University at Buffalo (UB), where she has worked for more than 27 years. In her role at UB, Corry has direct oversight and responsibility for financial management, business reporting and systems, purchasing and contract services, policy, compliance and internal controls, student accounts, print services and campus mail. Her team’s brand promise, “We’re Here to Help,” reflects Corry’s authentic leadership style and approach towards service delivery. Her leadership has resulted in transparent financial reporting and the utilization of technology to promote efficient and effective business practices.

Institutionally Corry serves as the university’s research foundation deputy operations manager, chairs the university’s Pricing Carbon Climate Action Committee, is a member of the leadership team for several operational excellence initiatives and is as an officer of the State University of New York (SUNY) business officers group. She works in partnership with all UB schools and departments and is a trusted advisor to senior university leadership.

Corry earned her Bachelor of Business Administration in accounting from Canisius College and is a certified public accountant.

Kelvin Davis
Delta State University

Kelvin Davis serves as the university comptroller and liaison to food service, bookstore, and vending at Delta State University, located in Cleveland, Mississippi. In this capacity, Davis is responsible for overseeing a range of departments, including the bursar, general accounting, accounts payable, budget, payroll, procurement, financial reporting, treasury, and food service, bookstore, campus card, and vending auxiliaries.

Over the course of his career, Davis has earned a reputation as a driven and results-oriented leader who can always be relied on to deliver. Under Davis’s leadership, the financial reporting processes and procedures at Delta State University have undergone a transformation, resulting in the timely submission of all mandated reports for the first time. Additionally, he implemented new budgeting processes during the COVID pandemic, revolutionizing the university’s budgeting process by reducing turnaround times and increasing transparency. Davis is an active member of several professional organizations, including SACUBO, NACUBO, and NACAS. Beyond his professional responsibilities, Davis is deeply involved in his community. He serves as a leader on various committees within his church community and is an active member of the Omega Psi Phi Fraternity, Inc. Davis holds a Bachelor of Science in political science, a Bachelor of Business Administration in accounting, and a Master of Business Administration, all of which he earned at Delta State University.
Lisa Easton
New Jersey Institute of Technology

Lisa Easton is the assistant vice president for strategic budget planning at New Jersey Institute of Technology (NJIT). A designated R1 Research University, NJIT is a public polytechnic research institute recently ranked as the #1 Public University by The New York Times College Ranking Tool. Since joining NJIT in 2007, Easton has remained dedicated to leading the university budgeting department to success through sound business development, strategic planning, and financial analysis and reporting.

In her current role, Easton oversees the university’s approximately $600 million annual operating budget, while leading the teams responsible for university budgeting and financial analysis, risk management, and financial systems. Easton also collaborates across the university to foster continuous quality improvements focusing on fiscal sustainability. In the spring of 2022, Easton led the campus-wide Strategic Budget Planning Committee charged with identifying fiscal sustainability initiatives at NJIT and is currently leading a multi-year budget model redesign project that will move the university from an incremental budget model to a new decentralized and data-driven resource-allocation model. This new innovative budget model will be incentive-based to encourage innovation within the divisions, leading to new and enhanced revenue streams. Easton is also co-leading a multi-year enterprise risk and reward management program aimed at installing best practices throughout the university to mitigate risk. Earning a B.S. in finance from Manhattan College and a master’s in finance from NJIT, Easton serves on various committees, such as the University Senate Committee on Finances, in addition to her role as an NACUBO Fellow.

Tim Graf
Princeton University

Tim Graf serves as the associate vice president of treasury services for Princeton University, where he is responsible for the university’s cash and working capital investments, liquidity forecasting, debt management, capital budgeting, banking operations, cashiering, disbursements, parent loans, long-range integrated financial planning, and mortgage services.

Prior to his position at Princeton, Tim served as the treasurer of Virginia Commonwealth University (VCU), and he previously served as the director of debt management at Virginia Tech.

