



School of Business

School of Business

AY2023-24

Part-time Faculty CVs

For list of CVs, please click on this icon on the right side of the page -



Vahid Ashrafimoghari

Phone: +1 (201) 417-4992 | E-mail: vahid.ashrafi@gmail.com | LinkedIn: <https://www.linkedin.com/in/vahidashrafi/>

EDUCATION

Ph.D. in Business Administration (Information Systems & Data Analytics) **2020- Current**
Stevens Institute of Technology, School of Business, Hoboken, NJ, United States

Master of Business Administration (Strategic Management) **2008- 2011**
University of Tehran, Tehran, Iran

BSc. in Mechanical Engineering **2002-2007**
Isfahan University of Technology (IUT), Isfahan, Iran

RESEARCH INTERESTS

Computational Social Science | Behavioral Economics | Human-Computer Interactions | Decision Support Systems | Cognitive Modeling | Policy Research | Large Language Models (LLMs)

ACADEMIC EXPERIENCE

Lecturer **Spring & Fall, 2024**

- Management of A.I. Technologies, BIA-568, *MSBA elective*

Research Fellow **2020 – Current**
Cognition Lab, Stevens Institute of Technology

- Developed NLP tools leveraging large language models to detect and highlight cognitive biases in texts.
- Developed an information gap detector to measure the pairwise content gap between 28 Wikipedia language editions.
- Designed a novel language-learning architecture relying on gamification, crowdsourcing, and a human-in-the-loop model.
- Conducted research on new pricing schemes to increase transparency and consumer participation in pricing practices leveraging behavioral economics.
- Conducted research on the role of transparency in online content moderation.
- Developed a price optimization model for the entertainment industry focusing on theater ticket pricing.
- Proposed a method to increase willingness to save among college-age students by associating saving with playing games.

Research Associate **2016 –2018**
Center for Advanced Hindsight, Duke University

- Conducted research on applying behavioral economics concepts to design/redesign financial and healthcare products and services.
- Conducted a research project on drivers of our perceptions of wealth inequality across different contexts.
- Advised five Fintech and Health-tech startups to improve their value proposition design by incorporating behavioral economics findings.
- Helped Kenyans use a mobile platform to increase savings and remittances for health in a joint project between the Center for Advanced Hindsight, the Joep Lange Institute, and the PharmAccess Foundation.
- Advised non-profit organizations such as GRAMEEN America, ACCION, CFSI, LISC, and United Way of Tucson.
- Assisted in holding events to teach corporate clients how to implement behavioral economics to redesign their products, services, and policies.

Visiting Scholar **May 2017- Aug 2017**
Duke University, Economics Department

INDUSTRY EXPERIENCE

General Manager of Investments and Partnerships

Aug 2019 – Sep 2020

VISTA Investment Partners (Corporate VC)

- Oversaw activities to manage limited partner's investments in various start-ups.
- Drove year-on-year business growth while leading operations, strategic vision, and long-range planning.
- Delivered business strategy and developed systems and procedures to improve operational quality and team efficiency.

Chief Project Officer

Jun 2018 – Jul 2019

MABNA ICT Company

- Provided leadership, direction, and oversight of corporate programs and projects under development and execution
- Provided executive oversight for divisional projects and maintained responsibility for data integration and reporting for projects and programs within the organization
- Adjusted project plans to account for dynamic targets, staffing changes, and operational specifications.

Senior Marketing Manager

May 2014 – Mar 2016

MTN Irancell (Telecom Company)

- Led a team of 14 marketing professionals to achieve over 25 million data users and USD 500 million in revenue over one year.
- Oversaw Go-To-Market plans from concept through completion for the launch and monetization of broadband-related products and services.
- Oversaw commercial activities required before the launch of IPTV service (such as business planning, Developing GTM plan, branding, UX/UI design, negotiation with content owners/aggregators, etc.).

Market Development Manager

Jul 2012– May 2014

MTN Irancell (Telecom Company)

- Managed to find new markets and customer segments for internet services through defining regional campaigns led to an average of 200% sales growth across regional markets.
- Managed the timely preparation of regular customer insight reports and management dashboards to measure and monitor key marketing metrics.
- Established, initiated, and optimized business development strategies based on company targets, product specifications, market data, and budget factors.

SPONSORED RESEARCH PROJECTS

Developing an AI-powered Cognitive Advisor for Identifying and Mitigating Cognitive Errors

2022-2024

Cognition Lab

Examining Individuals' Perceptions of Wealth Inequality and Its Implications for Social and Economic Policymaking

2018

Center for Advanced Hindsight

Helping Members to Transition from Using Cash to Disbursement Cards

2017 - 2018

A joint project between the Center for Advanced Hindsight and GRAMEEN America

Helping Small Business Owners to Complete Loan Applications

2017 - 2018

A joint project between the Center for Advanced Hindsight and ACCION

Optimize the Credit Counseling Sessions and Increase the Number of People Who Sign-up for the Service

A joint project between the Center for Advanced Hindsight and Navicore Solutions

2016 - 2017

Helping Kenyans to use the M-TIBA platform for increasing savings and remittances for health

A joint project between the Center for Advanced Hindsight, Joep Lange Institute, and the PharmAccess Foundation

2016 – 2017

PUBLICATIONS

- [1] Ashrafimoghari, V., Gürkan, N., & Suchow, J. W. (2024). Evaluating Large Language Models on the GMAT: Implications for the Future of Business Education. *arXiv preprint arXiv:2401.02985*.
- [2] Suchow, J. W., Burton, L., & Ashrafimoghari, V. (2023, May). The Design and Operation of Digital Platform Under Sociotechnical Folk Theories. In *Twenty-ninth Americas Conference on Information Systems, Panama*.
- [3] Ashrafimoghari, V. (2023, April). Detecting Cross-Lingual Information Gaps in Wikipedia. In *Companion Proceedings of the ACM Web Conference 2023* (pp. 581-585).
- [4] Suchow, J. W., & Ashrafimoghari, V. (2022). The paradox of learning categories from rare examples: a case study of NFTs & The Bored Ape Yacht Club. In *Proceedings of the Annual Meeting of the Cognitive Science Society* (Vol. 44, No. 44).
- [5] Ashrafimoghari, V., & Suchow, J. W. (2022, April). A Game-Theoretic Model of the Consumer Behavior under Pay-What-You-Want Pricing Strategy. In *Proceeding of the 51st annual conference of the Decision Sciences Institute, New Jersey*.
- [6] Ashrafimoghari, V. (2022). Big Data and Education: using big data analytics in language learning. *arXiv preprint arXiv:2207.10572*.

POSTERS, TALKS & PRESENTATIONS

- [1] Saad-Lessler, J., Ashrafimoghari, V., & Suchow, J. W. (2022). Can a virtual 'pet' take a bite out of the savings shortfall? Presented as a poster at ASSA 2022 Virtual Annual Meeting.
- [2] Burton, L., Ashrafimoghari, V. & Suchow, J. W. (2022). Transparency in online community moderation: the case of shadowbanning. Presented at NEDSI 2022 in Newark, NJ.

INVENTIONS

Vahid Ashrafimoghari and Jordan W. Suchow, "Information systems that detect diagnose and mitigate cognitive errors and logical fallacies", U.S. Provisional Patent Application No. 63/607,352, Filed December 7, 2023. Provisional patent application.

HONORS & AWARDS

- Lifetime Member, Beta Gamma Sigma Honorary Business School Society, 2023.
- Best Application of Theory Award, The 51st Annual Conference of the Decision Science Institute, New Jersey, 7-9 April 2022
- Provost Fellowship (2020 – 2024), Stevens Institute of Technology, School of Business
- Ranked 2nd in the Class of 2008 for the graduate cumulative GPA among all peers. Department of Business Management, University of Tehran, Tehran, Iran
- Ranked among the top 1000 in Iran's National University Entrance Exam (very competitive with over 600K participants)

JOURNAL, CONFERENCE & GRANT REVIEWING

Ad hoc reviewer for (alphabetical):

- The ACM Conference on Computer-Supported Cooperative Work and Social Computing (CSCW)
- The ACM Conference on Human Factors in Computing Systems (CHI)
- The Annual Conference of the Cognitive Science Society (CogSci)
- The International Conference on Information Systems (ICIS)
- The International Journal of Computer Vision (IJCV)
- The International Conference on Human-Agent Interaction (HAI)

PROFESSIONAL SERVICES

Reviewer Board, American Journal of Computer Science and Technology (AJCST)

2024 – Current

PROFESSIONAL MEMBERSHIPS

Association for Computing Machinery (ACM)

Cognitive Science Society (CogSci)

Society for Judgment and Decision Making (SJDM)

SKILLS

Language: Persian (Mother Tongue), English (Proficient), Spanish (Basic)
Computer Software: STATA, Microsoft Office, and Tableau
Programming Languages: Python, R, and Solidity
Business Skills: Business Modeling, Financial Modeling, Pricing, Project Management, Marketing Management, Data analytics, and Design Thinking
Research Skills: Experiment design, Survey design, and Statistical Analysis
Technical Skills: Prompt Engineering

REFERENCES

Jordan W. Suchow, Assistant Professor at Stevens Institute of Technology & Director of the Cognition Lab

Stevens Institute of Technology, Hoboken, NJ, United States

(914) 582-2646, jws@stevens.edu

Jeffrey Nickerson, Professor at Stevens Institute of Technology

Stevens Institute of Technology, Hoboken, NJ, United States

(201) 216-8124, jnickers@stevens.edu

Dan Ariely, Professor at Duke University & Director of the Center for Advanced Hindsight (CAH)

Duke University, United States

(617) 314-4329, dan@danariely.com

IVAN BAKRAC

25 Park Lane South 1604 • Jersey City, NJ 07310 • 917-907-0864 • ivanb.bakrac@gmail.com • LinkedIn

SUMMARY OF QUALIFICATIONS

Ivan Bakrac currently serves as the Head of Treasury at ConsenSys | Senior Market Strategist. With a career spanning two decades, Ivan has held diverse positions, including roles as a senior finance leader in a high growth blockchain technology start-up, head of portfolio management, fixed income portfolio manager, quantitative researcher, risk manager, and data analytics expert. His current focus centers on emerging technologies, which encompass digital assets, blockchain, financial machine learning, AI, and predictive analytics. He is proficient in data science and machine learning, with a notable focus on integrating these disciplines into asset management and financial analytics. His previous positions include Head of Multi-Sector Fixed Income Portfolio Management at Invesco, Lead Fixed Income Portfolio Manager, and Co-Head of Quantitative Strategies at Franklin Templeton Investments. Ivan holds a Master of Science in Financial Analytics & Data Science from Stevens Institute of Technology and a Master of Science in Financial Engineering from NYU Tandon School of Engineering. In addition to his industry roles, he contributes to academia as an Adjunct Professor at several prestigious institutions. At Berkeley College Business School, he teaches courses on Global FinTech, AI, and Data Science. He also holds the positions of Adjunct Professor of Practice for Emerging Technologies at Wake Forest University, Adjunct Professor for Financial Technology & Analytics at Stevens Institute of Technology, Affiliated Faculty at CRAFT - Center for Research toward Advancing Financial Technologies, and Adjunct Faculty for Enterprise Risk Management at Columbia University.

PROFESSIONAL HIGHLIGHTS

- **Domain** - Fixed Income & Macro, Digital Assets, Portfolio Management, Quantitative Investment Strategies
- **Leadership** - Led Investment, Quantitative, Treasury, Strategic Initiatives Teams in Asset Management & FinTech
- **Technical Skills** - Python & R, Predictive Analytics, Financial Data Science & Machine Learning

PROFESSIONAL EXPERIENCE

- CONSENSYS, New York** **9/21-Present**
Head of Treasury at ConsenSys | Senior Market Strategist
- Led treasury management for CSI overseeing operations, investments, and policy implementation.
 - Managed capital markets activities, executing strategies for yield generation, funding, and hedging.
 - Developed machine learning models and predictive analytics for digital assets and treasury portfolio.
 - Developed pricing models using machine learning, incorporating key performance indicators as features.
 - Created cashflow projection models with Monte Carlo simulation, along with valuation models for M&A.
 - Oversaw financial operations of Linea, Ethereum's scaling solution, including revenue and margin modeling.
 - Achieved significant results, generating \$8MM in income and realizing \$110MM in savings over a 2-year period.
- COLUMBIA UNIVERSITY, New York** **8/23-Present**
Adjunct Faculty - Lecturer | Enterprise Risk Management (ERM)
- Lecturer for Enterprise Risk Management (ERM) in the MS Program.
- STEVENS INSTITUTE OF TECHNOLOGY, New Jersey** **6/22-Present**
Adjunct Professor | FinTech & Analytics
- Adjunct Professor in FinTech & Analytics.
 - Affiliated Faculty at CRAFT - Center for Research toward Advancing Financial Technologies.
- BERKELEY COLLEGE, New Jersey** **7/21-Present**
Adjunct Professor | Global FinTech & AI & Business Data Science
- Designed and currently teaching Global FinTech, AI, Business Data Science, and Data Analytics.

