

## **GREG SCHMITZ, Ph.D.**

32045 Willow Ave New Hartford, IA 50660  
319-415-4835  
gregoryrschmitz@gmail.com

### **EXECUTIVE AND PROFESSIONAL EXPERIENCE**

#### **Vice-President, Eagle View Partners, Cedar Falls, Iowa**

**2018-Present**

Eagle View Partners (EVP) develops, acquires and operates real estate properties including commercial, residential, commercial, mixed, hotel and senior care.

#### **President, CVT Group, Cedar Falls, Iowa**

**2017-Present**

Creating Value Together (CVT) provides operational systems and services along with customized administrative support functions and facility expansion services to Senior Care providers in Long Term Care, Assisted Living, and Skilled Nursing facilities. Specific services include Administrator Support, Regulatory Compliance, Improving Quality and Five Star measures, Leadership Development, Software Solutions and Partnership Opportunities.

#### **The VGM Group; Waterloo, Iowa**

**2011-2016**

VGM is a member service organization providing operating services and support to nationwide networks of small business owners assisting them to successfully compete with larger publicly owned competitors in post-acute healthcare and hospitality sectors. Members choose from a broad range of services including insurance, technology, education and training, marketing and customer relations, financing, and purchasing programs.

#### President of VGM Education

##### Responsibilities:

- Member of Executive Team delivering service and support for 6,000+ member companies nationwide.
- Evaluate and support expansion opportunities to grow existing Divisions.
- Identify and acquire employee talent.
- Identify opportunities to create and/or acquire new Divisions.
- Provide leadership to develop the next generation of Company leaders.
- Collaborate to create needed industry certification designations.
- Identify trends, and set standards and benchmarks allowing members to be industry leaders.
- Assist with development of legislative initiative agenda to benefit members and patients.

##### Accomplishments:

- Created new courses and programs delivered nationwide in face-to-face settings and online.
- Expanded annual Heartland Conference bringing over 1,000 members to Waterloo for a week of education, training, and networking.
- Sponsored training programs for members regionally across the United States.
- Attended or represented at over 40 conferences and conventions annually.

- Developed a six-month internal training program to identify and prepare future leaders.
- Developed internal program to challenge experienced leaders allowing them to network with employees and mentor future leaders.
- Increased by 10% annually the volume of education and training provided.
- Updated online software delivery system.
- Assembled network of professional partners to create and deliver compliance, training, certification opportunities, and business support services.
- Developed internal teams of experts to create programming to expand into new continuing education markets.
- VGM became the industry leader in legislative efforts at the national level to impact changes to funding and coverage for individuals in the Home Medical Equipment market.
- The number of member companies increased to over 9,000.
- Number of VGM Divisions grew from 21 to 27.
- Number of employees increased from 456 to 831.
- The share price of Company stock doubled.
- VGM was named the #1 Workplace by the Des Moines Register.

**Hawkeye Community College; Waterloo, Iowa****2002-2010**

Hawkeye Community College is comprehensive community college serving all or parts of ten counties in Northeast Iowa with 6,663 students, 300 faculty and staff and an annual budget of \$30M (2010).

**President****2005-2010****Responsibilities:**

- Be a student-centered leader who is guided by student and community needs in his or her decisions.
- Nurture existing high-quality educational programs and services, support innovations and new technology, and challenge personnel to respond to emerging student, business, and community needs.
- Maintain a level of high visibility, both on and off campus.
- Develop effective partnerships with area business, industry, government, and community-based organizations to promote the effectiveness of the college in workforce and economic development.
- Promote the success of the Hawkeye Community College Foundation to bring new resources to the college.
- Understand funding mechanisms, budget development, and fiscal accountability.
- Be knowledgeable about current educational trends and committed to quality in education.
- Provide for development, implementation, and continuous improvement of the institutional strategic plan.
- Continue the College's commitment to diversity.
- Develop and foster effective partnerships with area schools, colleges, universities, and other Iowa community colleges.
- Communicate with local, state, and national leaders on issues vital to the community college.
- Nurture a collaborative approach to problem solving and decision-making.

