



## JOHN VITALI, PRINCIPAL

*Daval Consulting, LLC*

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### Professional References

#### Karen Backus

Ms. Backus is Principal and Co-Founder of **U3 Advisors**, which has helped institutions evaluate, transact, and develop over \$2B of real estate projects that support education, enterprise, and authentic experience. Through creative and thoughtful real estate strategies that combine institutional objectives and community aspirations, U3 has delivered projects with transformative impact. During my time at **Brooklyn Public Library**, University of the Sciences in Philadelphia, and Drew University I worked closely with Ms. Backus and her team on several transformational real estate strategic planning and development projects.

#### Carrie Collins, JD, PhD

Dr. Collins was the Vice President for Institutional Advancement at University of the Sciences. For over two years we were peers and served together on the President's Cabinet. Dr. Collins is now the Chief Advancement and Strategic Planning Officer at the **Philadelphia College of Osteopathic Medicine**. Founded in 1899, PCOM is a fully accredited multi-site institution of higher education offering a variety of degrees in medicine, health, and behavioral sciences.

#### Chris Darrell

Mr. Darrell was the outsourced interim Chief Information Officer at Drew University during most of my time there. Since Information Technology was part of my senior management portfolio, he directly reported to me. Mr. Darrell and I worked closely on several successful

### Summary

Daval Consulting provides services to colleges, universities, and nonprofit organizations focusing on interim executive leadership and strengthening their financial and business operations in support of institutional mission. From serving as an interim CEO/ED or CFO to diagnosing and remediating a particular operational issue, Daval tailors the scope of its services to each client's unique needs.

The firm's main services include interim executive leadership as a CEO, Executive Director, CFO, or Vice President for Finance and Administration; business diagnostics and re-engineering; and high impact, high profile project management.

John Vitali, Principal at Daval Consulting, is a seasoned and accomplished financial and operational leader in the nonprofit and higher education sectors, with the last twenty-one years in senior executive positions at large, complex organizations.

John excels at advancing an organization's mission through collaborative team building and data-driven strategic business modeling, helping to build greater financial sustainability in a high-performance culture.

John successfully collaborates with colleagues at all levels – from trustees and faculty to staff, managers, external partners, and consumers.

One hallmark of his leadership style is a strong commitment to diversity while he cultivates future organizational leaders through mentoring, delegating, and promoting.

His work will advance an organization's mission by partnering to envision, shape, promote, and implement new and better ways of operating.

In addition, during his career John cultivated professional relationships with a wide range of operational, technical, and systems experts. For appropriate projects, he can leverage this expertise on an organization's behalf.

See below for:

- Professional Affiliations via Daval Consulting, LLC
- Work Experience
- Project Portfolio of Successes
- Thinking and Leadership Profile
- Education
- Other Professional Affiliations

(December 2024)

### PROFESSIONAL AFFILIATIONS Via Daval Consulting, LLC

**NJ Center for Nonprofits**, Associate Member. This membership, advocacy, and educational organization exists to support the many 501(c)(3) organizations throughout NJ.

**Support Center for Nonprofit Management, Organizational Navigator**. The Support Center's Organizational Navigator program pairs organizations with an experienced nonprofit leader to support long-term change. Navigators are long-standing nonprofit leaders (average experience of over 30 years) who serve as organizational coaches.

- April 2023 - May 2024, worked as an organizational coach with Board members and leadership teams of two NJ nonprofits – one as an educational and social services start-up and the other on a major capital construction and fundraising project for a prominent food bank.
- September 2024 - Present, coaching a newly hired senior staff member at this same food bank as he transitions from a military/law enforcement background to a nonprofit culture of service and consensus-building.
- September 2024 - Present, working with an established NJ nonprofit combating homelessness on a strategic capacity-building program for the organization.

Support Center, **Interim Executive Director Program**. Accredited by the Center for placement as an interim ED for nonprofit organizations in executive transition. In this role John can work as an experienced partner with the Board of Trustees by offering an independent, fresh, and candid perspective; helping the staff adjust to the transition; providing organizational stability of continuous management; and, if requested, conduct an organizational diagnostics program for the Board.

- December 2023 - June 2024, interim Executive Director for the **Society for Classical Studies** at New York University; New York, NY. Provided daily executive leadership for programs and operations while conducting an organizational diagnostics review for the Board. This analysis led to the identification and remediation of several operational issues in the finance, technology, and staffing areas.