IVAN BAKRAC

- Advisory Board Member for Business Data Science (BDS).

WAKE FOREST UNIVERSITY, North Carolina

9/23-Present

Adjunct Professor of Practice | Emerging Technologies

- Adjunct Professor of Practice in FinTech & Analytics.
- Currently teaching Emerging Technologies: AI & Blockchain.

CELSIUS NETWORK, New Jersey

1/21-9/21

Portfolio Risk Manager | Market Risk - Digital Assets

- Responsible for investment analysis of crypto strategies including protocol research and staking strategies.

INDEPENDENT CONSULTING, New York

2018-2020

Consultant | Financial Data Science

- Engaged in consulting arrangements in various capacities related to emerging technologies, data analytics, and machine learning with applications to investment management.

INVESCO, Atlanta, GA

2014-2017

Head of Multi-Sector Fixed Income Portfolio Management | Head of Macro Quantitative Strategies Team

- Led multi-sector fixed income portfolio management effort, overseeing portfolios, and managing a team of portfolio managers and quantitative analysts.
- Managed asset allocation encompassing macro products, rates, currencies, credit, emerging markets, securitized, and fixed income derivatives.
- Built a quantitative multi-sector fixed income strategy integrating global macro factors and sector-level expertise, achieving strong relative performance and a proven track record of mitigating macro risks during 2014-2016.
- Instituted global macro and cross-asset relative value trades utilizing cash and derivatives that include investment grade vs. municipal credit, high-yield vs. bank loans and corporate credit capital structure relative value trades.

FRANKLIN TEMPLETON INVESTMENTS, New York

2005-2014

VP | Fixed Income Portfolio Manager & Co-Head of Quantitative Fixed Income Research & Strategies

- Co-managed global multi-sector fixed income portfolios: Collaborated in overseeing portfolios involving macro products, rates, currencies, credit, emerging markets, securitized, and fixed income derivatives.
- Co-headed quantitative strategies team: Led the team responsible for fixed income quantitative strategies, portfolio construction, and derivatives strategies.
- Tactical asset allocation and strategy design: Designed and implemented tactical asset allocation, sector, country, currency, and duration strategies, contributing to strong relative performance for the absolute return fixed income strategy from 2009 to 2014.
- Research across asset classes: Led research across various asset classes, including Global Rates, TIPS, FX, Volatility, EMD, and Credit Sectors, implementing diverse portfolio hedging strategies in macro markets.
- Derivatives market expertise: Utilized derivatives markets such as CDS, CDX, FX forwards and options, swaptions, swaps, total return swaps, and volatility structures for implementing portfolio hedging and risk management strategies.
- Product line development: Partnered with senior PMs and product managers to build and strengthen new fixed income product lines, including liability-driven investing (LDI), credit relative value, short duration, unconstrained fixed income strategy, absolute return, and portable alpha.
- Model development: Built quantitative tools and models related to sector allocation, swap spreads, and rates prediction, enhancing portfolio construction, risk management, and performance analysis capabilities.

HSBC, New York

Fall 2005

Quantitative Research Consultant | Emerging Markets Fixed Income

AUERBACH GRAYSON, New York

Spring 2005

Equity Research Intern | Emerging Markets Equity Research

TECHNICAL SKILLS

- Machine Learning in R & Python - Supervised, Unsupervised, Deep Learning with Keras & TensorFlow, Basic RL
- EDA, Statistical, Financial Time Series & Forecasting Methods, Machine Learning in Finance

IVAN BAKRAC

- Data Visualization, Data Mining, Inference, Predictive & Prescriptive Analytics
 - NLP, Text Mining, Web Mining, Big Data Technologies, Business Intelligence & Analytics
-

FINANCIAL DATA ANALYTICS PROJECTS

- Application of Text Mining & Unsupervised Text Classification on FOMC Minutes
 - Application of Machine Learning and Deep Learning Methods in Credit Markets Pricing
 - Deep Learning Applications on Financial 10-K Reports
 - Application of Large Language Models (LLM) in Finance
-

EDUCATION

- Stevens Institute of Technology, New Jersey - **Master of Science in Financial Data Science**, GPA 4.0, 2020
- NYU, Tandon School of Engineering, New York - **Master of Science in Financial Engineering**, GPA 3.7, 2007
- Baruch College, New York, Major: Finance & Investments, Minor: Mathematics, BBA, GPA 3.5, 2004

Thomas F. Brantle
77 Pape Drive
Atlantic Highlands, NJ 07716
(908) 963-8139
thomas.brantle@verizon.net

Education

Ph.D. / M.S.M. Technology Management, School of Business, Stevens Institute of Technology, Hoboken, NJ (2010 / 2006)

Fellowship: Robert Crooks Stanley Graduate Fellowship in Engineering and Science
Honors: Outstanding Academic Achievement Award in Technology Management Ph.D. Program
Dissertation: Complexity, Innovation and Economic Growth: The Competitive Network of Innovation and Organizational Size and Growth in Innovation
Qualifying Exams (4): (i) Engineering Economics, Decision Analysis and Management Policy; (ii) Applied Statistical Models; (iii) Probability and Stochastic Processes; (iv) Telecommunications, Data and Computer Communications, Computer Networks and TCP/IP Protocols, and Information Networks and Systems
Common Core Comprehensive Exam: Research Methods (research design: qualitative, quantitative, and mixed methods approaches) and Applied Statistics (regression analysis, analysis of variance, experimental design, and multivariate data analysis).

M.A. Statistics and Operations Research, Department of Statistics, The Pennsylvania State University, University Park, PA (1979)

Fellowship: Research Fellowship from MINITAB Statistical Computing Project
Thesis: Modifying Estimators to Reduce Quadratic Loss
Passed Ph.D. Qualifying Exam in Applied Statistics Area of Concentration: Exploratory Data Analysis, Regression Analysis and Modeling, Analysis of Variance and Experimental Design, and Advanced Experimental Design.

M.S. Statistics and Computer Science, Department of Computer Science and Statistics, University of Rhode Island, Kingston, RI (1976)

Fellowship: National Science Foundation (NSF) Research Fellowship, New Algorithms for Statistical Computation
Thesis: A Study of Ridge Regression: Explicit and Constrained Generalized Ridge Estimation

B.S. Mathematics and Computer Science, Department of Mathematics, State University of New York at Cortland, Cortland, NY (1973)

Scholarship: State of New York Regents Scholarship
Honors: Cum Laude, Dean's List and Varsity Letter in Soccer

Professional Certification

P.M.P. – Project Management Professional, Project Management Institute (P.M.I.), Newtown Square, PA (expires: August 2026, expected to be renewed at that time.)

Experience

Colorado State University – Global (CSU-Global), Denver CO [2011 – Present]

Program Director, Project Management / Operations Management & Construction Management, BS-PJM and Masters-PJM Programs, and Undergraduate and Graduate Certificate Programs

Teaching Areas/Interests and Curriculum Development

Accreditation: Originator, creator and architect of the Project Management and Operations and Supply Chain Management programs at CSU-Global. Led the Project Management program to its initial (3 year) and recent reaffirmation (5 year extension) of its PMI (Project Management Institute) GAC (Global Accreditation Center for Project Management programs) accreditation. Directed and supervised, 40+ Adjunct faculty, four (4) part-time Lead Faculty and one (1) full-time Faculty Lead across the three programs: Project Management, Operations Management, and Construction Management.

Teaching and curriculum development: for courses across project, operations, supply, and construction management, business management and economics, technology and innovation management, managerial statistics and management science (operations research), and information systems and technology. Expert proficiency with project management systems software (e.g., Microsoft Project, Project Libre, and Oracle Primavera) as well as statistics and analytics software (e.g., SAS, R, Python, Tableau, SQL, and SPSS), including applications of artificial intelligence (AI). Students include traditional and non-traditional students, part-time and full-time students, and working professionals and adult students, across diverse cultural backgrounds. Considerable expertise in the incorporation of instructional technology into the teaching and education environment; demonstrated proficiency with online education, course design, development, delivery, and assessment; first-hand experience using the newest instructional technologies, including learning/course management systems (LMS/CMS) (e.g., Canvas, Frost, Schoology, Equella, D2L Brightspace, Moodle, and Blackboard) as well as the incorporation of web, video and voice conferencing systems (e.g., ZOOM, Blackboard Collaborate, Adobe Connect, and Wimba). Dedicated to an interdisciplinary approach to scholarship and teaching, nurturing an interactive and collaborative environment with students and colleagues.

Department / University Service: Key contributor and leader for CSU-Global's PMI-GAC (Project Management Institute – Global Accreditation Center) Accreditation initiative and response; ACBSP (Accreditation Council for Business Schools and Programs) Committee member; Participated in program and university seminars and committees, including program and university curriculum development and training seminars and meetings.

Research Areas/Interests: Technology, business and innovation management; complex network analysis, data mining and social networks; applied statistics and business analytics, management science and operations research; project, operations and supply chain management; industrial organization, economic geography, and management strategy and public policy; telecommunications, computer networks and information systems.

Stevens Institute of Technology, Hoboken, NJ [2003 – Present]

Adjunct Professor (2011 – present) / Affiliate Industry Faculty / Instructor (2003 – 2010), School of Business

Teaching Areas/Interests and Curriculum Development: Teaching and curriculum development for a variety of my own courses across business intelligence and data analytics, applied probability and stochastic processes, management science and operations research, project and operations management, applied calculus, telecommunications, computer networks and information systems, technology and innovation management, and industry regulation and public policy. Designed and developed curriculum, and taught new courses. Course sections have included not only face-to-face classroom sections, but online courses in the distance education program (WebCampus), as well as off-campus industry corporate sites (e.g., Pfizer, Verizon, and Lockheed Martin). Students have included traditional and non-traditional students, part-time and full-time students, and working adults, across diverse cultural backgrounds; mentored and advised students, engaged students in research activities serving as a master's thesis advisor. Expert proficiency with project management systems software (e.g., Microsoft Project, Project Libre, and Oracle Primavera) as well as statistics and analytics software (e.g., SAS, R, Python, Tableau, SQL, and SPSS, as well as data management, databases, and SQL). Considerable expertise in the incorporation of instructional technology into the teaching and education environment; demonstrated proficiency with online education, course design, development, delivery, and assessment; first-hand experience using the newest instructional technologies, including learning/course management systems (LMS/CMS) (e.g., Canvas, Blackboard, and Moodle) as well as the incorporation of web, video and voice conferencing systems (e.g., ZOOM, Wimba / Elluminate – Blackboard Collaborate, Interwise/AT&T Connect), along with academic plagiarism detection and integrity tools (e.g., TurnItIn and SafeAssign). Dedicated to an interdisciplinary approach to scholarship and teaching, nurturing an interactive and collaborative environment with students and colleagues.

Department / University Service: Participated in department and university seminars and committees; AACSB (Association to Advance Collegiate Schools of Business) Committee member; including department and WebCampus curriculum development and training seminars and meetings.

Research Areas/Interests: Technology, business and innovation management; complex network analysis, data mining and social networks; applied statistics and business analytics, management science and

operations research; project and operations management; industrial organization, economic geography, and management strategy and public policy; telecommunications, computer networks and information systems.

