

Budget & Finance Team Bios ^[1]

Chad Marturano ^[2], Acting Chief Financial Officer

Chad has served as Acting Chief Financial Officer at the University of Colorado System since July 1, 2021. Chad's "Acting" position is a result of the Board of Regent's appointment of incumbent CFO Todd Saliman, to serve as Interim President while the board conducts its national search for the university's next President. Prior to this, Chad held the position of Senior Associate Vice President and Deputy Chief Financial Officer. Chad joined the University of Colorado System in 2014 and has held various budget and finance roles during his time at the university.

Chad has nearly 15 years of experience in budgeting and public policy, with close involvement in K-12 and Higher Education funding issues in Colorado. In his current position, Chad is part of the President's leadership team and plays a key role in developing CU's annual budget, working closely with CU campus CFOs and finance teams, Colorado Department of Higher Education (CDHE) staff, and other state agency staff on issues pertaining to higher education policy and funding. He oversees CU's business operations units including the Procurement Service Center, Risk Management, and the Controller's Office as well as institutional research, capital construction, real-estate, and fiscal analyses within the budget and finance unit. Additionally, Chad represents CU as a lobbyist on capital construction matters before the Capital Development Committee at the state legislature and works closely with CU's government relations team.

Between 2010 and 2014, Chad served as Director of Legislative Affairs for the CDHE and Colorado Commission on Higher Education (CCHE). Chad served in Gov. Bill Ritter's Office of State Planning and Budgeting amidst the great recession and also worked in the Public School Finance Unit at the Colorado Department of Education. Before joining state government, Chad worked at Pacey

Economics, a private economic and litigation consulting firm in Boulder, Colorado.

From July 2017 to July 2019 Chad served as the Institutional Finance Advisory member to the CCHE where he represented CFOs from all the public institutions of higher education in the state. Chad also volunteers and served as Chair of the Superintendent's Budget Taskforce for the Cherry Creek School District between August 2019 and July 2020.

Chad holds a Master's degree in political science with an emphasis on public policy from the University of Colorado Denver and a Bachelor's degree in economics from Colorado State University. Chad is a Colorado native and lives in the Denver metro area with his wife, Laura and their three young children.

Tony Vu ^[4], Treasurer, Chief Investment Officer and Associate Vice President for Budget and Finance

The Board of Regents elected Tony to his position on December 16, 2020. He brought three decades of finance and treasury experience including service as Treasurer for the Miami-Dade County Public Schools (M-DCPS ^[5]) and University Treasurer at Florida International University (FIU ^[6]). M-DCPS is the fourth largest school district in the nation with 350,000 students. There, he managed banking, liquidity, a cash portfolio of up to \$2 billion and a debt program in excess of \$5 billion. He had similar responsibilities at FIU where he also enjoyed serving as an adjunct lecturer. He has volunteered in several roles, including the Miami-Dade County Asian American Advisory Board ^[7], FLCLASS ^[7] Board of Trustees, the GFOA's ^[8] Rethinking Budgeting Task Force, and as a speaker at NACUBO ^[9] and AFP ^[10] conventions.

At CU, Tony oversees the treasury team and its responsibility over the \$3 billion investment program, \$2 billion debt portfolio, and the liquidity and banking systems of the CU System. Treasury manages the Faculty Housing Assistance Program ^[11] which supports tenure and tenure track faculty with home ownership. The treasurer also serves as the co-fiduciary for the 51,000+ participants in the \$6 billion of retirement programs of the system.

Tony holds bachelor and master degrees in business administration, both from the University of Florida. He is a terribly inconsistent golfer but still enjoys it. He, his wife, Carolina, and two young children live in Denver.

Ed Mills ^[12], Associate Vice President & Chief Procurement Officer, Procurement Service Center

Ed Mills serves as the Associate Vice President & Chief Procurement Officer for the CU System Office. Ed has an extensive background in procurement, finance, and project management in both private and public sectors and has built and led several procurement service centers. Prior to joining CU, Ed's most recent achievements have been in the private aerospace industry. As Vice President for Procurement at Sierra Nevada Corporation (SNC), he directed tactical and strategic procurement, procurement technology, data analytics, compliance, and vendor management. He also launched supplier quality and supplier management and spearheaded SNC's drive to adopt data analytics dashboards. Ed and his team managed \$1B in annual spend (approximately the same amount as the University's spend through the PSC), including subcontracts, professional services, long-term agreements, information technology, travel, MRO (maintenance, repair, and operations), and capital purchases. Ed has a bachelor's degree in political science (Niagara University), an MBA (Simon School of Business, University of Rochester), and a Six Sigma Greenbelt certification (University of Michigan). He lives in Highlands Ranch and enjoys hiking, skiing, cooking, photography, and travel.