**Freelancers Union**, Member. Since 1995, Freelancers' Union has been on a mission to advocate for and support independent workers.

campus-wide projects including the installation of a 10G fiber network, a Wi-Fi system upgrade, upgrading the security camera system, and installing a new VOIP phone system. He is a Partner and Member at **Fortum Partners**, a leading international technology executive leadership placement and consulting company.

### Lucie Lapovsky, PhD

Dr. Lapovsky is Principal at **Lapovsky Consulting**, an educational consulting firm specializing in: Searches for chief financial and administrative officers; working with governing boards and senior staff to increase effectiveness; and solving strategic financial problems. In her role as a search consultant for CFOs and senior administrative officers, Dr. Lapovsky recruited me for my positions at University of the Sciences in Philadelphia and at Drew University. Since then, she has remained a close advisor for my work and career.

### Dionne Mack

Ms. Mack worked at Brooklyn Public Library for about fifteen years. During that time, she worked her way up the ranks from running a neighborhood branch library, serving as Director of the main Central Library, and then serving as Executive Director of the BPL's 60-branch system – the fifth largest public library system in the US. While Director and Executive Director Ms. Mack was respectively my peer and my supervisor. After leaving BPL she became the Director of the El Paso Public Library in Texas. She is now the **Deputy City Manager** for the City of El Paso.

### Siobhan A. Reardon

Ms. Reardon was a long-time employee of the Brooklyn Public Library. While Deputy Executive Director and COO she hired me in 2000 as Director of Finance. For about seven years, until she moved on in her career, I directly reported to Ms. Reardon. She is the former President and Director of the Free Library of Philadelphia, the 13th largest library system in the United States. Siobhan has transitioned to her own consulting practice which supports non-profit organizations in attaining and sustaining organizational success. She also serves as the Auerbach-Berger Senior Fellow at **Campaign for Grade-Level Reading** in Philadelphia.

### Jonathan Reader, PhD

Dr. Reader is the **Baker Professor of Sociology** and has been teaching at Drew since 1980. During my tenure at Drew as its CFO and Vice President for Finance

## WORK EXPERIENCE

2022

Daval Consulting, LLC

**Advancing the missions of higher education and nonprofit organizations by partnering to envision, shape, promote, and implement new and better ways of operating.**

For more information, please visit [davalconsulting.com](http://davalconsulting.com)

2016 - 2021

CFO and Executive Vice President for Finance and Administration

[Drew University](http://Drew University)

**Drew University**, Madison, NJ, Mid-June 2016 to June 2021

**CFO and Executive Vice President for Finance and Administration**, July 2018 – June 2021

**CFO and Vice President for Finance and Administration**, Mid-June 2016 – June 2018

### About Drew University

Established in 1867 by the Methodist Episcopal Church as its first US national seminary, Drew University is a private, not-for-profit Phi Beta Kappa liberal arts university. It includes the College of Liberal Arts, the Drew Theological School, and the Caspersen School of Graduate Studies. This distinctive cluster of schools – a classic liberal arts college, a humanities-centered graduate school, and a theology school with Methodist roots and ecumenical concerns – offers unusual opportunities to pursue knowledge across the conventional boundaries of the academy. The Theological and Caspersen Schools offer MA and PhD degrees and the College confers BA degrees in 50 disciplines. Drew is located on a **186-acre campus**, with 1 million gross square feet across 56 buildings. It has a total enrollment of about 2,000 students and has 135 full-time faculty members, 99% of whom hold the terminal degree in their field. The University is home to the independent Shakespeare Theatre of NJ; the Center on Religion, Culture, and Conflict; the Center for Holocaust/Genocide Study; and the United Methodist Archives and History Center.

### Leadership Portfolio

Reporting to the President and then Interim President (from August 2020), responsible for departments of Auxiliary Services, Conferences, and Events; Budgeting; Facilities and Campus Operations/Environmental Health and Safety; Finance/Controller (General Accounting, Bursar, and Purchasing); Human Resources; Information Technology; and Risk Management and Insurance. Oversaw \$86 million institutional operating budget, investment management for a \$170 million endowment through an outsourced Chief Investment Office (CIO), and a \$193 million pension fund. Was the lead staff support for Board committees for Audit, Buildings and Grounds, Finance, and Investments.