Walden University [2011 – Present]

Contributing Professor, College of Management and Technology, MBA, MSM and BSBA Programs

Teaching Areas/Interests and Curriculum Development: Teaching and curriculum development for courses across information systems and information technology, technology and innovation management, project and operations management, and managerial statistics and management science (operations research), college algebra, and applied calculus. Students include traditional and non-traditional students, part-time and full-time students, and working professionals and adult students, across diverse cultural backgrounds. Considerable expertise in the incorporation of instructional technology into the teaching and education environment; demonstrated proficiency with online education, course design, development, delivery, and assessment; first-hand experience using the newest instructional technologies, including learning/course management systems (LMS/CMS) (e.g., Blackboard and eCollege) as well as the incorporation of web, video and voice conferencing systems (e.g., ZOOM, Blackboard Collaborate). Dedicated to an interdisciplinary approach to scholarship and teaching, nurturing an interactive and collaborative environment with students and colleagues.

Department / University Service: Participated in program and university seminars and committees, including program and university curriculum development and training seminars and meetings.

Research Areas/Interests: Technology, business and innovation management; complex network analysis, data mining and social networks; applied statistics and business analytics, management science and operations research; project and operations management; industrial organization, economic geography, and management strategy and public policy; telecommunications, computer networks and information systems.

Embry-Riddle Aeronautical University (ERAU) – Worldwide (ERAU-Worldwide) [2012 – Present]

Adjunct Assistant Professor – MS Project Management Program, College of Business; Department of Mathematics, Sciences and Technology, College of Arts and Sciences; Worldwide Campus.

Teaching Areas/Interests and Curriculum Development: Teaching and curriculum development for courses across project and operations management, managerial statistics and management science (operations research), college algebra, applied calculus, technology and innovation management, and information systems and technology. Students include traditional and non-traditional students, part-time and full-time students, and the Military as well as working professionals and adult students, across diverse cultural backgrounds. Expert proficiency with project management systems software (e.g., Microsoft Project, Project Libre, and Primavera) as well as analytics software (e.g., SAS, R, and Python). Considerable expertise in the incorporation of instructional technology into the teaching and education environment; demonstrated proficiency with online education, course design, development, delivery, and assessment; first-hand experience using the newest instructional technologies, including learning/course management systems (LMS/CMS) (e.g., Canvas and Blackboard) as well as the incorporation of web, video and voice conferencing systems (e.g., ZOOM, Adobe Connect, Eagle Vision, Blackboard Collaborate). Dedicated to an interdisciplinary approach to scholarship and teaching, nurturing an interactive and collaborative environment with students and colleagues.

Georgetown University, Washington, DC 2023

External Reviewer for Masters Project Management Program

Member of External Review Board: Provided review of MS PM Program and recommendations for going forward.

Stockton University, Galloway, NJ [2010 – 2011]

Visiting Assistant Professor of Computer Science and Information Systems, School of Business

Teaching Areas/Interests and Curriculum Development: Teaching and curriculum development for my own courses across statistics, operations research and information systems; interest in teaching and curriculum development across courses in computer science and information systems, statistics and

operations research, and project and operations management. Students included traditional and non-traditional students, part-time and full-time students, and working adults, across diverse cultural backgrounds; mentored and advised students, engaged students in potential research activities and independent study. Considerable expertise in the incorporation of instructional technology into the teaching and education environment; demonstrated proficiency with online education, course design, development, delivery, and assessment; first-hand experience using the newest instructional technologies, including learning/course management systems (LMS/CMS) (e.g., Canvas and Blackboard) as well as the incorporation of web, video and voice conferencing systems (e.g., Zoom and Wimba). Dedicated to an interdisciplinary approach to scholarship and teaching, nurturing an interactive and collaborative environment with students and colleagues.

Department / University Service: Participated in department and university seminars and committees, including department curriculum development and accreditation meetings, university Blackboard training seminars, and student computer society meetings and seminars.

Research Areas/Interests: Complex network analysis; data mining and social networks; applied statistics and operations research; project and operations management; computer networks and information systems; industrial organization and economic geography; management strategy and public policy; business, technology and innovation management.

Lucent Technologies, Holmdel, NJ [1997 – 2002]

Senior Account Executive / Director, Lucent Technologies, Global Account Management, Software Systems Sales, Global Service Providers Business Unit (1998-2002)

Developed, implemented and executed the product/solution sales and program management strategy for network operations management information systems and professional services across Lucent's AT&T Global accounts, having responsibility for all aspects of the direct sales relationship with the customer. Positioned Lucent's Intelligent Network (IN) and Operations Systems (OS) software products solutions as well as professional/managed services across Lucent's voice, data (e.g., Internet Protocol (IP)), and fiber-optic transport networking product offers with emphasis on IP and Voice over IP (VoIP) technologies and services. Established relationships with key customers; assessed and addressed customer needs and directions, issues and problems; assembled and coordinated various product and systems project teams to address customer solutions and respond to bids and proposal activities. Created end-to-end network operations management solutions for customers' new business initiatives; focused on teaming and partnership, account and project planning, contract and funnel management, and revenue attainment and profitability.

Certification: Account Executive and Sales Excellence, Lucent Sales Academy, Atlanta, GA.

Senior Product / Marketing Manager, Wireless Offer Management, Software Products Business Unit (1998)

Developed and managed the Wireless Operations Systems (OS) and Intelligent Network (IN) portfolio of product offers and solutions tailored for both domestic and international wireless service providers, creating and executing an effective and cost-efficient product and marketing strategy with the objective of having a detailed understanding of the business, the market and the technology. Analyzed market and technology trends and directions; assessed customer needs and strategies; completed competitive product analyses; developed sales and marketing material; performed bids and proposal activities; defined functional architecture and service/feature requirements. Managed 3rd party application development; advised and negotiated development costs, pricing strategy, supplier and customer contracts, and overall project budget; built synergy with other wireless product/solution offers.

Senior Technical Lead / Project Manager, AT&T Local Operations Project, Software Products Business Unit (1997)

Technical lead for the systems engineering, operations architecture and project management of AT&T's Local Number Portability (LNP) network operations management and Operations Systems (OS) software development planning and requirements project. Teamed with prime AT&T contacts to drive the LNP Switching System and Signaling System 7 (SS7) network operations strategy across AT&T's Local OSs and Intelligent Network (IN) services; defined the associated operations architecture, functions, data, and interface requirements within the Telecommunications Management Network (TMN) framework.

Bellcore (Bell Communications Research) [Bell Labs/Telcordia Technologies], Red Bank, NJ [1984 – 1997]

Senior Systems Engineer / Project Manager, Operations Technology Division, Technology Systems / Professional Services Business Unit

Lead systems engineer and project manager in the telecommunications network operations management and Operations Systems (OS) area. Defined strategic plans, as well as determined and defined cost efficient and operationally effective interoperability requirements for all forms communications services and systems on behalf of the telephone companies (i.e., the former Bell Operating Companies (BOCs)) with telecommunications equipment and systems vendors. Lead systems engineer, subject matter expert and project manager for the technical aspects associated with Fault, Configuration, Accounting, Performance, and Security (FCAPS) management functional features and network operations interface requirements for switching and transport systems, including consultative assignments with AT&T, NORTEL, Siemens, Ericsson, Fujitsu, NEC, Hewlett-Packard, and other industry vendors. I am the author of numerous industry planning and requirements standards documents published in the public domain. (1984 – 1997)

Lead systems engineer and consultant to AT&T Local to establish and define network operations management processes to support AT&T's local services and LNP project; defined and delivered associated strategic plans and requirements for OSs across the network. (1996- 1997)

General Motors Research Laboratories, Warren, MI [1979 – 1984]

Senior Research Scientist, Transportation and Logistics Research Department

Application and development of techniques from operations and supply chain management, operations research, statistics, and computer science to GM's customer sales order systems, supply chain, production scheduling, new vehicle and components/parts inventory, transportation logistics, related information systems, and other supply chain and distribution activities and issues. Applied research to assess the impact of changes in GM operating strategies and conditions external to GM; interaction and collaboration with assembly division, engineering, information systems, and transportation logistics staffs, and executive management across GM, as well as from the trucking and railroad carrier industry and components/parts supplier industry.

Asnuntuck Community College, State of Connecticut Community College System, Enfield CT [1975 – 1978]

Instructor and Coordinator, Mathematics Program

Instructed courses in developmental and college level mathematics, including calculus and statistics; coordinated, revised and expanded mathematics curriculum and supervised adjunct instructors; developed and administered diagnostic testing and placement program; initiated and designed individualized self-paced mathematics laboratory approach for developmental courses; instructed extension program courses at the Connecticut State Correctional Institution, Somers CT.

Professional Affiliations

Project Management Institute (PMI)
Institute for Operations Research and the Management Sciences (INFORMS)
Institute of Electrical and Electronics Engineers (IEEE)
Decision Sciences Institute (DSI)
American Statistical Association (ASA)
Academy of Management (AOM)
International Society for Professional Innovation Management (ISPIM)

Intellectual Contributions

Publications

Invited Articles

Brantle, T.F. and P. Patil. Get Automated – Automation Activation for Wireless Network Provisioning. *Wireless Review*, Vol. 16, No. 6, 16 – 22, March 15, 1999.

Refereed Journal Articles

Hemmerle, W.J. and T.F. Brantle. Explicit and Constrained Generalized Ridge Estimation. *Technometrics*, Vol. 20, No. 2, 109 – 120, May 1978.

Refereed Conference Proceedings

- Brantle, T.F. Scaling Variance of Growth Rates and Hierarchy in Innovation: Firms and Cities, *Proceedings of the Midwest Decision Sciences Institute (DSI) 2010 Annual Conference (MWDSI 2010)*. 2010. Toledo OH.
- Brantle, T.F. Statistical and Organizational Aspects of the Distribution of Growth Rates in Innovation, *Proceedings of the Midwest Decision Science Institute (DSI) 2010 Annual Conference (MWDSI 2010)*. 2010. Toledo OH.
- Brantle, T.F. Serial Growth Rate Correlation in Technological Innovation: Firms and Cities, *Proceedings of the Midwest Decision Sciences Institute (DSI) 2010 Annual Conference (MWDSI 2010)*. 2010. Toledo OH.
- Brantle, T.F. Zipf Distribution of Innovation: Firms and Cities, *Proceedings of the Northeast Decision Sciences Institute (DSI) 2010 Annual Conference (NEDSI 2010)*. 2010. Washington DC.
- Brantle, T.F. Survival and Proportionate Growth in Innovation: Firms and Cities, *Proceedings of the Northeast Decision Sciences (DSI) 2010 Annual Conference (NEDSI 2010)*. 2010. Washington DC.
- Brantle, T.F. The Competitive Network of Innovation, Complexity and Self Organization, *Proceedings of the 2nd International Society for Professional Innovation Management (ISPIM) Innovation Symposium - Stimulating Recovery - The Role of Innovation Management*. 2009. New York NY.
- Brantle, T.F. and Fallah M.H. Complex Knowledge Networks and Invention Collaboration. *Proceedings of the Sixth International Conference on Complex Systems (ICCS '06)*. 2006. Boston MA.
- Brantle, T.F. and Fallah M.H. Complex Innovation Networks, Patent Citations and Power Laws. *Proceedings of the Portland International Conference on Management of Engineering & Technology (PICMET '07)*. 2007. Portland OR.

Other Research – Draft Works in Progress

- Brantle, T.F. Scaling Variance of Growth Rates and Hierarchical Organization in Technological Innovation: Firms and Cities, 2024. DRAFT.
- Brantle, T.F. The Competitive Network of Innovation, Complexity and Economic Growth, 2024. DRAFT.
- Brantle, T.F. On Density and Densification in Social and Complex Networks, 2024. DRAFT.