## Accomplishments:

- Led the development of the Strategic Planning Process and its successful execution.
- Created the Hawkeye Innovative Program Fund (HIP) to support the creation of new programs or the expansion of existing programs. Funds were awarded through an internal competitive grant process.
- Encouraged and supported faculty and staff personal and professional growth through talent development initiatives.
- Completed the Academic Quality Improvement Process (AQIP) Systems Portfolio for submission to the Higher Learning Commission.
- Fall enrollment grew from 4,456 students in 2001 to 6,663 students in 2010.
- Minimized student tuition and fee increases to keep college affordable for students and to align the College more favorably with in-state peers.
- Attended Council for Resource Development (CRD) Presidents Fundraising Workshop and Executive Institute for Fundraising Leadership Workshop.
- Cultivated community members and leaders to become active supporters of the College and encouraged them to serve on various committees.
- Accepted the Hawkeye Foundation's largest single estate donation.
- Created Weekend College for working adults.
- Partnered with the Cedar Valley Tech Works project to provide training in a repurposed John Deere manufacturing facility and location converted to a training center, business incubator, museum and hotel with restaurant and amenities.
- Worked closely with the media on the publicity of College events and kept them informed of significant events occurring at the College.
- Proactively addressed the anticipated federal and state funding reductions prior to the great recession using recommendation from internal committees and external stakeholders. This allowed the College to direct its energies and resources on priorities to provide the maximum benefit to students.
- Added eight new faculty positions one year after funding reduction plan was implemented. These positions were based on programming needs and were not the same eight positions that were eliminated due to the previous year's budget reductions.
- Offered seven new programs in the two years following the budget reductions. This is the same number of new programs the College offered in the previous 12 years combined.
- Promoted Academic Admissions Partnerships with the three Regent institutions.
- Visited area Superintendents individually, and annually hosted the group on campus to build K-12 partnerships.
- Worked closely with the Iowa Association of Community College Presidents to advance various statewide education and job training projects.
- Convened enhanced Business and Industry teams including major area employers to assist with needed training programs.
- Obtained private support to fund a new full-time faculty position in Health Science.
- Increased the number of grant writers and related expertise and support.
- Annually hosted on campus every state representative elected from Merged Area VII. The College hosted candidates from both political parties during election years.
- Regularly welcomed prospective students and their families to campus at *Focus on Fridays*, a primary visitation day program.
- Multiple State legislative committee appearances and presentations to provide information or address concerns related to Community College legislation and funding.

- Collaborated with Iowa Community Colleges on legislative issues and shared funding to hire a consultant to represent our interests.
- Contracted with a national legislative consultant based in Washington DC to assist the College in securing federal grants or appropriations and advise the College regarding potential federal legislation. This led to the College's largest grant to date to assist in the construction of a LEED certified building.
- Dedicated the Brobst Center for Teaching and Learning Services, named in honor of long-time instructors and administrators Dr. Dan and Carol Brobst.
- Dedicated the Brock Student Center, honoring founder and long-time Board member Harold Brock.
- Major Capital Projects completed including Black Hawk Hall addition, Buchanan Hall renovations, Grundy Hall remodeled, Parking Lot improvements, Black Hawk Hall renovations, Physical Plant Boiler/Chiller upgrades, Western Outreach new building, Waverly Outreach remodel.
- Developed plans for the new Hawkeye Student Health Center in partnership with local health providers for student health services and new programming.
- Acquired 100 acres of land adjacent to campus for future expansion
- Developed plans for the new Regional Transportation Training Center on acquired land.
- Significant investment in new technology for Programs including simulation equipment in Health Sciences, Police Sciences, Truck Driving, and Auto Body programs.
- Charter member of community college Strategic Horizons Network Consortium.
- Supported the Rapid Response Team services to assist employees of companies that had significant layoffs or were closing.

Vice President of Administration and Finance

2002-2004

Responsibilities:

- Supervise personnel and functions relating to the Business Office, Human Resource Services, Institutional Computing, and Facilities Management.
- Supervise auxiliary functions including, but not limited to, cafeteria/food service, the childcare center, printing services, and copy services.
- Direct facility planning, construction, and remodeling.
- Manage the College Investment Plan.
- Assure adequate insurance coverage for College property.
- Develop agreements with other agencies for business services.
- Prepare cost analysis of programs and activities. Support other divisions in analyzing operations and preparing information for their decision-making.
- Prepare Annual Estimated Budget for Trustee certification.
- Prepare and/or approve all financial reports for Local, State, and Federal agencies.
- Serve as the Fiscal Officer for all Local, State, and Federal Grants.