### Accomplishments

Significant contributor to a comprehensive multi-year restructuring of mostly non-instructional operations with the goal of sustainably reducing the University's budgeted expenses, while significantly investing in new student recruitment and student retention. Examples of actions taken include:

- Staffing reorganizations and downsizings.
- Identifying and eliminating expensive and low reward non-instructional programs and operations that are no longer mission critical.
- Right sizing the capital budget.
- Restructuring employees' benefits program.
- Pursuing the monetization of non-core university-owned real estate.
- Identifying core operating functions eligible for outsourcing to third-party service providers.
- Seeking to establish expense-sharing relationships with local institutions.

Introduced the University's first multi-year cash forecast that was fully reconciled with a multi-year GAAP-compliant operating budget.

Successfully restructured \$54 million in bond debt. Resulted in a \$17 million cash improvement over 5 years.

and Administration I worked with Dr. Reader on several finance and budgeting committees.

### Marvin Samson

Mr. Samson is the founder and Chief Executive Officer of **Samson Medical Technologies**, L.L.C., a company specializing in injectable drug delivery systems and programs for hospital and alternate site pharmacists. He was Chair of the Board of Trustees at University of the Sciences and was its Interim President for the 2011-12 academic year. As the CFO at USciences I worked closely with Mr. Samson, particularly when he was Interim President.

### Doug Schoenberger

Mr. Schoenberger is the Government Affairs Specialist at the **NJ Center for Nonprofits**, since 1982 a state-wide umbrella organization for all NJ charities regardless of size, geography, or mission and focused on advocacy, education, capacity-building programs, and membership services. Mr. Schoenberger and I are colleagues at the Support Center for Nonprofit Management's Organizational Navigator Program.

### Marti Winer, MBA

Ms. Winer was the President's Chief of Staff and Vice President for University Relations at Drew University for much of my time there. We closely collaborated on a wide range of institutional projects and strategic planning initiatives for the University. Having spent several years as Vice President at MGM Resorts Event Productions, Ms. Winer is now Vice President of Event Productions at **Casa Bonita** in Lakewood, CO.

## Skills

### The Source for These Comments

The source for these comments is an independent assessment of John done by Korn Ferry. That full report is available at the bottom of this CV.

### Leadership and Thinking Styles

John's primary **leadership** style is "social;" meaning he has a quick, friendly, and agreeable style. His primary **thinking** style is "creative;" that is, he has an analytic and exploratory style. When people first meet John, they likely see him as quick and agreeable – open to input and willing to shift direction quickly as conditions change. As people get to know John, they increasingly see that he is quite analytical and exploratory in his

A major strategic and tactical contributor to the University's 2018 tuition price resetting, resulting in a Board-approved gross tuition reduction of about \$10,000.

Led a major program of physical plant and technological infrastructure renewal for Drew's 1+ million gross square foot campus, including a five-year deferred maintenance reduction initiative, upgrades to residence halls and instructional space, infrastructure improvements, and a real estate master plan for the management and monetization of non-core and undeveloped University properties.

Resuscitated a dormant Enterprise Risk Management Program with an updated institutional risk inventory, a significant risk matrix, and associated risk mitigation plans with plan owners. The Program was regularly monitored by a high-level University oversight committee and the Board's Audit Committee.

With the advice and support of the Board's Audit Committee retained the University's first internal audit firm to assist with strengthening internal controls, identifying operational inefficiencies, and supporting the Enterprise Risk Management Program.

Successfully negotiated a banking agreement for the University's purchasing and travel credit card program. Significantly reduced the number of card holders while strengthening associated internal controls via online banking technology.

During the COVID-19 crisis, led a team that successfully obtained a \$7 million loan from the federal Small Business Administration's Payroll Protection Program. That work included convincing the SBA to forgive the University's repayment of the entire \$7 million.

## 2013 - 2016 CFO and Vice President for Finance and Administration University of the Sciences in Philadelphia

### About USciences:

(In June 2022 USciences **merged** with St. Joseph's University. The "University City" campus identified on the SJU web site is the former USciences campus.)