Other publications

Telecommunications Industry Standards Publications (Bellcore – Public Domain)

- GR-199-CORE; *OTGR: Operations Application Messages – Memory Administration Messages*; Issue 3, December 1997; Issue 2, November 1996; Revision 1, December 1995; Issue 1, December 1994. [Editor and Co-author]
- GR-199-ILR; *OTGR: Operations Application Messages – Memory Administration Messages Issues List Report*; Issue 1E, June, 1996; Issue 1D, November 1995; Issue 1C, September 1995; Issue 1B, May 1995; Issue 1A, March 1995. [Author]
- GR-981-CORE; *OTGR: Service Configuration Management for Switching Network Elements (NEs)*, Issue 1, December 1996. [Author]
- GR-981-ILR; *OTGR: Generic Operations Interfaces Using OSI Tools: Configuration Management for Network Switching Elements Issues List Report*, Issue 1A, April 1996. [Author]
- GR-831-CORE; *OTGR: Operations Application Messages – Language for Operations Application Messages*, Issue 1, November 1996. [Editor and Co-author]
- GR-472-CORE; *OTGR: Network Element Configuration Management*, Issue 2, November 1996; Issue 1, July 1994. [Author]

- GR-472-ILR; *OTGR: Network Element Configuration Management Issues List Report*; Issue 1A, August 1996. [Author]
- GR-828-CORE; *OTGR: Generic Operations Interfaces – OSI Communications Architecture*; Revision 2, October 1996; Issue 1, September 1994. [Contributor]
- TR-NWT-000831; *OTGR: Operations Applications Messages – Language for Operations Applications Messages*; Revision 1, December 1993; Issue 3, July 1993; Issue 2, February 1988. [Editor and Co-author]
- TR-NWT-000199; *OTGR: Operations Application Messages – Memory Administration Messages*; Issue 3, December 1993; Issue 2, December 1992; Supplement 3, August 1992; Supplement 2, December 1991; Supplement 1, September 1990; Issue 1, February 1990. [Editor and Co-author]
- TA-NWT-000199; *Specification of Memory Administration Messages at the Operations System / Network Element (OS/NE) Interface*; Issue 7, December 1992; Supplement 2, August 1992; Supplement 1, June 1992; Issue 6, December 1991; Issue 5, December 1990. [Editor and Co-author]
- SR-NWT-002273; *Generic Interface Memory Administration Messages Conformance Test Cases for Switching Systems*; Issue 1, February 1992. [Author]
- TA-NWT-001129; *Advanced Intelligent Network (AIN) Release 1 Intelligent Peripheral (IP) Generic Requirements*, Issue 1, June 1991. [Co-author]
- TA-NWT-001123; *Advanced Intelligent Network (AIN) Release 1 Switching System Generic Requirements*, Issue 1, June 1991. [Co-author]
- SR-NWT-001823; *Advanced Intelligent Network (AIN) Release 1 Operations Applications (OA) Generic Requirements*, Issue 1, April 1991. [Co-author]
- TA-NWT-001182; *Advanced Intelligent Network (AIN) Release 1 Logical Data Model (LDM)*, Issue 1, June 1991. [Contributor]
- SR-NWT-001623; *Advanced Intelligent Network (AIN) Release 1 Network and Operations Plan*, Issue 1, June 1990. [Co-author]
- SR-TSY-001475; *Memory Administration Operations System (MAOS) Generic Requirements*, Issue 1, December 1989. [Editor and Co-author]
- SR-TSV-001174; *Next Generation Switch (NGS) Operations Strategy*, Issue 1, December 1988. [Editor and Co-author]
- TA-TSY-000301; *Public Packet Switched Network (PPSN) Generic Requirements*; Issue 2, May 1988; Supplement 1, March 1986; Issue 1, August 1985. [Co-author]
- TM-TSY-011785; *Next Generation Switch (NGS) Operations Technology Prospectus*, April 1988. [Co-author]
- TR-TSY-000874; *An Introduction to Bellcore's Reliability and Quality Generic Requirements (RQGR)*, Issue 1, April 1988. [Contributor]
- TR-TSV-000800; *Network Systems Generic Requirements (NSGR) Directory*, Issue 1, February 1988. [Editor and Co-author]
- TR-TSY-000439; *Operations Technology Generic Requirements (OTGR)*; Issue 2, February 1988; Issue 1, May 1987. [Editor and Co-author]
- TR-TSY-000474; *OTGR: Network Maintenance – Network Element*; Issue 2, February 1988; Issue 1, May 1987. [Co-author]
- TR-TSY-000481; *OTGR: Generic Operations Interfaces*; Issue 2, February 1988; Issue 1, May 1987. [Co-author]
- TR-TSY-000483; *OTGR: Embedded Operations Interfaces*; Issue 2, February 1988; Issue 1, May 1987. [Author]
- TR-TSY-000440; *Transport Systems Generic Requirements (TSGR)*, Issue 1, February 1988. [Contributor]
- TR-TSY-000499; *Transport Systems Generic Requirements (TSGR): Common Requirements*, Issue 1, January 1988. [Co-author]
- TA-TSY-000200; *Specification of System Maintenance Messages at the Operations Systems / Network Element (OS/NE) Interface*; Issue 3, September 1987; Issue 2, August 1986. [Contributor]
- TR-TSY-000064; *LSSGR – LATA Switching System Generic Requirements*; Issue 2, July 1987; Issue 1, December 1984. [Contributor]
- TR-TSY-000454; *OTGR: Documentation, Training and Supplier Support*; Issue 1, May 1987. [Co-author]

- SR-TSY-000700; *An Introduction and Overview of the Operations Technology Generic Requirements (OTGR)*, Issue 1, May 1987. [Author]
- SR-NPL-000628; *Operations Systems Strategic Plan (OSSP): Network Operations Process Reference*, Issue 1, December 1986. [Contributor]
- TR-TSY-000301; *Public Packet Switched Network (PPSN) Generic Requirements*, Issue 1, September 1986. [Co-author]
- TA-TSY-000422; *Summary of Interest Levels for Candidate Switching Features for Public Packet Switched Networks (PPSN)*, Issue 1, June 1986. [Co-author]
- SR-TSY-000495; *Description of a Bellcore Circuit Switching System Implementation Analysis*, Issue 1, May 1986. [Co-author]
- TM-TSY-002008; *Public Packet Switched Network (PPSN) Standard Operations Interfaces*, November 1985. [Author]
- SR-TSY-000331; *Description of a Bellcore Circuit Switching System Design Analysis*, Issue 1, November 1985. [Co-author]
- TM-TSY-002056; *Packet Switching Testing Plan – System Maintenance*, November 1985. [Author]
- TM-TSY-002057; *Packet Switching Testing Plan – Craft Interfaces*, November 1985. [Author]
- TM-TSY-002058; *Description of a Bellcore Circuit Switching System Design Analysis – Operations and Maintenance*, September 1985. [Author]

Legend:

- GR – Generic Requirements; CORE – Core Requirements; ILR – Issues List Report
 TA – Technical Advisory
 TM – Technical Memorandum
 TR – Technical Reference
 SR – Special Report

Belcore (Bell Communications Research) Corporate Reports (Proprietary)

- Special Report; *AT&T Local Number Portability (LNP) and Location Routing Number (LRN) Configuration Management System Requirements*, August 1997. [Co-author]
- Analysis Report; *NORTEL Super Node Data Manager (SDM) Operations Unbundling Opportunity Analysis*, August 1997. [Author]
- Special Report; *NORTEL DMS-100 GSF GR/TR-199 TL1 Memory Administration Issues Report*, October 1996. [Author]
- Special Report; *NORTEL DMS-100 GSF GR/TR-199 TL1 Memory Administration Interface Specification Analysis Report*, October 1996. [Author]
- Analysis Report; *Hewlett-Packard 55300A Primary Reference Source (PRS) TL1 Memory Administration Interface Message and Data Model Specification*, July 1996. [Author]
- Analysis Report; *Hewlett-Packard 55400A Timing Signal Generator (TSG) TL1 Memory Administration Interface Message and Data Model Specification*, July 1995. [Author]
- Technical Memorandum; Bellcore / Ericsson Operations Systems (OSs), November 1985. [Author]
- Technical Memorandum; Bellcore / CIT-Alcatel Operations Systems (OSs), July 1985. [Author]
- Analysis Report; GTE Digital Class 5 Electronic Automatic Exchange (GTD-5 EAX), Issue 1, April 1985. [Co-author]

General Motors Research Laboratories Corporate Reports (Proprietary)

- RM-59-52; *Implementing MINLODE at the GM Assembly Division Arlington, Fairfax, and Van Nuys Plants*, June 1983. [Co-author]
- TN-259; *MINLODE Savings Potential at Oldsmobile (For Distribution of B, C, and G Vehicles)*, April 1983. [Co-author]
- TN-256; *MINLODE at Buick: Initial Implementation Results*, January 1983. [Co-author]
- TN-254; *MINLODE Savings Potential at Buick*, November 1982. [Co-author]
- RM-59-45; *Time-In-System Variability at the Fischer Body Flint/Buick Assembly Plants*, August 1982. [Co-author]
- RM-59-54; *Estimated Car Division Savings from MINLODE at GM Assembly Division Plants*, August 1982. [Co-author]

- TN-245; *Impact of Carrier Operations on MINLODE's Potential to Reduce New Automobile Storage Requirements*, June 1982. [Author]
- TN-243; *Factors Affecting (Cadillac) Cimarron Distribution Times*, January 1982. [Co-author]
- TN-242; *Inventory and Delivery Costs Incurred While Distributing New Vehicles: Trade-Offs Based on Load Make-up Time*, January 1982. [Co-author]
- TN-237; *Inventory and Delivery Costs Incurred While Distributing New Vehicles: A Trade-Off Analysis*, August 1981. [Co-author]
- TN-234; *Using MINLODE to Reduce New Automobile Storage Requirements at GMAD's Tarrytown Plant*, August 1981. [Co-Author]
- TN-227; *Feasibility of MINLODE at the General Motors Assembly Division (GMAD) Tarrytown and Linden Plants*, June 1981. [Co-author]
- TN-225; *Simulating Assembly Plant Operations Affecting Vehicle Distribution*, May 1981. [Author]
- TN-219; *Feasibility of MINLODE at the General Motors Assembly Division (GMAD) Framingham Plant*, March 1981. [Co-author]
- TN-214; *Testing MINLODE, a Method of Assembly Sequencing to Reduce Vehicle Distribution Costs*, October 1980. [Co-author]
- TN-207; *Impacts of Assembly Sequencing on Vehicle Distribution Costs*, August 1980. [Co-author]
- RM-59-14; *Assembly Plant Operations at the General Motors Assembly Division (GMAD) Linden Plant*, June 1980. [Co-author]
- RM-59-13; *Assembly Plant Operations at the General Motors Assembly Division (GMAD) Willow Run Plant*, June 1980. [Co-author]
- RM-59-10; *Freight Transportation Project: Data Documentation*, November 1979. [Co-author]

Legend:

TN – Research Report

RM – Research Memorandum

ZHAOKUN CAI

156 Congress Street 1st floor, Jersey City, NJ 07307

Tel: 201-218-7956 Email: zcais@stevens.edu

Education

Stevens Institute of the Technology

Hoboken, NJ

Ph.D. candidate in Financial Engineering GPA:3.97/4.00

Expected May 2021

- Research in portfolio optimization and risk management

Stevens Institute of the Technology

Hoboken, NJ

Master of Financial Engineering GPA:3.97/4.00

Graduated May 2017

- Relevant courses: Stochastic Calculus for FE, Pricing and Hedging, Computational Methods in Finance, Introduction to Financial Risk Management, Portfolio Theory.

University of Science and Technology of China

Hefei, China

Bachelor of Mathematics and Applied Mathematics

Graduated Jun 2013

- Relevant courses: Mathematical modeling, C language programming, Optimization

Academic Research

- Research in ‘Meixner Process and application in optimal hedging Monte Carlo Simulation method’
- Research in ‘The nonlinear shrinkage portfolio and equivalent constrained optimization in Global Minimum Variance (GMV) portfolio’
- Research in ‘Eigen portfolio and eigen decomposition to improve the portfolio performance’

Statistics related Research

- The third author of ‘**Analysis of the SD model of low-carbon development in Chinese shipping industry under the background of international carbon emission market mechanisms**’ (Published in Journal of Shanghai Maritime University at 2015)
- The third author of ‘**Simulation Research of Transportation Energy Saving and Emission Reduction Technology Way Based on System Dynamics**’ (Published in Journal of Dalian Maritime University: Social Science Edition at 2015)

Teaching Experience

TA for Introduction to Financial Risk Management and Financial Enterprise risk management

TA and recitation instructor for Introduction to Stochastic Calculus for QF

TA and recitation instructor for Financial Time Series

Skills

Technology: Microsoft Office, R, Mathematica; basic knowledge in C++, Matlab, and Bloomberg.

Language: Native in Mandarin, Fluent in English

Qualification: FRM examination Level 1 passed (May 2016).

