



Jaime Ontiveros

DIRECTOR

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Jaime has partnered with over 35 universities and academic medical centers on matters related to resource management, financial analyses, funds flow analysis, budget redesign, and large-scale initiative implementations. He has experience in the development and implementation of policies and procedures, process mapping, efficiency enhancements, training, and compliance improvement. Additionally, Jaime has provided counsel on governance and financial planning to several university executives and has extensive experience working with provosts, academic deans, and department chairs.

PROFESSIONAL EXPERIENCE

Representative examples of Jaime's engagement experience include:

HIGHER EDUCATION

- + Partnered with more than 10 institutions ranging from \$350MM to \$3B in annual operating expenditures to assess resource allocation operations through detailed review of their respective funds flow and custom development of financial models that depict unit-level operating income statements to bring insight into inherent cost associated with revenue generation and to provide management with a data-informed decision making tool. These initiatives nearly always included training components for administrative leadership, academic leadership, and personnel with budgetary and financial responsibilities and consensus building components that engaged faculty, staff, senior leadership, and Board of Trustee stakeholders.
- + Led infrastructure development initiatives at seven (7) institutions that required ramping up administrative unit operations in anticipation of implementing a new incentive-based budget model. This ramp up included specific tasks such as creating recharge mechanisms to support administrative unit funding, educating administrative leadership on how to establish service level agreements, and conducting training sessions to shift administrative staff mindsets to become more service-oriented to academic stakeholder needs.
- + Provided guidance and assistance to develop comprehensive business plan consisting of an organizational and financial strategy for one of the nation's largest healthcare research institutions. Organizational component evaluated current stakeholder relationships and governing structures of other institutions across the U.S. to provide a recommendation on existing relationship with the office of the president. Financial strategy analysis included a base case, 10-year forecast, and an assessment and feasibility of growth opportunities for each primary revenue stream.
- + Served as an interim assistant contract officer by supporting the review and creation of subaward related agreements and being a key liaison between the office of sponsored programs, principal investigators, prime award sponsors, and contract office staff on more than 350 requests.

ACADEMIC MEDICAL CENTERS / HEALTHCARE

- + Led project management and analysis for a ~300 employee academic clinical enterprise transition from an academic medical center to a hospital organization to reduce a \$30MM structural deficit and realign strategic vision. Additional initiatives included designing new undergraduate medical education program, reorganizing basic sciences research infrastructure, developing new space plan, and developing new \$20MM hospital academic funds flow model for clinical departments.
- + Conducted academic medical center/healthcare funds flow assessments for enterprises ranging from \$1.3B to \$3.6B with efforts that included reconciling financial intersections (funds flows, commitments, balance sheet assets, and space costs), developing joint operating statements, and providing recommendations on how to strengthen clinical and academic partnerships. Engagement outcomes have included providing executive leadership and governing boards with increased transparency into each entity's financial interactions, creating additional resources for the academic enterprise, putting unused endowment and gift dollars to use, and creating business cases for realigning how financial resources are distributed and used.

- + Designed a regulatory tool for statewide department of health inspections for the conversion of physician to provider-base practices throughout the state. Performed site assessments and created detailed work plans for numerous groups including HR, pharmacy, facilities, etc. with results of more than \$27.0MM in net cost savings from 340B drug pricing and revenue enhancements.

GLOBAL HIGHER EDUCATION

- + Created transition plan for a \$21.3MM annual program to export supply chain management and financial operations knowledge and processes from a major Ivy League research institution to a Nigerian non-government organization.
- + Projected drug expenditures for antiretroviral treatment drugs, proposed budgets to program executive director and dean of the school of public health, and served as a reference for discussions on budget modifications for an active \$11.2MM program at a major Ivy League research institution after a detailed analysis of inventory levels, drug use, and spend for more than 50 individual sites and central medical stores in Africa.
- + Trained and supported a new supply chain manager at an Ivy League research institution with procurement of drugs, inventory gap analysis, reviewing of vendor contracts, and facilitation of treatment, operations, and planning committee meetings.
- + Developed a compilation of positions and revised all job descriptions for an international start-up graduate institution in the United Arab Emirates, researching similar positions at benchmark institutions and addressing position characteristics unique to region.

EDUCATION AND CERTIFICATIONS

- + Bachelor of Business Administration; Strategy, Operations & Management Sciences; University of Michigan
- + Fluency in Spanish

SPEAKING ENGAGEMENTS

- + American Association of State Colleges and Universities (AASCU), 2015 Academic Affairs Summer Meeting
- + National Association of College and University Business Officers (NACUBO), 2017 Planning and Budgeting Forum
- + Western University Financial Officers (WUFO), Western Universities Supply Management Association (WUSMA), and Western Association of Resource Planners (WARP), 2017 W3 Conference (Canada)