Tim’s finance career began at Morgan Keegan (now Raymond James), where he worked in public finance investment banking as an associate/analyst.

Tim holds his B.S. and M.B.A. degrees from Virginia Tech, and he lives in Hopewell, New Jersey, with his two sons, ages 16 and 14.
Jill Larson  
College of St. Scholastica

Jill Larson is the executive director of finance and chief financial officer for the College of St. Scholastica, a private liberal arts college serving undergraduate and graduate students. She started in 2018 as the assistant controller, was promoted to controller in 2020, and most recently was promoted to this new role in 2022.

As both an operational and strategic partner, Larson is involved in institutional strategic planning to ensure long-term financial sustainability while also providing leadership and oversight to teams responsible for budget, financial reporting and compliance, treasury management, purchasing and p-card administration, accounts payable and receivable, and student accounts. Prior to joining higher education, Larson began her career in public accounting working for PWC before pursuing her passion for the nonprofit sector serving Minnesota K-12 charter schools. Larson earned her bachelor’s degree in accounting from the University of St. Thomas and is pursuing her master’s degree from the College of St. Scholastica.

Megan Lasso  
Montana State University

Megan Lasso is the chief budget officer at Montana State University (MSU), a prestigious R1 research university and the state’s land grant institution. With a career spanning over 18 years at MSU, Lasso has exhibited an exceptional record of service to the institution in several capacities. Beginning as a budget analyst, she steadily progressed through the ranks to become a budget/fiscal manager before ultimately assuming her current role in 2019. Throughout her career, Lasso has diligently honed her financial and institutional knowledge by participating in numerous initiatives and cultivating her strategic budgeting skills. As chief budget officer, she is responsible for the university’s $750 million annual operating budget. This encompasses a broad range of responsibilities, such as analyzing and preparing budgets, devising strategic implementation plans, and providing senior leadership with strategic budget and financial guidance. Additionally, Lasso coordinates the financial activities of unit-based fiscal officers and manages the university’s institutional investment processes, focusing on long-term returns and financial stability.

Lasso has been a key driver of several critical strategic initiatives at MSU. Her shared approach has resulted in consistent information for decision-makers, thereby enabling them to make informed decisions based on reliable and relevant data. Lasso is a valued member of several high-level committees, including the University Budget Council, Strategic Enrollment Management Committee, Equipment Fee Allocation Committee, Planning Council, and the Accreditation Writing and Review Team. Notably, she played a critical role as a key participant in the committee that developed MSU’s most recent strategic plan, Choosing Promise.

Lasso’s academic credentials include a master’s degree in public administration from Montana State University and a bachelor’s degree in business administration from the University of Wyoming.
**Prita Patel**  
**American University**

Prita Patel serves as the vice provost for academic administration at American University, where she has worked since 2014. In this role, Patel oversees the development, implementation, and evaluation of the academic affairs revenue and expense budget, inclusive of seven schools and colleges and various administrative units. As the lead financial officer reporting to the provost, Patel guides the preparation of resource allocation proposals and assesses the viability of new programs in close partnership with the university’s finance office. She also supervises the office of the university registrar and the university’s student services call center. As a member of the enterprise resource planning steering committee, Patel is the functional lead for academic affairs for American University’s current implementation of Workday.

She collaborates with leaders across the university through service on the university’s budget committee, deans’ council, benefits committee, strategic plan implementation committee, and space planning and management committee. In addition to financial management, Patel has responsibility for administering academic partnerships and contracts, enhancing operational processes, and providing budget transparency to the university community.

Prior to joining American University, she served as the senior director of finance, budget and risk management at Columbia University Irving Medical Center in Women’s and Children’s Health. Earlier in her career, she worked at Morgan Stanley in the healthcare equity research division. Patel earned a B.S. in finance and marketing from New York University’s Stern School of Business and an M.Sc. in international health management from the Imperial College Business School (London, England).