Zhiyu Cao

CONTACT INFORMATION

Email: zcao17@stevens.edu
Mobile Phone: (213) 275-9299
Address: 525 River St, Babbio Center
Hoboken, NJ, 07030

RESEARCH INTERESTS

Systemic Risk, Dynamic Financial Contagion, Financial Network, Deep Learning, Machine Learning, Fin-tech, Large Language Model, Financial Regulation

EDUCATION

School of Business, Stevens Institute of Technology

Ph.D. in Financial Engineering, May 2024

– Advisor: Dr. Zachary Feinstein

School of Engineering, University of Southern California

M.S. in Financial Engineering, May 2019

– Advisor: Dr. Petros Ioannou

School of Economics and Business Administration, Central China Normal University

B.A. in Financial Engineering, June 2017

School of Economics, Zhongnan University of Economics and Law

B.A. in Information and Computational Science minor, June 2017

PUBLICATIONS

Zhiyu Cao, Zihan Chen, Prerna Mishra, Hamed Amini, Zachary Feinstein. *Modeling Inverse Demand Function with Explainable Dual Neural Networks.*

- We introduced a novel dual neural network model to derive the inverse demand function from only partial market data. This innovative approach enables the skillful inference of obscured asset liquidations from observable initial shocks and final equilibrium asset prices, providing new insights into price-mediated contagion. This data-driven method contributes significantly to the field by enhancing the understanding and modeling of economic phenomena.
- Accepted and orally presented at the 4th ACM International Conference on AI in Finance (ICAIF 2023), NY, US.
- Presented at the American Mathematical Society Meeting, Buffalo, NY, US.

Zhiyu Cao, Zachary Feinstein. *Price-Mediated Contagion with Endogenous Market Liquidity.*

- We introduce a framework to understand price-mediated contagion in a system where the capacity of the market to absorb liquidated assets is determined endogenously. In doing so, we construct a joint clearing system for interbank payments, asset prices, and market liquidity. We establish mild assumptions which guarantee the existence of the greatest and least clearing solutions. We conclude with detailed numerical case studies which demonstrate the, potentially severe, repercussions of endogenizing the market liquidity on system risk.
- Under revision at Mathematics and Financial Economics

Zhiyu Cao, Zachary Feinstein. *Large Language Model in Financial Regulatory Interpretation*.

- We explore the innovative use of Large Language Models analytical tools for interpreting complex financial regulations. The primary objective is to design effective prompts that guide LLMs in distilling verbose and intricate regulatory texts, such as the Basel III capital requirement regulations, into a concise mathematical framework that can be subsequently translated into actionable code. This novel approach aims to streamline the implementation of regulatory mandates within the financial reporting and risk management systems of global banking institutions. A case study was conducted to assess the performance of various LLMs, demonstrating that GPT-4 outperforms other models in processing and collecting necessary information, as well as executing mathematical calculations. The case study utilized numerical simulations with asset holdings – including fixed income, equities, currency pairs, and commodities – to demonstrate how LLMs can effectively implement the Basel III capital adequacy
- Accepted at IEEE Symposium on Computational Intelligence in Finance and Economic Conference 2024 (CIFER 2024), Hoboken, New Jersey, US. 2024

WORKING PAPERS
& PROJECTS

- **Zhiyu Cao**, Zachary Feinstein. *Comparative Analysis of Graph Neural Networks and Traditional Neural Networks in Multi-Agent Systems for Systemic Risk*.
- **Center for Research toward Advancing Financial Technologies (National Science Foundation) Project: AI Compliance Officer** — Collaboration with PI: Zachary Feinstein.

AWARDS AND
GRANTS

2023–2024	Center for Research toward Advancing Financial Technologies (CRAFT) Scholarship School of Business, Stevens Institute of Technology.
2020–2023	Teaching Assistant Fellowship School of Business, Stevens Institute of Technology.
2017	Global Engineers Scholarship School of Engineering, University of Southern California.
2016	Outstanding Student Award Office of Academics, Central China Normal University.
2016	Boya Jingui Academic Scholarship (First-class Prize) Academic Affairs Office, Central China Normal University.

COURSE
INSTRUCTION

FE 511	Introduction to Bloomberg and Thomson-Reuters
FE 515	Introduction to R
QF 104	Data Management in R
QF 212	Advanced Probability and Stochastic Processes for Quantitative Finance

TEACHING
ASSISTANCE

FE 540	Probability Theory for Financial Engineering
FE 570	Market Microstructure Trading Strategy
QF 202	Financial Time Series
FE 550	Data Visualization Application
FE 590	Statistical Learning

INVITED
TALKS

Large Language Model in Financial Regulatory Interpretation, Stevens Finance Brownbag Sessions, Hoboken, U.S., April 2024.

Price-Mediated Contagion with Endogenous Market Liquidity, the 4th ACM International Conference on AI in Finance (ICAIF 2023), New York, U.S., November 2023.

Price-Mediated Contagion with Endogenous Market Liquidity, the Fall Eastern Sectional Meeting of the American Mathematical Society, Buffalo, U.S. September 2023.

MEMBERSHIP

IEEE Member

ACM - Association for Computing Machinery Member

WORKING
EXPERIENCE

Stevens Institute of Technology, Hoboken, NJ

Course Instructor

- FE 511: Introduction to Bloomberg and Thomson-Reuters
- FE 515: Introduction to R
 - Master's Core Course
 - Students' course evaluation score: 4.83/5.0
- QF 104: Data Management in R
- QF 212: Advanced Probability and Stochastic Processes for Quantitative Finance
 - Undergraduate Core Course
 - Students' course evaluation score: 4.5/5.0

Teaching Assistant

- FE 540: Probability Theory for Financial Engineering
- FE 570: Market Microstructure Trading Strategy
- QF 202: Financial Time Series
- FE 550: Data Visualization Application
- FE 590: Statistical Learning

Institute of Software, Chinese Academy of Sciences, Beijing, China

Dynamic Index Updates of Moving Taxi

- We develop a real-time system for tracking and updating moving taxis, using GPS and advanced algorithms to enhance urban transport efficiency.
- The system predicts taxi positions, analyzes traffic and demand patterns using machine learning.
- It prioritizes data privacy while aiming to reduce congestion and improve service quality in urban transportation.

RELEVANT
SKILLS

- Programming and Machine Learning:
 - Python: Highly experienced in data analysis and web mining, demonstrating proficiency in developing complex algorithms and managing large-scale data sets.
 - R: Specialized in statistical analysis and data visualization, with a strong emphasis on delivering insightful and actionable findings.
 - MATLAB: Proficient in mathematical modeling and algorithmic development.
- Software:
 - Bloomberg: Experienced in financial data analysis and tracking market trends.
 - Tableau: Expert in creating interactive dashboards and visual analytics.
 - SPSS: Used for statistical analysis and predictive modeling.

REFERENCES

Dr. Zachary Feinstein, Assistant Professor and Director of the Fintech Certificate Program, School of Business, Stevens Institute of Technology, zfeinste@stevens.edu

JING CHEN

9279 riverside station blvd, Secaucus, NJ 07094

☎ 315-396-5888 ✉ arya.jchen@gmail.com 🌐 <https://www.linkedin.com/in/jing-chen777/>

Education

Stevens Institute of Technology | Ph.D. in Data Science, GPA: 3.9 **Hoboken, NJ – Present**
Syracuse University | M.S. in Applied Statistics, GPA: 3.6 **Syracuse, NY – May, 2019**
Lanzhou Jiaotong University | B.S. in Business Administration, GPA: 3.5 **Lanzhou, China – June, 2016**

Coursework

- Machine Learning
- Natural Language Processing
- Deep Learning
- Artificial Intelligence
- Big Data Technologies
- Marketing Analytics

Skills

Python, PyTorch, TensorFlow, SQL, Excel, SAS, R, Power BI, Azure, AWS, Apache Hive, SPSS

Work Experience

Microsoft Corporation **July 2019 – Feb 2021**
Data Scientist Contractor *Seattle, WA*

- Worked with stakeholders to formulate business problems. Applied Machine Learning methods to analyze user behaviors in answers.microsoft.com. Calculated evaluation metrics and utilized prediction values for targeting and reporting.
- Collected customer segments, established prototypes, and designed dashboards for analyzing M365 template subscription. Cooperated in AB test design, and supported internal search engine operation and improvement.
- Explored Big Data on cutting-edge cloud technologies. Consolidated unstructured data and bridged them from diverse sources to create new insight and facilitate the work of teams. Visualized the model result that connects traffic data with customer features to understand the impact of marketing touchpoints from the customer level.
- Interacted with teams across the organization to solve their analytics need, onboard new data sources, build knowledge trust and promote data-driven solutions.

Sina Weibo (NASDAQ: WB) **June 2018 – Sep 2018**
Data Scientist Intern *Beijing, China*

- Took full responsibility for researching algorithms, establishing prototypes, and creating visualized dashboards. Collaborated with multiple stakeholders to agree on use cases in the project.
- Collected 5M+ user data entries from Apache Hive, transferred the raw data into Python and performed data cleansing tasks, which included handling missing values and identifying fake accounts based on user features.
- Implemented statistical modeling to gain insights from customer demographics and various behavioral patterns.
- Proposed algorithms to automatically target potential customers for the new product “Fandom” which launched in 2018.

China Development Bank (Gansu Branch) **July 2016 – June 2017**
Financial Analyst *Lanzhou, China*

- Engaged in customer communication and conducted the collection, organization, and categorization of financial data.
- Analyzed customer demographics, preferences, and purchase history to identify potential use cases for personalized recommendations by using Excel & R, according to the bank’s customer stratification principles.
- Monitored and analyzed sentiment analysis to assess the attitudes associated with a product/service experienced by its customers. Developed and applied marketing strategy for customer segments to the actual product promotion process.

Projects

Hospitalization Rates Forecasting with Heterogeneous Transfer Learning **Jun 2023**

- Proposed a novel framework using heterogeneous transfer learning to predict early-stage hospitalization rates, which outperformed state-of-the-art benchmarks by up to 3.6% in RMSE across various lead time of ground truth.
- Provided valuable statistical evidence and support to enhance the sustainability of healthcare systems.
- Leveraged correlation tests to demonstrate the significant correlation between COVID-19 cases and hospitalizations.
- Adopted multimodal data learning methods to learn the impact of news sentiment and semantic features on hospitalization to interpret non-traditional variation patterns.

Emerging Pandemic Forecasting with Multimodal Data Analysis **May 2022**

- Proposed a novel framework for forecasting emerging pandemics at an early stage, significantly surpassing state-of-the-art baselines by up to 6.8% in terms of RMSE, across various lead times of ground truth.
- Adopted Graph Neural Network based model to learn historical time-series patterns in a dynamic propagation process.

- Designed transfer learning architecture to learn general patterns of existing diseases for new pandemic prediction.
- Designed a multimodal learning module to analyze the impact of news sentiment and semantic features on epidemic transmission. Improved accuracy by up to 21.8% in terms of RMSE with a 14-day lead time.

German Credit Scoring Data Classification and Prediction

April 2019

- Used K-fold cross-validation to split the dataset into training data and testing data for fitting the model.
- Applied the lasso regression, ridge regression, decision tree, and random forest to predict and classify the credit scoring.
- Calculated confusion matrix to compare the model performance. The decision tree has better calibration and prediction because of higher sensitivity and higher specificity. Predicted the credit risk of new clients based on model results.

How Income and Education Affect Health Status

May 2017

- Gathered raw data from the Minnesota Population Center website and imported it into Python for data cleaning and missing value handling. Provided a description of data statistics and generated relevant charts.
- Built a logistic regression model and performed diagnostics for multicollinearity and outliers.
- Concluded that a positive relationship exists between educational attainment, income, and health status.

Publication

- Chen J, Creamer GG, Ning Y, Ben-Zvi T. Healthcare Sustainability: Hospitalization Rate Forecasting with Transfer Learning and Location-Aware News Analysis. *Sustainability*. 2023 Nov 10; 15(22):15840.
- J. Chen, G. Creamer, and Y. Ning. Forecasting Emerging Pandemics with Transfer Learning and Location-aware News Analysis. *2022 IEEE International Conference on Big Data (IEEE BigData)*. Osaka, Japan, 2022
- Nanxu Chen, Dongqing Sun, and Jing Chen. 2022. Digital transformation, labour share, and industrial heterogeneity. *Journal of Innovation and Knowledge*. Volume 7, Issue 2, 2022.
- Dongqing Sun, Fanzhi Wang, Nanxu Chen, and Jing Chen. 2021. The Impacts of Technology Shocks on Sustainable Development from the Perspective of Energy Structure—A DSGE Model Approach. *Sustainability*. Volume 13, 2021.