Terry Lee ^[13], Associate Vice President & Chief Risk Officer, Risk Management

Terry has over 30 years of experience in risk management, insurance, claims, and cost containment. He and his team are responsible for managing the risk-financing and claims administration of property, liability, and workers' compensation programs, including the insurance captive company, for the CU system. In addition, the team is responsible for working with the campuses to identify, assess, and manage the complex risk exposures and liabilities associated with a major research institution.

The program protects billions of dollars in assets.

Prior to working at CU, Terry's experience includes positions with Standard and Poor's corporation and Director with Blue Cross/Blue Shield providing risk management services to large employers including the University of Colorado. He has worked closely with the state legislature, agencies, lobbyists, and stakeholders on various insurance reform bills and policy matters pertaining to insurance. Governor Owens appointed Terry to the Colorado Insurance Board of Directors where he later joined the state working on regulatory policies and managed the insurance compliance program. He was President of the Public Risk Insurance Management Association, Colorado Hospital Association Risk Managers, and the Colorado Self-Insurers Association. Terry continues to be active in industry associations and he serves as an advisor, lecturer, and committee chair for the CU Denver Business School. He graduated from the University of Northern Colorado, lives in Parker with his wife Lisa, and they have three children currently attending Colorado universities.

Robert C. (Bob) Kuehler ^[14], Associate Vice President, University Controller

Bob has Accounting and Finance degrees from Texas Tech University and is a Certified Public Accountant (CPA) in the states of Colorado and Texas. He has been practicing accounting in the governmental sector for over 30 years. His public accounting experience spans 21 years, six of those as partner at KPMG LLP. During his tenure in public accounting, the majority of Bob's clients represented the public sector, such as higher education institutions and state and local governments. He also spent two years in KPMG's Office of Professional Practice in New York, focusing on technical inquiries from audit teams across the country related to higher education and other governmental and not-for-profit entities.

Bob has led a number of initiatives since joining CU in July 2009. Under his direction, the Office of University Controller: won national recognition for innovation in financial reporting; implemented a Continuing Professional Education program approved by NASBA (National Association of State Boards of Accountancy); created a digital design team that effectively uses multimedia to communicate policies and technical instructions to employees with fiscal responsibilities; spearheaded the upgrade to PeopleSoft Finance 9.2; and, significantly enhanced and expanded the University's

internal financial reporting tool. He is a frequent speaker on accounting developments and innovations in higher education reporting at both local and national forums. Bob is a member of the NACUBO (National Association of College and University Business Officers) Accounting Principles Committee. The Committee serves as a key interface between the Governmental Accounting Standards Board and higher education entities.

Bob is married and has three daughters.

Nora Sandoval ^[15], Assistant Vice President for System Administration Budget and Business Operations

Nora has worked for the University of Colorado System Administration Budget Office since 2007. As the Senior Director of Budget and Business Operations, Nora has overall responsibility for the business office team of System Administration. In her role, she manages and helps negotiate the ICCA budget requests, works with the Auxiliary departments to understand their business structure, and manages and monitors the restricted budgets to ensure compliance. Nora also manages the President Initiative fund requests as well as coordinates with Advancement on their budgets for the system and the campuses. Nora collaborates with the campus budget officers to ensure that they understand the System Administration budgets.

Before joining the University of Colorado, she served the Department of Human Services at Fort Logan Mental Health Hospital. Nora has a Bachelor's of Science in Accounting and will receive her Master's in Business Administration in the spring of 2019 from the University of Colorado. She is married and has four children.

Kori Donaldson ^[16], Senior Director, Capital Assets

Kori joined the University of Colorado System office in December 2019. She has more than 14 years of experience in budgeting, capital planning, and public policy. In her current role, Kori supports the CU System CFO and leadership on issues related to capital budgeting, financing, and planning.

From August 2007 to December 2019, Kori worked for Colorado Legislative Council, the nonpartisan policy and research agency for the Colorado General Assembly. In February 2009, Kori was appointed as the lead staff of the Capital Development Committee (CDC), a role she held until she left the agency to work at CU. In her role as lead staff of the CDC, Kori worked with every state agency and institution of higher education. She oversaw the analysis of all funding requests associated with capital construction projects, advised the committee about the capital process, and briefed the committee on policy issues of interest.

In addition to staffing the CDC, Kori staffed both the House and Senate Finance Committees, published memos and issue briefs on a wide variety of infrastructure and financing topics, and wrote fiscal notes on bills addressing issues such as state construction contracting, state procurement, and certificates of participation. She also served as a team lead, managed construction projects paid through the legislative budget in three different building, and wrote for the Blue Book.