Accomplishments:

- Provided financial and administrative services oversight and stability that ensured the credibility and trust in financial reports.
- Chaired oversight committee for bond issue and plant fund levies totaling \$37.5 million to upgrade existing buildings and construct new buildings.
- Developed a three-phase, 10-year master facility plan based on the College's educational and programming needs.

- Provided dozens of updates to community members and service clubs to share planning and gather feedback for upcoming bond votes.
- Received Community support for a revised bond issue vote in June 2003 (63.68% approval) after earlier plans narrowly failed in December 2010 (59.02% approval) and in May 2001 (54.61% approval).
- Received voter approval of 10-year Property, Plant and Equipment Levy in September 2003 (63.88% approval).
- Negotiated agreement between the Board and the publisher of the major local newspaper to settle an Iowa Open Meetings Law violation lawsuit that had been in litigation for three years.
- Reduced excessive backlog of faculty and staff grievances and lawsuits and implemented processes to address and resolve issues in a timely manner.
- Participated in interest-based bargaining with faculty association.
- Developed a five-year operating plan.
- Represented the College to help develop the Cedar Valley Coalition legislative agenda and trips to Washington DC.
- Met regularly with state elected representatives locally and at the Statehouse during the legislative session, providing data and support for legislative initiatives.
- Provided oversight of College Foundation Director and operations.
- Worked closely with area employers and economic development organizations on State jobs training programs.
- Earned the Governmental Finance Officers Association Certificated of Achievement for Excellence in Financial Reporting.
- Received the Association of School Business Officials International Excellence in Financial Reporting.
- Led effort to develop the Hawkeye Technology Access Center in Cedar Falls.
- Developed a multi-year plan to upgrade the technology infrastructure and provide classroom technology upgrades and implement new administrative software.
- Worked collaboratively with other Iowa community colleges to advance Computer Consortia to coordinate service needs, data storage, and disaster recovery services.
- Met with and presented to area school boards to provide College updates and build relationships, which led to the agreement to establish three remote learning centers.
- Worked with City and County officials to explore and establish shared administrative services including technology connectivity and support, print services, and coordinated purchases.

### **Waterloo Community School District; Waterloo, Iowa**

**1997-2001**

Waterloo Community School District provides pre-K through 12 education to a diverse population of 11,000+ students at 14 elementary schools, four middle schools and three high schools with 1,200+ employees and a total annual budget of \$71 million (1999).

Executive Director of Administrative Services/Treasurer

1999-2001

Executive Director of Financial Services/Treasurer

1997-1998

Responsibilities:

- Oversee all business and financial operations to support teaching and learning.
- District Treasurer.
- Oversee planning and operations of non-academic services with a support staff of 250 personnel.
- Prepare annual budget and year-end financial statements.
- Complete Federal, State and Local filing requirements for reports and levies.
- Planning, operation, and maintenance for 27 district facilities.
- Print Services for all school purposes and City and County operations.
- Oversee transportation for student busing and activities.
- Coordination of food service operations for breakfast, lunch, after-school, and summer programs.
- Provide support for contract negotiations.
- Oversee technology hardware, wiring, and connectivity plans.

Accomplishments:

- Led the efforts in the development and implementation of the reorganization and turnaround of the District's financial and administrative operations.
- Coordinated an intensive nine-month study of District facilities, which provided recommendations that lead to voter approval of \$103 million for facility improvements, the largest successful K-12 bond issue at the time in Iowa.
- Developed three-year and then five-year detailed operating budget projections.
- Developed short- and long-range facility planning for maintenance, renovation and new construction based on student demographics and projected City residential growth patterns.
- Worked with private and public entities to acquire and/or trade land for new facilities.
- Reduced District debt from \$5.7 million in 1995-1996 to \$0 in 1998-99.
- Increased District Unreserved Undesignated Fund Balance from negative \$7.2 million in 1995-96 to positive \$422,445 in 1998-99.
- Presented annual updates to the State Board of Education School Budget Review Committee until WCSD was successfully removed from direct State oversight, which was required for five years after filing bankruptcy and receiving additional spending authority in 1995.
- Returned District to financial solvency and significantly increased fund balances to levels recommended by the State.
- Earned the Governmental Finance Officers Association (GFOA) Certificated of Achievement for Excellence in Financial Reporting attesting that the District's Certified Annual Financial Report (CAFR) achieved the highest standards in government accounting and financial reporting. The District received this award in my first year of employment and every year following.
- Received the Association of School Business Officials International Excellence in Financial Reporting for the Districts CAFR every year I was at the District.
- Participated in research for and implementation of classroom technology.
- Coordinated planning and bid process and subsequent construction process on new school buildings and major upgrades to existing buildings.
- Administration Negotiation Team co-chair with negotiations resulting in multi-year contracts with respective Associations.