JING CHEN

9279 riverside station blvd, Secaucus, NJ 07094

☎ 315-396-5888 ✉ arya.jchen@gmail.com 🌐 <https://www.linkedin.com/in/jing-chen777/>

Education

Stevens Institute of Technology | Ph.D. in Data Science, GPA: 3.9 **Hoboken, NJ – Present**
Syracuse University | M.S. in Applied Statistics, GPA: 3.6 **Syracuse, NY – May, 2019**
Lanzhou Jiaotong University | B.S. in Business Administration, GPA: 3.5 **Lanzhou, China – June, 2016**

Coursework

- Machine Learning
- Natural Language Processing
- Deep Learning
- Artificial Intelligence
- Big Data Technologies
- Marketing Analytics

Skills

Python, PyTorch, TensorFlow, SQL, Excel, SAS, R, Power BI, Azure, AWS, Apache Hive, SPSS

Work Experience

Microsoft Corporation **July 2019 – Feb 2021**
Data Scientist Contractor *Seattle, WA*

- Worked with stakeholders to formulate business problems. Applied Machine Learning methods to analyze user behaviors in answers.microsoft.com. Calculated evaluation metrics and utilized prediction values for targeting and reporting.
- Collected customer segments, established prototypes, and designed dashboards for analyzing M365 template subscription. Cooperated in AB test design, and supported internal search engine operation and improvement.
- Explored Big Data on cutting-edge cloud technologies. Consolidated unstructured data and bridged them from diverse sources to create new insight and facilitate the work of teams. Visualized the model result that connects traffic data with customer features to understand the impact of marketing touchpoints from the customer level.
- Interacted with teams across the organization to solve their analytics need, onboard new data sources, build knowledge trust and promote data-driven solutions.

Sina Weibo (NASDAQ: WB) **June 2018 – Sep 2018**
Data Scientist Intern *Beijing, China*

- Took full responsibility for researching algorithms, establishing prototypes, and creating visualized dashboards. Collaborated with multiple stakeholders to agree on use cases in the project.
- Collected 5M+ user data entries from Apache Hive, transferred the raw data into Python and performed data cleansing tasks, which included handling missing values and identifying fake accounts based on user features.
- Implemented statistical modeling to gain insights from customer demographics and various behavioral patterns.
- Proposed algorithms to automatically target potential customers for the new product “Fandom” which launched in 2018.

China Development Bank (Gansu Branch) **July 2016 – June 2017**
Financial Analyst *Lanzhou, China*

- Engaged in customer communication and conducted the collection, organization, and categorization of financial data.
- Analyzed customer demographics, preferences, and purchase history to identify potential use cases for personalized recommendations by using Excel & R, according to the bank’s customer stratification principles.
- Monitored and analyzed sentiment analysis to assess the attitudes associated with a product/service experienced by its customers. Developed and applied marketing strategy for customer segments to the actual product promotion process.

Projects

Hospitalization Rates Forecasting with Heterogeneous Transfer Learning **Jun 2023**

- Proposed a novel framework using heterogeneous transfer learning to predict early-stage hospitalization rates, which outperformed state-of-the-art benchmarks by up to 3.6% in RMSE across various lead time of ground truth.
- Provided valuable statistical evidence and support to enhance the sustainability of healthcare systems.
- Leveraged correlation tests to demonstrate the significant correlation between COVID-19 cases and hospitalizations.
- Adopted multimodal data learning methods to learn the impact of news sentiment and semantic features on hospitalization to interpret non-traditional variation patterns.

Emerging Pandemic Forecasting with Multimodal Data Analysis **May 2022**

- Proposed a novel framework for forecasting emerging pandemics at an early stage, significantly surpassing state-of-the-art baselines by up to 6.8% in terms of RMSE, across various lead times of ground truth.
- Adopted Graph Neural Network based model to learn historical time-series patterns in a dynamic propagation process.

- Designed transfer learning architecture to learn general patterns of existing diseases for new pandemic prediction.
- Designed a multimodal learning module to analyze the impact of news sentiment and semantic features on epidemic transmission. Improved accuracy by up to 21.8% in terms of RMSE with a 14-day lead time.

German Credit Scoring Data Classification and Prediction

April 2019

- Used K-fold cross-validation to split the dataset into training data and testing data for fitting the model.
- Applied the lasso regression, ridge regression, decision tree, and random forest to predict and classify the credit scoring.
- Calculated confusion matrix to compare the model performance. The decision tree has better calibration and prediction because of higher sensitivity and higher specificity. Predicted the credit risk of new clients based on model results.

How Income and Education Affect Health Status

May 2017

- Gathered raw data from the Minnesota Population Center website and imported it into Python for data cleaning and missing value handling. Provided a description of data statistics and generated relevant charts.
- Built a logistic regression model and performed diagnostics for multicollinearity and outliers.
- Concluded that a positive relationship exists between educational attainment, income, and health status.

Publication

- Chen J, Creamer GG, Ning Y, Ben-Zvi T. Healthcare Sustainability: Hospitalization Rate Forecasting with Transfer Learning and Location-Aware News Analysis. *Sustainability*. 2023 Nov 10; 15(22):15840.
- J. Chen, G. Creamer, and Y. Ning. Forecasting Emerging Pandemics with Transfer Learning and Location-aware News Analysis. *2022 IEEE International Conference on Big Data (IEEE BigData)*. Osaka, Japan, 2022
- Nanxu Chen, Dongqing Sun, and Jing Chen. 2022. Digital transformation, labour share, and industrial heterogeneity. *Journal of Innovation and Knowledge*. Volume 7, Issue 2, 2022.
- Dongqing Sun, Fanzhi Wang, Nanxu Chen, and Jing Chen. 2021. The Impacts of Technology Shocks on Sustainable Development from the Perspective of Energy Structure—A DSGE Model Approach. *Sustainability*. Volume 13, 2021.

Zhi Chen

📍 Hoboken, NJ | 📞 (551) 998-5065 | ✉️ zchen100@stevens.edu

🌐 [linkedin.com/in/zhichen2288/](https://www.linkedin.com/in/zhichen2288/) | 🌐 zhi-chen.info

EDUCATION

- Stevens Institute of Technology** 08/2021 - Present
Doctor of Philosophy in Financial Engineering Hoboken, NJ
- Stevens Institute of Technology** 08/2019 - 05/2021
Master of Science in Financial Engineering (GPA: 3.9) Hoboken, NJ
- Guangzhou University** 09/2013 – 06/2017
Bachelor of Science in Physics Guangzhou, China
Bachelor of Science in Finance
- Honors: Scholarship, Excellent Student for Support Education, Excellent League Member

PROFESSIONAL EXPERIENCE

- Research Assistant | Machine Learning in Credit Risk Project** 08/2021 - Present
Stevens Institute of Technology & UBS Hoboken, NJ
- Implemented ARMA, GARCH models to analyze time-series financial dataset
 - Optimized Machine Learning, Deep Neural Network techniques to assess and predict corporate credit ratings
 - Adopted NLP methods to transform textual financial reports (10-k) into a numeric vector as additional features
 - Designed Explainable AI (XAI) algorithms to provide interpretation for "Black Box" of machine learning and offer recommendation for companies to improve credit ratings
- Data Analyst | Management Curriculum for The Digital Era Project - Macude.org** 05/2020 – 08/2020
Stevens Institute of Technology, PwC & AACSB Hoboken, NJ
- Communicated with global task force leaders for strategies, analytic methods, and data collection
 - Collaborated with 9 global teams to implement web mining techniques to automatically collect discipline metadata
 - Utilized NLP methods in Named Entity Recognition (NER) task and relevant information extraction task
 - Built a Siamese Neural Network to compare similarity between two text materials
- Teaching Assistant | Courses Tutorial** 02/2020 - Present
Stevens Institute of Technology Hoboken, NJ
- Skilled in and afforded guidance for courses: Deep Learning and Business Applications, Advanced Time Series Analytic and Machine Learning, Stochastic Calculus, Portfolio Theory and Applications, Financial Risk Management
- Bid Specialist | Property Management** 07/2017 – 07/2018
Guangzhou Kaiwu Property Management Co., Ltd Guangzhou, China
- Compiled tender documents, supervised bidding process, designed online system and database
- High School Physics Teacher** 09/2016 – 12/2016
Guangzhou high School Guangzhou, China
- Coached 200+ students for physics lessons, demonstrated physics experiments

PUBLICATION

- Wang, Dan, Zhi Chen, and Ionut Florescu. "A Sparsity Algorithm with Applications to Corporate Credit Rating." arXiv preprint arXiv:2107.10306 (2021)
- Guang Liu, Zhi Chen, and Hejian Liu. "An analysis of security return based on one-dimensional asymmetric Square Well." Journal of Guangzhou University (Natural Science edition) 17.3 (2018): 11-16

LEADERSHIP EXPERIENCE

- Product Manager** 12/2017 – 06/2018
"Internet +" - Information Technology Service Innovation and Entrepreneurship Competition

SKILLS

- **Programming Languages:** Python (Advanced), R, C++, SQL, Bloomberg, LaTeX, Tableau
- **Certifications:** National Senior Teacher Certification, Certificate of Accounting profession of P.R. China
- **Languages:** English, Mandarin, Cantonese

Zihan Chen

CONTACT INFORMATION	Email: zchen61@stevens.edu Mobile Phone: (201) 680-1738 Address: 29 Hancock Ave Jersey City, NJ 07307
RESEARCH INTERESTS	Time Series Analysis, Natural Language Processing, Deep Learning Models, Graph Embeddings, Social Network Analysis
EDUCATION	School of Business, Stevens Institute of Technology Ph.D. Student, Business Administration (expected May 2024) <ul style="list-style-type: none">• Advisor: Dr. Feng Mai• Concentration: Information Systems and Analytics• GPA: 3.8/4 School of Business, Stevens Institute of Technology M.S. in Business Intelligence and Analytics, May 2019 <ul style="list-style-type: none">• Concentration: Data Science• GPA: 4.0/4 School of Economics, Shandong University B.A. in Economics, June 2016 <ul style="list-style-type: none">• Concentration: International Economics and Trade
PUBLICATIONS	Feng Mai, Zihan Chen, and Aron Lindberg. <i>Does Sleep Deprivation Cause Online Incivility? Evidence from a Natural Experiment.</i> (ICIS 2019)
WORKING PAPERS	Zihan Chen, Rong Liu, Feng Mai, and Xuying Zhao. <i>Leveraging Clickstream Data for Sales Forecasting: A Deep Learning Approach with Graph-based Learning.</i> Zihan Chen, and Feng Mai. <i>Proactive Incivility Detection in Online Communities: A Link Prediction Approach.</i>
AWARDS AND GRANTS	2019–2024 Provost Doctoral Fellowship School of Business, Stevens Institute of Technology 2020 Ph.D. Student Conference Fellowship School of Business, Stevens Institute of Technology
TEACHING ASSISTANCE	BIA 652 Multivariate Data Analytics BIA 658 Social Network Analytics MIS 630 Data Management MIS 637 Data Analytics and Machine Learning MIS 636 Data Warehousing and Business Intelligence CS 561 Database Management Systems
REVIEWER	2021 International Conference on Information Systems (ICIS) 2020 International Conference on Information Systems (ICIS)

CONFERENCE TALKS	<i>The Dark Side of Social Media</i> , 2019 International Conference on Information Systems Conference, Munich, Germany. (Dec 2019)		
MEMBERSHIP	AIS - Association for Information Systems Member		
RELEVANT SKILLS	Programming:	Python, R, MySQL, MATLAB, HTML, SAS	
	Software:	Tableau, SAS JMP, Gephi, SPSS, Stata, Excel VBA	
	Language:	English, Mandarin Chinese	
WORKING EXPERIENCE	2019–presesnt	Research Assistant	Stevens Institute of Technology
	2017–2019	Teaching Assistant	Stevens Institute of Technology
	2015-2016	Data Analyst Intern	Jiangxi Yijiying E-Commerce Ltd.
REFERENCES	Dr. Feng Mai , Assistant Professor, School of Business, Stevens Institute of Technology, (201) 216-3815, fmai@stevens.edu		

DONNA G. CHLOPAK, PhD

1 Claridge Drive PH-14
Verona, New Jersey 07044

(H) 973.239.0065; (C) 973.699.3936
dchlopak4@gmail.com

PRJ = 0 Other PR = 0

An Industrial/Organizational Psychologist with extensive corporate and consulting experience in Management and Marketing. I currently use my education and work background to support students' need for experiential learning and to support their career development activities. My book, Learning to Fish in the Twenty-First Century – Navigating the Career Waters to Find and Land a Choice Position - pub 5/2016, 6/2021.