Prior to her time at Colorado Legislative Council, Kori taught 6th grade in northern Colorado. She also helped develop a new literacy course for future teachers at Colorado State University and taught as adjunct faculty. Kori was born and raised in Colorado and enjoys reading, traveling, cooking, and gardening.

Celina Duran ^[17], Director, Financial Policy Analysis

Celina joined the University of Colorado in September 2015. She is responsible for collaborating with the campus budget directors on the University budget process. She provides support to the Budget and Finance office in the development of the annual budget, assists in preparing responses to internal and external constituent requests for finance related policy questions, and continually works to improve financial policy outcomes at the University. She comes from the Colorado Department of Higher Education (CDHE) where she worked on the budget team for nearly eight years specializing in financial aid policy and tuition classification. She has experience with state higher education finance policy, performance funding, and the statewide budget process. She has a Master's in Public

Administration from University of Colorado Denver.

Ryan Allred ^[18], Director, Institutional Research and Data Analysis

Ryan has more than 20 years of experience in information technology and has been working in higher education since 2004. In his current role, he provides data support, analysis, and visualizations to Budget and Finance, the Board of Regents, Academic Affairs and curates the website CU Data Made Simple. He coordinates with campus Institutional Research (IR) offices on system wide data collections and projects such as the CU Metrics. He is a member of the Colorado Department of Higher Education (CDHE) Data Advisory Group, who advise on issues related to statewide data collections, IPEDS, research projects, surveys and studies in support of institutional assessment, planning, decision-making and quality improvement.

Prior to joining the University of Colorado in December 2014, Ryan served the CDHE for over 10 years supporting student data collections, building business intelligence systems, providing data and information for legislative reports, policy analysis, and other inquiries. Ryan was the lead software developer for the Student Unit Record Data System (SURDS) that serves as the official source of data for public postsecondary education in Colorado. He architected student management and reporting systems for Colorado GEAR UP, a federally funded pre-collegiate program serving Colorado.

Ryan has also served as a software consultant for educational organizations, a web and database developer, an adjunct instructor, and attained the rank of Sergeant during his four years in the U.S. Marine Corps. Ryan has an undergraduate degree in Business Administration with a concentration in Information Systems from Campbell University and a Masters in Information Systems from the University of Colorado Denver. He lives south of Denver with his wife and two children.

Anna Aguirre ^[19], Senior Budget Analyst, System Administration Business Office

Anna has more than 20 years of experience in budgeting and fiscal analysis including 18 years working in higher education. In her current role, she provides budget support and analysis to Budget

and Finance and to the System departments. She also is responsible for the System budgets through review and reconciliation, the annual merit pool process, position budgeting, monitoring payroll, salary, and expense transactions, and generating reports and calculations. Prior to joining the University of Colorado, Anna was a Senior Budget Analyst at the Colorado School of Mines for 11 years supporting Administration in budget analysis, forecast analysis, and providing data and fiscal information. For seven years, Anna was a Budget Analyst at the University of Colorado at Denver. Anna is a CU alumna, receiving both her bachelor's degree and master's degree from the University of Colorado Denver.

Kelly Maden [20], Senior Finance Analyst, System Administration Business Office

Kelly assists System departments with their finance and procurement operations, including generating reports and advising on University policies. She also performs cost studies and accounting activities for System. Prior to joining the CU system administration team in 2017, Kelly worked at CU Anschutz Medical Campus for three years as a grants and contracts manager for the Department of Neurosurgery. Prior to moving to Colorado, Kelly worked for the federal government for six years with experience in project management, fiscal analysis, and procurement. Kelly has a Master's in Business Administration from Towson University/University of Baltimore and a certificate of Public Sector Financial Management from the University of Maryland. Her undergraduate degree is a B.S. in Business from Indiana University.

Emily Parker [21], Budget, Planning, and Policy Analyst

Emily works on policy and budget strategy for all four campuses of the University of Colorado. In this role, she works closely with the Colorado state government and other higher education institutions in the state by supporting the Budget and Finance office in the development of the annual budget, preparing responses to internal and external constituent requests for finance related policy questions, and working to improve financial policy outcomes at the University. Prior to starting with the University of Colorado, Emily served as a senior policy analyst at Education Commission of the States where she supported states on issues of school finance

across the entire P-20 continuum through expert testimony, funding formula construction, and education finance analysis. Emily also worked at the Brookings Institution in Washington, D.C. as a Senior Research Assistant and Project Coordinator for former Federal Reserve Board Chair Ben Bernanke. In graduate school, she worked at the Colorado Department of Higher Education and on the Emmy Award winning Truth Test Team at 9NEWS in Denver. When not working, Emily enjoys hosting pub trivia, attending Broadway musicals, and playing with her dachshund, Benny. Emily earned both her bachelor's degree and her Masters of Public Policy from the University of Denver and a certificate in Education Finance from Georgetown University.

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