A private, not-for-profit coeducational institution distinguished as North America's first college of pharmacy founded in 1821. Over fifty academic programs are offered through four colleges: pharmacy; health sciences; arts and sciences; and healthcare business and policy. The University's then 2,000 undergraduate and graduate students are supported by over 170 full-time faculty on a **36-acre campus** with high quality instructional, research, and student life facilities.

### Leadership Portfolio

Reporting to the President (and then interim President), was responsible for departments of Finance, Operating and Capital Budgeting, Human Resources, Facilities, Public Safety, Legal Services and Risk Management, and Auxiliary Services. Oversaw a \$100 million operating budget, investment management for a \$210 million endowment through an outsourced CIO, and a \$110 million pension fund. Staff support to Board committees for Audit, Finance, Facilities, and Investments.

### Accomplishments

Conceived, organized, trained, and led two inaugural standing tri-partite University committees that were chiefly faculty-driven. One committee addressed the operating budget and the other dealt with the capital budget and facilities oversight. These two teams strengthened University governance, financial and physical plant literacy, and institutional transparency.

Led a 16-month campus facilities master planning process that gave the University a realistic and affordable 10-year plan to significantly improve student housing via off-balance sheet financing; add new learning, research, and sports facilities; repurpose other buildings to provide more instructional, research, and student activity space while eliminating expensive property leases; use existing instructional space more efficiently; and further beautify the campus and its adjacent neighborhood. Directed by the University Board in May 2015 to begin implementing the master plan in phases with Phase 1 focused on the design and construction of a **416-bed student residence hall**.



thinking; that he is willing to consider many points of view; partial to solutions that address multiple issues; and cooperatively open to input and change. John works best in situations that require patiently interacting with people about issues that are complex and which involve many different points of view that often change. He is a creative, analytical thinker who enjoys work that requires planning and thinking matters through to assure that exact requirements are achieved.

## Decisiveness and Work-Life Balance

John is a decisive leader who prefers prudently doing over thinking about a situation. He is willing to make decisions, does not become overwhelmed when action is needed, and is action-oriented. John balances his work priorities with his personal life so that neither is neglected. He behaves in ways that suggest there is more to life than having a career. John participates in activities outside of work; he works hard, but not at the expense of his family and personal life; and he is not a workaholic.

## Managing Change

John contributes to the leadership of his organization by understanding the dynamics of change. He possesses the skills to inspire and motivate performance that positively leverages change. John routinely involves his staff in planning, decision-making and implementing change initiatives. He works to overcome resistance to change by regularly sharing information and providing frequent opportunities for genuine discussion.

## Inspiring Commitment

John fosters loyalty and commitment from his staff by recognizing and rewarding his team; sharing a clear vision and connecting it to each person's role; expecting high standards from everyone; and by recognizing, rewarding and celebrating successes.

## Strategic Planning

John can convert a big, long-term vision into a tangible business strategy. He easily contributes to creating a strong vision that can lead an organization toward a positive future. He shares that vision with staff, clearly saying where the organization is going and how it plans to get there. John involves seasoned and up-and-coming staff in planning to gain a variety of perspectives and foster buy-in across the organization.

Supported the interim President as the lead planner and implementer of a board-approved multi-year strategic turnaround plan that included stabilizing the senior management team, expanding the enrollment function, an academic and administrative program review, an institutional re-branding effort, and a major capital fundraising campaign.

Navigated the University through the refinancing of \$90 million in bond debt, saving \$7.2 million. Successfully sustained the institution's A- and A3, stable credit ratings with Fitch and Moody's.

Converted traditional "bricks & mortar" bookstore to an online system. Former bookstore space converted to a high-quality convenience store for the campus and surrounding neighborhood.

Successfully re-negotiated a 10-year \$30 million contract with an international dining services provider. Strengthened terms of the contract to better protect the University's interests and raised the annual commission rate paid to the institution from 4% to 9%.

## 2000 - 2013 CFO and Executive Vice President for Finance and Administration

### Brooklyn Public Library

#### About Brooklyn Public Library

Annually serving over 1 million customers, this premier 100+ year old independent 501(c) 3 urban public library system was the fifth largest in the US and the ninth largest nonprofit cultural organization in NY City. The BPL system includes a **Borough-wide campus** of 58 neighborhood libraries, a business library, and its flagship Central Library. It had an operating budget of \$100 million, a \$62+ million capital budget, a staff of 1,400 full- and part-time employees in a unionized environment, and 1,500 volunteers. Among the largest education organizations in Brooklyn, at the time the Library annually delivered high quality adult literacy and life-long learning programs to 40,000 people.