TEACHING INTERESTS

Project Management	Management Skills
Organizational Theory/Behavior	Human Resources Management
Leadership	Social Science/Marketing Research Methods
Compensation Management	Career Development
Consumer Behavior	Marketing Strategy and Management
Advertising and Promotion	Principles of Marketing/Services Marketing
Product Development	Principles of Management

Article submitted to *Police Quarterly: Unconventional and External Police Misconduct Investigation Processes: Police Officer Perceptions of Fundamental Fairness.*

Business Reactions – Marketing/Management Consultancy **2009-present**

Independent consultant providing support for both students entering the job market and mid-career individuals looking for their next position, and working with entrepreneurs in need of management and marketing support. I help clients develop an understanding of target market needs for products/services. I have worked with organizations in technology, retail, hospitality, financial services and other business service sectors. I am known for bringing a unique perspective on understanding customers and clients.

- **Employee/Customer Engagement** –bottom line impact on business growth
 - assessing levels of employee engagement/empowerment
 - impact of employee engagement on the entire supply chain management flow
 - creating means to improve both employee and customer perceptions and bottom-line business
 - assessing levels of customer satisfaction/engagement
 - dollarizing the impact of engaged customers
 - developing intervention strategies to drive improved customer engagement

Certified Consultant with SimuRise Learning Pvt. Ltd, India **2023- present**

I utilize Accelium's Game Based Learning activities, which are AI powered, to train students and employees in areas of Planning, Project Management, Strategic Decision Making, Problem Solving, Flexible Thinking, Change Management, and Team Management.

PROFESSIONAL EXPERIENCE Adjunct Faculty – (various courses: both graduate and undergraduate) 2010-present

Seton Hall, School of Business: team teaching cornerstone Marketing and Management MBA course; Undergraduate Organizational Behavior, Principles of Management, Project Management (current)

Stevens Institute of Technology, Graduate School of Management: Organizational Theory and Behavior and Project Management (2010-current)

William Paterson University – undergraduate Organizational Behavior, Leadership (2021-current)

Caldwell University: Human Resources, Principles of Management (2019-2020, 2021)

Montclair State: Principles of Management, Organizational Behavior (2014-2016) full time/instructional specialist Business Communications (2016-2019)

Kean University, Department of Management and Marketing: Career Development, Management, Organizational Behavior, Human Resources & Capstone Course (2010-2015)

Rutgers University, Management, Marketing Sciences & Supply Chain MGT: Management Skills, New Product Management, Marketing Research. (2010-2014)

Gallup Consulting: Principal Engagement Manager, Regional Coordinator 1995-2009

Entrusted to manage diverse, global, public and private sector client engagements in all practice areas. Disciplines, including: Customer & Employee Engagement, Selection, Strengths Development, Market Research, Leadership Assessment and Succession

Planning. Position interfaced with all phases of the client engagement:

Sales: to understand client needs, develop proposals and provide basis for client contracts.

Operations: to ensure contract terms are met: deliverables satisfied on time, accurately.

Clients: to ensure that all clients' needs are understood, the Statement of Work conditions met and all changes addressed, managed up to \$16 million in revenue per year. **Matrix**

Management: coordinate expectations of the Clients and all internal teams.

Orchestrated tripling of single client revenue: US assessment (of less than \$3 M to a global engagement (above \$9 M annually) after understanding overall business needs, designing a solution assessing their position and developing interventions to improve customer engagement.

Repositioned struggling international project through strong leadership and integrated global team: solution fulfilled client needs and increased account revenue.

Selected to trouble shoot concerns of client loss. Ensuring turnaround and continued profitable business of key accounts.

Developed deep relationships with multiple client contacts –leading to account growth, recommendations to new prospects and called upon when contacts changed firms.

As Regional Coordinator managed a group of professionals including, Chief Practice Scientist, Engagement Managers, Senior Consultants, Strategic Consultants, Performance Outcome Specialists, Analysts and Statisticians. My group was among the most engaged on each of Gallup's semi-annual ratings of Employee Engagement and I was frequently recognized for this accomplishment.

Reactions, Inc/Business Reactions:

President –Marketing/Management Consulting Firm

1991-1995

Independent consultant working with consortium of other professionals to help clients understand customer needs for products/services. Worked with clients in the technology and business services sectors. Often won new business due to the unique perspective of focus on understanding the targeted customer.

Key Accomplishments:

Led consumer testing of design elements for Minitel's Bill & Pay system for on-line bill paying which is a proto-type for current internet bill paying in the industry

Syndicated Interactive TV study: Developed assessment to model business opportunities from both adult and child perspective. Worked with consortia of consultants on product development and business case to aid key industry leaders' consideration of ongoing efforts to bring concepts to market.

Citibank, NA: Vice President

1985-1991

National Marketing and New York Retail Bank –

1989-1991

Assessed special programs and banking delivery opportunities: Bank at Work, Student Offerings, Affluent Market. Produced business cases for programs to determine both the fiscal desirability and implementation needs so that viable programs could be developed.

Development Division – The Lab

1985-1989

Managed professional team, including psychologists, sociologists, human factors scientists, technologists and marketing executives to assess the bank's new product and technology offerings for both customer acceptance and usability.

Key Accomplishments:

Conducted research and developed business case which led to new product offering for the New York Retail Bank – Bank at Work

Led the testing of ATM and other technology offerings to ensure they were user friendly and met customer needs which continued to keep Citibank in the forefront of Automated Banking Services – at the time, 70% of Citibank customers used ATMs while less than 50% of competitor bank customers used their ATMs.

AT&T: Staff Manager

1981-1985

Consumer Marketing –

1983-1985

Managed a million-dollar cluster marketing test to drive long distance selection. Test identified eleven different targets for messaging through direct mail and telemarketing. The

test was successful and yielded a significant improvement in consumers selecting AT&T. Also developed a technique to aid in the selection of new product names, used in the naming of several new business products

Market Research and Forecasting— 1981-1983
Researched product offerings to assist in tariff filings. Determined business customer desires for various 800 and 900 services.

ADDITIONAL TEACHING EXPERIENCE:

Seton Hall University: Adjunct Assistant Professor Management
1981-present

Teach graduate and undergraduate courses in Organizational Behavior, Management, Compensation, and Marketing Research.

Baruch College, CUNY: Assistant Professor Marketing 1979-1981

Taught graduate and undergraduate courses in Marketing Management, Research and Advertising. Advised MBA students.

Seton Hall University: Assistant Professor Marketing and Management 1976-1979

Taught graduate and undergraduate courses in Marketing Management, Consumer Behavior, Marketing Research, Organizational Behavior, Management, and Compensation.

EDUCATION

PhD, Industrial/Organizational Psychology, Ohio State University
(Minor in Consumer Behavior)

MA, Industrial/Organizational Psychology, Ohio State University
BA, Psychology, Douglass College, Rutgers University

Matthew Crane, DBA, ASA, CPA
(845) 219-0477
mcrane201@outlook.com
Jersey City, NJ

Pracademic with significant industry and teaching experience with publications seeking a full-time teaching position. Specialization in finance includes fair value accounting, business valuation, and financial analysis.

Education

D.B.A. Sacred Heart University, Doctorate in Finance. Fairfield, CT.
M.S. Taxation. Bentley University. Waltham, MA.
M.B.A. Suffolk University. Boston, MA. (Accounting Concentration).
B.A. Binghamton University, Liberal Arts. Binghamton, NY.

Current Teaching Experience – Adjunct Professor

2019-Present Stevens Institute of Technology. Hoboken, NJ. Financial Decision Making. FIN 515.
Learning Management System: Canvas. Teaching experience both Online and In Person.

Current Professional Certifications

- Certified Public Accountant, State of New York. License 094036.
- American Society of Appraiser, Accredited Senior Appraiser (ASA) – Appraisal Review (AR), Business Valuation (BV), Intangible Assets (IA), and Machinery & Technical Specialty (MTS).
- Financial Modeling & Valuation Analyst (FMVA), Corporate Finance Institute.

Research and Teaching Interests

- Forensic Accounting;
- Valuation and Capital Markets;
- Financial Analysis and Managerial Accounting.

Presentations

2017 What It's Worth: Valuing Electrical Contracting Companies. Crane, M. Hollis, E. Business Valuation Resources Guidebook based upon a Webinar presented July 2017,
2016 Introduction to Business Valuation Part I, Half-day interactive panel discussion with applications 100th American Accounting Association National Conference, August 2016, New York, NY. Crane, M., DiGabriele, J., Lohrey, P., Pannese, D. Russo, C.

Professional Experience

2021 - 2023 Engagement Leader. Empire Valuation Consultants. New York, NY.

- Valuation of privately and publicly held entities for financial reporting and tax purposes.

2020 – 2021 Valuation Manager. CFGI, Inc. New York, NY.

- Valuation of privately and publicly held entities for financial reporting purposes.

2018 - 2021 Managing Director. MSG. New York, NY

- Valuation of privately held entities for litigation support.
- Perform forensic accounting assignments for litigation purposes.

2014 – 2018 Director of Financial Valuation. Marshall & Stevens, Inc. New York, NY.

- Valuation of privately and publicly held entities for financial reporting (purchase price allocations, stock compensation, asset impairment, litigation, tax and other).
- Fairness and Solvency Opinions for public and private companies.
- Defense of appraisals during audits, court, and arbitration proceedings.

1990 – 2014 Appraiser/Valuation Specialist at International and Regional Accounting and Consulting Firms (RSM and others), Consulting Practices.

- Plan and perform audits regarding fair value issues.
- Memorable assignments include the forensic investigation and valuation of intangible wireless acquired by WorldCom for its emergence from bankruptcy.

1986-1990 Significant prior work experience as Accountant, Auditor, Controller, Tax Manager and in Banking, Public Accounting and Solid Waste Industries.

Publications

Crane, M. Valuation Problems: Is it a Lack of Marketability or Just Fuzzy Math, Massachusetts Lawyers Weekly, November 12, 2002.

Crane, M. and Dyson, B. Risks in Applying the New Business Combination Guidance to Intangible Assets. The CPA Journal, January 2009.

Crane, M. and Levy, M. Fair Valuation of Trade Claims. Business Valuation Review, Vol. 28 No. 4, December 2009.

Crane, M. and Dyson, B. Estimated the Fair Value of Investments in Entities That Calculate Net Value Per Share. The Journal of Accountancy, March 2011.

Crane, M. What Sets the Value of Your Construction Firm? Construction News, June 2013.

Crane, M. The Cost Approach May be the Best for Construction Firms – Here’s Why. Business Valuation Update, Vol. 21 No. 3 March 2015.

Crane, M. Challenges and Common Errors in Valuing Electrical Contractors. Business Valuation Update Presentation, Vol. 23 No. 9 September 2017

Crane, M. A Reflection on Low Risk-Free Interest Rates. Business Valuation Update, Vol. 23 No. 12 December 2017.

Crane, M. (Dissertation). The Legend of Weighted Average Return on Assets and Benchmarking Purchase Price Allocation Data. Journal of Forensic and Investigative Accounting. Volume 11: Issue 1, January–June 2019.

Crane, M. Academic Review – Guest Editor. Value Examiner. National Association of Certified Valuation Analysts. May/June 2019.

Crane, M. DiGabriele, J., Lohrey, P., Nicholson, J. VFR Valuation Advisory #3: A Groundwork for Fraudulent Financial Reporting? Journal of Forensic and Investigative Accounting. Volume 11: Issue 3, July-December 2019.

References

Dr. Peter Lohrey, Phd	poacjac77@gmail.com	(973) 655-3514
Nicholas Tzoumas, ASA	ntzoumas@cioninvestments.com	(646) 845-2590
Kevin McElroy, ASA, CPA/ABV	kmac10016@yahoo.com	(646) 630-8399

Memberships

- Former President, American Society of Appraisers, New York City Chapter.
- Member, Appraisal Issue Task Force, Subgroup of the Appraisal Foundation.
- Member, American Legion.