**Garth Perry**  
**University of Arizona**

Garth Perry joined the University of Arizona’s Office of Budget and Planning April of 2014 and was appointed vice president and chief budget officer in September 2020. In his current role, he is responsible for managing and reporting on the university’s approximately $2.3 billion operating and capital budgets, and for providing strategic decision-support to executive leadership. Perry previously served the Office of Budget and Planning as assistant director and has been in successive fiscal leadership roles in the Arizona Research Laboratories and University Animal Care as well as within the UA Bookstores, having been with the university since March of 2004.

Perry received his bachelor’s degree in history and sociology from Loyola University New Orleans and his master’s in accountancy from the Eller College of Management. He is also a certified public accountant. Perry has gained a reputation for being unflappably compassionate, always seeking to understand and include diverse perspectives. He is known for his commitment to a culture of continued growth, both for himself and his colleagues, as the team in the Office of Budget and Planning explores new, innovative ways to support the university community.
Shyree Sanan
Northern Illinois University

Shyree Sanan is associate vice president of finance and treasury at Northern Illinois University (NIU), where she has served in various administrative roles since 2001. In her current role, she reports directly to the vice president for administration and finance and chief financial officer and leads a team of approximately 65 employees setting strategic direction for financial operations of the university including accounting, accounts payable, procurement and contract management, commercial card program, treasury operations, debt management, tax compliance, financial reporting, bursar, accounts receivable, and PeopleSoft financial systems.

Sanan has previously served as controller, assistant to the vice president for research and treasurer of the Research Foundation, business manager for research and graduate studies, and accountant for student government. She has also distinguished herself as an influential leader and problem solver on her campus. She successfully restructured the university’s debt portfolio leading a finance team through two tax-exempt bond refinancings and facility acquisitions resulting in over $100M in true interest savings. Under her leadership and guidance, the university’s credit rating and outlook was upgraded for the first time in over 20 years, and internal controls over financial reporting were strengthened eliminating a nine-year repeat audit finding. Sanan also enhanced management reporting to the NIU Board of Trustees providing transparent and timely financial information for effective governance and decision making. She is committed to student success and serves as an adjunct faculty member teaching financial accounting courses and mentoring students.

Sanan earned her Master of Business Administration and her Bachelor of Science in accountancy from Northern Illinois University and is a certified public accountant. She enjoys travelling abroad to experience diverse cultures and meet new people.

Derrick Sawyer
Community College of Philadelphia

Derrick Sawyer II serves as the associate vice president of budgets and business services at the Community College of Philadelphia. Sawyer is responsible for developing, implementing, and evaluating the college’s operating and capital budgets. He serves as the college’s risk manager and is responsible for procuring appropriate insurance policies. Sawyer is also responsible for the college’s auxiliary services (food service, parking, bookstore, and campus card operations). He works cross-functionally with various leaders across the college, including senior leadership team members, on planning, operations, and strategic initiatives.

In addition to NACUBO, Sawyer is a member of multiple community and professional organizations, including the University Risk Management and Insurance Association (URMIA), National Association of College Auxiliary Services (NACAS), and Kappa Alpha Psi Fraternity, Incorporated. Sawyer also serves as a peer evaluator for the Middle States Commission on Higher Education (MSCHE). Sawyer earned his bachelor’s degree in business administration from Delaware State University and a master’s in human resource management from Temple University.
Brian Swanson
University of Minnesota

Brian Swanson is the assistant vice president/chief financial manager for university services at the University of Minnesota. In this role he leads a team responsible for supporting eight major system-level operating units (Facilities Management, Capital Project Management, Planning, Space, and Real Estate, Management Services, University Health and Safety, Public Safety, Auxiliary Services and the Office of Human Resources) with an annual operating budget of about $435 million and a $1.5 billion capital program.

His team of about 110 people provides integrated support in the areas of finance, information technology, enterprise facilities information services, project management and continuous improvement, and capital budgeting. In this role, Swanson serves as a member of the University Services leadership team, as well as treasurer for the University District Alliance (neighborhood and business association) and three university-owned LLCs that operate student housing, hotel, and restaurant properties.