**Executive Vice President for Finance and Administration and CFO**, 2005 to June 2013

**Deputy Director for Finance and Administration**, 2002 to 2005

**Director of Finance**, 2000 to 2002

Reporting to the Executive Director and then the President/CEO, since 2002 had enterprise-wide responsibility for Division of Finance and Administration, including Capital Planning and Facilities Management, Finance, General Counsel, Human Resources, Information Technology, and Public Safety. Led a staff of 250+ through six direct reports.

Executive staff support for four Board committees including preparation of agendas, support for trustee chairs, and preparation and presentation of materials. Committees included Audit, Capital Planning and Facilities, Finance, and Investments.

#### Financial Leadership

Fiscal management resulted in thirteen consecutive years of unqualified opinions from independent auditors with only minor management letter issues.

Introduced organization's first GAAP-compliant monthly and quarterly financial reporting packages and an enterprise-wide rolling budget planning and management model. Led to a more collaborative, accountable, and transparent budget process.

Through strategic cash budgeting and stronger internal controls moved organization in two years from a serious cash deficit to sustained positive cash flow.

Restructured long-term investments, which grew over 10 years from \$15 million to \$34 million. Represented the trustees' investment committee in routine interactions with investment advisors.

Established a durable culture of financial transparency and accountability via 100% compliance with select board-approved voluntary **Sarbanes-Oxley program**.

#### Operational Leadership

## Leading People

John effectively directs and motivates people by delegating well, treating people fairly, providing development opportunities for staff, recruiting and mentoring talented people, and fostering an open and honest environment where exchanging ideas and constructive feedback can routinely occur. He has recruited and lead well-rounded management teams.

Led cross-functional teams that conceived, promoted and implemented innovative, sustainable enterprise-wide improvements that were game-changing, leading to service and business models that were more entrepreneurial, integrated, reliable, efficient and economical.

Examples --

- A multi-award-winning reservation and print management system for 1100 public computers and 300 printers using 65 touch-screen self-service transactional kiosks with integrated library and "smart debit card" technology. Repurposed nearly \$2 million in supplies and highly trained professional labor to the delivery of core services and programs. Led to a new annual revenue stream of \$300,000 and stronger internal controls through cash-less operations at all sites.
- A distinctive service relationship with United Parcel Service to fully support a 60-site intra-library delivery service. Cut the book-to-customer delivery cycle from seven business days to 24 hours, while annually moving over five million books and other library materials. Introduced real-time tracking technology for all deliveries. Eliminated escalating in-house fleet costs, substantially reduced financial risk, and afforded significant release time for professional staff to grow core programs and services.
- Led a cross-functional team of City officials, Library staff, and outside consultants to implement a self-funding strategic real estate master plan for BPL's 58 neighborhood libraries. Plan endorsed by NY City as an innovative, cost-effective approach to mixed-use developments for new libraries with luxury and market-rate housing. Library announced its **first successful developer partnership** leading to a new condo high rise with a new replacement library at street-level and a \$40 million unrestricted allocation to the Library's capital renewal budget.
- Introduced a **passport service** sanctioned by the US State Department that within two years was then annually grossing \$500,000 and a net profit of \$375,000. Due to the inaugural site's success, a second site was opened in another section of Brooklyn.

## 1976 - 2000 Multiple Management and Executive Leadership Roles Higher Education and Nonprofit Organizations

During this period John held several increasingly responsible finance and administration leadership positions, including at the Vice Presidential/CFO level, at nonprofit organizations and at colleges and universities in the NY Metro Area.

## PROJECT PORTFOLIO of SUCCESSES

Shown here are representative examples of John's work.

## Strategic and Tactical Financial and Operational Leadership

During his extended career as a nonprofit and higher education business leader and partner, John Vitali routinely oversaw multi-million-dollar institutional operating and capital budgets; finance operations, including General Accounting, Bursar, and Purchasing; and the investment management of large endowments and pension funds through outsourced Chief Investment Officers and other third-party experts.



Strategic and Tactical Finan...