**Chicago, Central & Pacific Railroad Company; Waterloo, Iowa****1989-1996**

Chicago, Central & Pacific Railroad (CCP) is a Regional Railroad with a main line from Chicago, IL to Omaha, NE and subsidiaries and branch lines to Sioux City, IA, Cedar Rapids, IA, and Glenville, MN. It was created as a spin-off of a national carrier in 1985 during the era of de-regulation of the transportation industries and serves primarily agricultural, energy and intermodal customers. After three unprofitable years CCP was bankrupt and the new owners hired me to join the management team. CCP had annual revenues of \$73 million and 436 employees (1995).

<u>Controller</u>	1994-1996
<u>Director of Revenue Accounting</u>	1990-1993
<u>Director of Disbursements</u>	1989

## Responsibilities:

- Annual budget and year-end accounting reports.
- Monthly financial statements and accounting/consolidation for subsidiaries.
- Oversight of human resource and payroll functions.
- Leadership for technology and information systems.
- Oversight of Revenue Accounting, Revenue Divisions, Disbursement Accounting, and Car Hire Departments.

## Accomplishments:

- Worked with team to reorganize debt and structure sale/lease-back agreements to bring Company out of bankruptcy.
- Was the only member of the (post-bankruptcy) team with no direct railroad industry experience.
- Restructured administrative operations and automated appropriate job functions.
- Established internal controls and procedures manuals and standardized processes.
- Developed benchmarks to measure and report key operating and financial ratios.
- Provided support to update the marketing and pricing structure for existing customers and transportation partners.
- Improved the accuracy of and reduced the time to produce final monthly financial reports from greater than 30 days to 5 days.
- Operating income increased from \$8.5 million in 1989 to \$22.8 million in 1995.
- Company became profitable after two years and was debt free after seven years.
- Worked with acquisition team to evaluate and act on expansion opportunities.
- Worked with staff to support negotiations for seven unions as well as non-bargaining employees.
- Member of national group of railroad peers addressing industry issues and inter-company exchange of data.
- Led internal effort to prepare and implement national Electronic Data Interchange of all of the Company's rolling equipment and related pricing and revenue divisions.
- Project lead for 18-month replacement of major computer operating system.
- Worked with State and local municipalities to increase the number of businesses and volume.
- Provided detail support for the sale of Company to Illinois Central Railroad in 1996 for a price substantially higher than it was initially sold for.

**Henke Manufacturing Company; Waverly, Iowa**

**1988**

Henke Manufacturing Company was a second generation company with 50+ employees manufacturing industrial snow plows and attachments and was a distributor of operational parts for municipalities.

Vice President, Controller

Responsibilities:

- Administrative functions including finance, budgeting, cost-accounting, accounting, human resources and legal.
- Lead representative in labor negotiations and contract issues with the local UAW.
- Cultivate relationships with vendors and financing sources.

Accomplishments:

- Created RFP to evaluate and replace employee health care coverage plans.
- Implemented new purchasing and processing systems to manage inventory.
- Developed cost accounting models to set pricing and track product profitability.
- Secured increased financing for product line expansion.

**KPMG Peat Marwick; Des Moines, Iowa**

**1983-1987**

KPMG Peat Marwick is a leading worldwide provider of financial audit, advisory and tax services.

Audit Supervising Senior

Responsibilities:

- Supervise audit activities and compile and present required reports.
- Develop budgets and plan engagements to coordinate timing with client and scheduled workload of staff to meet the established deadlines.
- Provide training, supervision, and performance review for professional staff subordinates.
- Work closely with client staff to complete contracted services.

Accomplishments:

- Worked as part of team gaining progressively more responsibility and exposure to a variety of for-profit (public and private) and not-for-profit organizations.
- Worked closely with internal staff of a major insurance company client to create documents and reports required to take the company public.
- Gained exposure to various industries and practices by working with clients in Financial, Manufacturing, Insurance, Education, and Governmental sectors.
- Gained supervisory experience and skills working with staff members and successful business leaders.
- Exposed to best practices, as well as to all practices, for financial and business matters while able to audit, observe and provide feedback to these enterprises.