Prior to his current role, Swanson worked in the university’s Office of Budget and Finance, and as a campus planner. He is a graduate of the University of Minnesota with degrees in industrial engineering, urban planning, and geography.

Orley Wainberg
Kean University

Orley Wainberg is the assistant vice president for business affairs at Kean University, a public university in New Jersey, designated in 2021 as the state’s first urban research university. In her role, she is the principal support to the strategic business of the chief financial officer, oversees student financial services and is responsible for the development of campus auxiliary operations. As a financial professional with over two decades of experience in the higher education sector, Wainberg has a rich history of leadership and collaboration and has spearheaded several strategic initiatives aimed at revenue generation, expense reduction, advancing technological systems and student success and retention. She has employed best practices for student-centric financial policies as well as championed data-driven decision-making processes to seek out efficiencies and streamline operations.

In a leadership capacity, Wainberg has served as vice president of the New Jersey Bursar’s Association and co-chair of the Middle States Commission on Higher Education (MSCHE) Self-Study for Standard VI, Planning, Resources, and Institutional Improvement, where she guided a team through a comprehensive self-study process in these areas, culminating in a successful accreditation review. She has also served on the New Jersey Advisory Committee on Student Aid (NJACSA), contributing to the development of statewide financial aid policies. Currently she is the goal leader in the President’s Sustainability Task Force and co-chair in the Graduate Committee for Strategic Enrollment Planning, among other roles.

Wainberg holds a Master of Science in accounting from Kean University and a Bachelor of Science in information science, sociology, and anthropology from Bar-Ilan University in Tel-Aviv, Israel.
Olga Weider
University of Florida

Olga Weider is the first female assistant vice president and university controller, leading the University of Florida (UF), an academic powerhouse in research, innovation, and educational excellence. UF is one of the top-five public research universities in the nation, serves over 61,000 students, and employs over 32,000 staff and faculty.

In her role, Weider provides leadership, policy formulation, performance measurement, and strategic direction for the advancement of UF Enterprise vision. She oversees a division of approximately 150 employees, which encompasses a broad range of critical functions, including payroll, financial reporting and general accounting, banking/merchant services, bursar, disbursements, travel, asset management, cost analysis, and tax services.

During her time at UF, Weider has led several enterprise-wide projects focused on the transformation and modernization of systems and processes, including the implementation of UF GO, a new travel and expense system. Weider currently serves as the chair for the Empowering UF initiative to modernize UF’s business processes and administrative information systems across the enterprise, with an emphasis on user experience and enhanced capabilities.

Weider joined the University of Florida in 2017 with extensive and wide-ranging previous experience as a controller, a certified internal auditor, and a certified public accountant. Weider’s previous experience as a controller at Zoo Tampa and in public accounting concentrated on governmental, not-for-profit, and healthcare sectors.

Weider holds a bachelor’s degree in accounting from the University of South Florida, and an M.B.A. from Louisiana State University. She is Lean Certified. In her free time, she is travelling, perusing books for the next best read, or cheering her son on the tennis court.

About the NACUBO Fellows Program

Launched in 2016, the NACUBO Fellows Program is a one-year leadership development program designed to provide support, education, and learning opportunities to individuals who seek a chief business officer position for their next role.

Through access to experienced chief business officers, presidents, provosts, NACUBO experts, and other higher education leaders, the Fellows Program provides participants with the opportunity to:

• Develop an understanding of the complexities of the chief business officer role
• Gain broad exposure to the field of higher education
• Understand the key competencies that are required for high performance as a chief business officer
• Enhance management, leadership, and communications skills
• Learn how veteran chief business officers have addressed institutional and professional challenges
• Build a network of colleagues who serve as a resource of support throughout the fellow’s career

Learn more at nacubo.org.