## Campus Real Estate and Capital Infrastructure Improvements at Drew University

A broad portfolio of real estate and capital infrastructure improvement projects ranging from the monetization of assorted non-core housing properties and a thoughtful, yet purposeful discussion about property development through a public-private partnership to the installation of new instructional spaces and plant infrastructure improvements.



Campus Real Estate and Ca...

## Campus Master Plan at University of the Sciences

From January 2014 through May 2015 John led the campus master plan development process at University of the Sciences. At the University's May 2015 board meeting the trustees approved a phased implementation of the updated plan starting with a student residence hall for 400+ students. That res hall is now fully in use.

Here are two slide presentations. The first, on the left, shows the planning process and its results. The second, on the right, shows final design, programming, and facility locations after new property was acquired. **Please click on each photo and allow time for the file to open.**



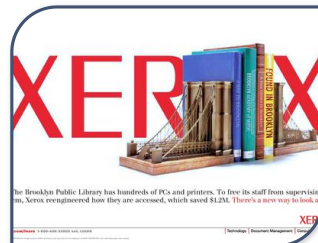
Campus Master Plan - Origin...



Campus Master Plan - Update

## XEROX Technology Project at Brooklyn Public Library

A multi-award-winning reservation and print management system for now 1100 public PCs and 300 printers using 65 touch-screen self-service transactional kiosks with integrated library and "smart debit card" technology. Repurposed nearly \$2 million in supplies and highly trained professional labor to the delivery of core services and programs. Led to improved customer service, a new annual revenue stream of \$370,000 and stronger internal controls through cash-less operations at all sites.



XEROX Project at BPL

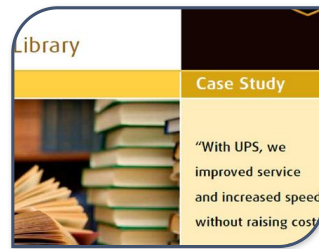


Microsoft Case Study for Xe...

## UPS "Supply Chain" Project at Brooklyn Public Library

A distinctive service relationship with United Parcel Service to fully support a 60-site intra-library delivery service. Cut the book-to-customer delivery cycle from seven business days to 24 hours, while annually moving over five million books and other library materials. Introduced real-time tracking technology for all deliveries. Eliminated escalating in-house fleet costs,

substantively reduced financial risk, and afforded significant release time for professional staff to grow core programs and services.



UPS Project at BPL

## Capital Projects at Brooklyn Public Library

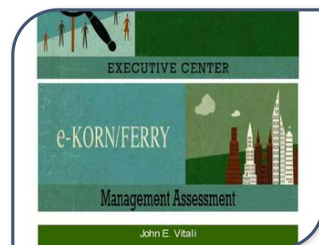
While at BPL, John Vitali was responsible for supervising several multi-million-dollar capital construction and renovation projects. Samples of those projects are illustrated here.



Sample Capital Projects

## THINKING AND LEADERSHIP PROFILE

An independent [Korn-Ferry](#) assessment of John Vitali's thinking and leadership styles, showing how John behaves most naturally without giving much thought to the image he is projecting to other people and how he makes decisions when interacting with other people. John acknowledges that this report is dated; however, he believes it remains an insightful picture of the thinking and leadership styles he has demonstrated throughout his career.



Thinking and Leadership Pro...

## EDUCATION

- |      |  |
|------|--|
| 1986 | M. Ed.<br>Rutgers University<br>Higher Education Administration  |
| 1974 | B.A.<br>Saint Peter's College (now University)<br>History with a concentration in Russian Area Studies |

## OTHER PROFESSIONAL AFFILIATIONS

[Financial Executives Networking Group](#), Member since 1999. Founded in 1991 The FENG is an internationally recognized organization for senior financial professionals with over 50,000 worldwide members. Membership is by invitation.

[Endowment Trustee, American Library Association](#), 2007 -- 2012. This 5-member group is appointed by the Association's national Executive Board. It serves as the ALA's investment committee for its then nearly \$35 million long-term investment portfolio. Appointed Senior Trustee (Chair) by the ALA Board in June 2012.

Edison Township Free Public Library System's Board of Trustees, Member 2008 -- 2013. Nominated by the Mayor and confirmed by the Township Council, this board has full fiduciary responsibility for the library system's operations, programs and services.