**GREG SCHMITZ, Ph.D.**

## **EDUCATION**

Ph.D., Education, specialization in Educational Leadership; 2008

Iowa State University, Ames, IA

Master of Education, specialization in Higher Education; 2006

Iowa State University, Ames IA

Bachelor of Arts, Accounting, Business Administration; Minor: Computer Science; 1983

Wartburg College, Waverly, IA

Diploma, Don Bosco High School, Gilbertville, IA; 1979

## **FACULTY / TEACHING EXPERIENCE**

- Adjunct Instructor Wartburg College (2015)

## **COMMUNITY ACTIVITIES**

- Wartburg College Task Force on Regional Partnerships, Co-chair (2017-present)
- Western Home Community Board of Directors (2013-present)
- Wartburg College Transforming Tomorrow \$75M National Campaign Committee (2012-present)
- Wheaton Franciscan Health Care-Iowa Board of Directors, Board Chair (2011-present)
- Greater Cedar Valley Alliance Finance Committee (2010-2016)
- Wartburg College Presidents Advisory Council, Council Chair (2009-present)
- Martin Luther King, Jr Peace Walk Committee (2008-2010)
- Technology Association of Iowa Board of Directors (2007-2012)
- Cedar Valley's Promise Board of Directors (2007-2010)
- Allen College of Nursing Board of Directors (2007-2010)
- Iowa Advanced Manufacturing Council (2007-2009)
- Greater Cedar Valley Alliance Board of Directors (2005-2010)
- Greater Cedar Valley Alliance Economic Development Committee (2003-2005)
- Waterloo Airport Air Service Task Force Commission (2002-2005)
- Waterloo Chamber of Commerce Board of Directors (2002-2004)
- Lions Clubs International (2002-2004, 2017-present)
- Cedar Valley Coalition (2000-2004)
- Waterloo Downtown Rotary Club, Board Member (1997-2011)
- Boys & Girls Club Board Member (1997-2000)
- Waterloo Chamber Commercial and Industrial Development Division Board (1995-1998)
- Volunteer youth coach (1988-2011)

## **FUNDRAISING ACCOMPLISHMENTS**

- The Hawkeye Foundation received its largest single estate donation (at that time).
- Worked with area foundations to provide support for College programs and services.
- Worked with local attorneys and financial planners to secure future bequests to the College Foundation.
- Implemented the process to begin preparations for a Hawkeye Foundation major gift campaign.
- Member of Wartburg College Transforming Tomorrow National Campaign Committee, exceeding \$75M goal by over \$9M.
- Assisted with United Way, Junior Achievement, and Chamber Fundraising initiatives.

**SELECTED PROFESSIONAL ACTIVITIES**

- Symposium Club (2005-present)
- Iowa Association of Community College Presidents (2005-2010)
- American Association of Community Colleges (2005-2010)
- League for Innovation in the Community College (2005-2010)
- League for Innovation in the Community College, Executive Leadership Institute (2005)
- Spokesmen's Club (2003-present)
- Government Finance Officers Association (1996-2005)
- Association of School Business Officials (1996-2001)
- Institute of Management Accountants (1989-1996)
- Iowa Society of CPA's (1985-present)
- American Institute of CPA's (1985-present)

**AWARDS**

- Nominated for the Cedar Valley Business Leader sponsored by the Greater Cedar Valley Chamber of Commerce Cedar Falls-Waterloo (2009)
- Honorary Doctor of Humane Letters, Wartburg College (2007)
- Wartburg College Athletic Hall of Fame (2005)
- The Higher Learning Commission Academic Quality Improvement Project, Certificate of Recognition (2003)
- Governmental Finance Officers Association Certificated of Achievement for Excellence in Financial Reporting (1997-2005)
- Association of School Business Officials International Excellence in Financial Reporting (1997-2005)
- Iowa School Business Management Academy (1999)
- CPA certification (1985)

**SELECTED WORKSHOP / CONVENTION PRESENTATIONS**

- Wartburg College Regional Partnerships Task Force, 2017
- Multiple, as President of VGM Education (2006-2016)
- Heartland Conference (2011-2015)
- Successful Levy Campaign Strategies, League of Innovation in the Community College, 2005.
- Successful Campaign Strategies, Innovations Conference, 2005. Co-presented with Dr. Kathy Brock, Vice President Northwest Iowa Community College
- Association of School Business Officials (1998-2001)