Michelle Crilly

5507 Vermella Way

Lyndhurst, NJ 07071

Cell: (201) 315-2624 E-mail: mcrilly01@gmail.com

PROFESSIONAL EXPERIENCE

Stevens Institute of Technology, Hoboken, NJ

September 2010 – Present

Assistant Dean of Student Success School of Business (September 2021 – Present)

- Manage the Center for Student Success (CSS) which is now the *de facto advising model* used by the University
- Oversee all graduate and undergraduate academic advising
 - On average the CSS solves approximately 5,500 student issues per academic year
- Manage a team of 5
- Responsible for ongoing monitoring of all UG retention with specific focus on freshmen retention and 6th year graduation rate
- Active member of the Dean's Council, UCC, SSB Program Director's Committee, Academic Advising Council, Graduate Student Success Committee Academic Leadership Council, Student Facing Committee, Workday Operations Committee and SSB Board of Advisors
- Aggressively monitor 4th and 5th year graduation "watch" students to ensure the likelihood of graduating within 6 years
- SSB representative to the Commencement Committee and chief architect of the inaugural Naming Ceremony for the School

Director - School of Business Center for Student Success (September 2017 – May 2021)

- Implemented the Student Event Management System that allows for data gathering on student issues handled by the Center.
- Drafted a comprehensive freshman and 6th year graduation retention plan
- Devised and implemented a plan to identify "at risk" students and ensure corrective measures are taken, expanding the Risk Based Advising Model
- Designed a freshman peer mentor program which pairs freshman with upper-classman to assist them throughout their freshman year
- Created a Freshman Syllabus that details the role of different school advisors, what to expect freshman year and where to go for assistance
- Implemented summer pre-freshman programs aimed at making meaningful, early connections with our incoming freshman
- Created development shells on CANVAS for both undergraduate and graduate student
- Extended advising hours to include "after hour" online advising to give greater flexibility to student needs
- Create mid-year and annual State of the Center for Student Success report to be presented to the Dean
- Appointed by the Dean to represent the interests of the School of Business on the Provost's Staff Committee

Manager – School of Business Student and Faculty Support Center (September 2013 – September 2017)

- Created the Student and Faculty Support Center
- Started a highly successful Student and Faculty Ambassador program at both the graduate and undergraduate level, whereby top students and faculty are selected to serve as Ambassadors for Admissions events and other perspective student outreach
- Worked closely with FBLA (*Future Business Leaders of America*) and attended annual national and state conferences. Presented two workshops to approximately 400 students and advisors
- Forged a partnership with Junior Achievement – held three conferences for student leaders
- Created and advisor to both UG and graduate Stevens Women in Business Club
- Align closely with admissions to attend and assist in coordination of visit days and accepted student events

- Led and organized annual Trading Day event consisting of over 100 participants
- Responsible for the Center for Student Success fiscal budget

Director - Business Intensive Summer Program (July 2012 – Present)

- Coordinate faculty and schedule all academic sessions
- Guide students during nightly academic sessions and teach three modules on Management
- Organize and chaperone a “business safari” day which includes field trips to NYC
- Conduct follow-up sessions and analyze program success by administering surveys to participants

Coordinator - Undergraduate Business Programs (September 2010 – September 2013)

- Responsible for creating class schedule for all UG business majors
- Assisted with instructor assignment
- Worked with Registrar for all scheduling matters
- Provided administrative duties to all SSB faculty

Riverside Realty, Hoboken NJ

July 2007 – September 2010

Realtor / Sales Associate

Crown Counsel Victim Services, Burnaby BC,

July 1996 – August 2002

Supervising Caseworker

- Maintained a heavy caseload, supervised a team of 21
- Assisted in launching a province wide governmental database

Interim Director (2001-2002)

- Managed all staff and operations for a region consisting of seven cities

TEACHING EXPERIENCE

Stevens Institute of Technology, Hoboken, NJ

Adjunct Professor

September 2016 – Present

- Teach BT353 Project Management to college students of various years and majors

Business Intensive Summer Program

July 2012 - Present

- Teach three sessions of Management and oversee evening research projects to rising high-school seniors participating in the Business Intensive Summer program

Like a Boss

January 2016 – January 2019

- Teach one session of Management to rising high-school seniors participating in the Like a Boss event

Hoboken Board of Education, Hoboken NJ

September 2009 – September 2010

Substitute Teacher – NJ board certified

CONFERENCE PRESENTATIONS

Crilly, M. 2017. Leaders are Made Not Born – Here’s how! *Presented at the Future Leaders of America Conference (Anaheim, CA)*

Crilly, M. 2018. Leveraging Technology for Success. *Presented at the Future Leaders of America Conference (Baltimore, MD)*

EDUCATION

Stevens Institute of Technology; Hoboken, NJ

- **Master of Science in Management – May 2015**

Simon Fraser University; Burnaby BC

- **Bachelor of Arts – major in Criminology, May 1996**
- **Dean’s Honor List**

MEMBERSHIPS

National Academic Advising Association (NACADA)

September 2017 – Present

TECHNOLOGY SKILLS

SIS, Salesforce, Microsoft Office (Excel, PowerPoint, Access, Project, Word), Workday, Slate, Tableau, Ducksuccess

Khasha Dehnad**4 Taylor Run * Holmdel, NJ 07733****Cell: 732-895-1024 Business: 732-357-6600****Email kdehnad.aims@gmail.com Website: <http://www.aimsinfo.com>****Summary of Experience and Qualifications**

- Extensive experience in business, strategic and operational analytics
- Application of marketing analytics, data sciences, data mining, information systems, and operations research principles to a broad spectrum of business issues in pharmaceutical, financial services, telecommunications and retail industries
- Strong business and management credentials and experience leading, teaching and driving results
- Extensive product expertise in leading edge technologies: e.g. SAS, R, Blockchain, Big Data
- Broad experience managing data warehousing and executive support system design/implementation (architecture, logical design, ETL, data quality, operations research, statistical analysis)
- Extensive experience developing full cycle business intelligence solutions and infrastructures
- Analysis focused on marketing, CRM, financial, and operational strategies and solutions

Project Examples Academic/Industry Collaborations and Competitions

- Wiley Publishing: Machine Learning in IT Ops (AIOPs)
- Multiple small business marketing strategies, evaluations and planning
- ShopRite/Wakefern: Campaign management and price sensitivity of three lines of business
- Teradata Universe 2018: Modeling of victim-offender relationships (One of Top 10 Invitees/Presenters)
- L'Oréal: Employee attrition prevention analysis
- Pittsburg Food Hall: Formulation of multimillion dollar marketing strategies for restaurant conglomerate
- Panera Bread: Formulation of marketing strategy for "food delivery" division of Panera
- Google AdWord Competition: Formulation of AdWords for nonprofit (runner up), profit oriented (top 3%)

Project Examples by Industry**Pharmaceuticals** (Wolters Kluwer, Organon USA, Market Measures and Medco)

- Design and implementation of longitudinal patient and managed market analytics (Treatment Path, Source of Business, Early Adaptors, Direct to Consumer Campaign) for various pharmaceutical clients.
- Sales resource and promotion optimization.
-
- Sales force alignment, effectiveness, incentive compensation, and field reporting.
- SAS warehouse and analytical system in support of Business Analytics.
- Pharmaceutical forecasting and goal setting methodology and system.
- Market research system to analyze and forecast product consumption within Medicaid/Medicare MMI
- Direct Marketing and Campaign Management infrastructure and data warehouse for prescription drug-benefit marketing programs
- Online scoring model for identifying cross-selling opportunities
- Analytics and database marketing system for customer acquisition, retention and segmentation
- Forecasting system for customer web site usage

Financial Services (Citigroup and MBNA)

- Market segmentation of credit card customers (decision tree)
- Forecasting models for credit card expenditures using ARIMA and High Performance Forecasting/HPF)
- Demographic/geographic data warehouse for customer analysis and modeling
- Optimization system for allocating direct marketing resources to various marketing channels
- Cardholder demographic database using census data

Securities and Investment Services (including, Merrill Lynch and DTCC)

- Blockchain architecture and prototype for Market Design

- Revenue assignment system for calculating revenue generation by brokerage offices
- Goal Management EIS for managing corporate goals (featured in *SAS Communication*)
- Pricing system for 700,000 fixed income securities (Munis, MBS and ABS))
- Call and put option-forecasting system
- Debit cap/credit risk management system
- Settlement transaction reversal/chaining - - optimization system for eliminating intra-day exposure
- Customer satisfaction surveys and multivariate analyses
- Money Market Instrument index (implemented by Federal Reserve)

Telecommunications (AT&T)

- International circuit optimization and cost savings reporting system
- WorkForce Management (WFM) and optimization system for scheduling call-center employees

Employment History

- Applied Information and Management Sciences Inc. (AIMS Consulting) 01/1995 - Present
President and Founder
- Wolters Kluwer Pharma Solutions 07/2008 – 01/2012
Principal, Custom Analytics
- Organon USA (Part of Schering Plough) 01/2007 – 06/2008
Associate Director, Performance Metrics
- Depository Trust & Clearing Corporation 07/1986 - 03/1997
Director, Research & Development; Manager, Decision Support and EIS
- Armstrong University - Director of Academic Computing 09/1983 - 07/1986
- Independent Consulting 01/1981 - 08/1983

Academic Employment

- Stevens Institute of Technology - Adjunct Professor 09/2009 – Present
BIA and Computer Science: Blockchain Technology, Data Mining, Optimization, Marketing Analytics, Multivariate Statistics, R & SAS Bootcamps
- Columbia University - Adjunct Professor 09/2008 – 12/2008
Forecasting
- New Jersey Institute of Technology - Adjunct Professor: 09/1988 – 01/2002
Operations Research, Project Management, Statistics, MIS

Academic Background

Blockchain Instructor Certificates Training	IBM	08/2018
University of California at Berkeley	MS Operations Research	06/1981
University of San Francisco	MBA Management	12/1979
Tehran University	BS Chemical Engineering	06/1976

Presentations and Publications

- AI, Machine Learning and Deep Learning Textbook (in progress) 06/2020
- SAS Global Forum 2012 Formation of Optimum ACOs Leveraging SAS®/OR 04/2012
- INFORMS Marketing Science A Framework for Formulating Pharma Marketing 06/2008
- Pharma Management Science Assoc. (PMSA) Analysis, Decision, Actions & Results 04/2008
- North East Teradata Users Group ETL: Faster Than You Think 11/2003
- Securities-Industry-Glossary Pricing Strategy Paper 09/1996
- SAS Conference for Investment Analysis Fixed Income Valuation 07/1995
- EIS Institute Conference Criteria for the Selection of EIS Software 09/1993
- SAS European User Group Object Oriented Methodologies for System Development 06/1993

- SUGI Executive Program Implementing an Executive Information System 05/1993
- IBM Analytical Computing Conference Creating Cycles of Security Swaps 02/1990

APPENDIX – INDUSTRY ENGAGEMENT

KD

Khasha Dehnad

Tue 2/11/2020 6:04 PM

• Edward A Stohr

☒

Hello Ted,
Please see the answers below.

1. What percentage of your time is currently involved in PART-TIME or FULL-TIME EMPLOYMENT in industry or government? 35% (my consulting business)
2. Over the last 5 years, what percentage of your time was involved in PART-TIME or FULL-TIME EMPLOYMENT in industry or government? 20% to 35% 35% (my consulting business)
3. What percentage of your time is currently involved in CONSULTING for Industry or government? 35%
4. Over the last 5 years, what percentage of your time was involved in CONSULTING for industry, government? 20% to 35%

Best regards,
Khasha Dehnad

KOSROW DEHNAD

9 HONEYSUCKLE COURT • HOLMDEL, NJ 07733

PHONE: 732.890.5757

e-mail: kd11@columbia.edu

EDUCATION

Stanford University	Ph.D., Applied Statistics
University of California, Berkeley	Ph.D., Mathematics Mary and Jacob Zeits Scholarship
	M.A., Statistics
Victoria University of Manchester	M.A., Mathematics
	B.Sc., Mathematics First Class Honors

PROFESSIONAL EXPERIENCE

New York Institute and Laboratory for AI (NYILAI) 
Director August 2021 – Present

Columbia University  1996-Present

Adjunct Professor of Operations Research & Financial Engineering

- Teaching courses in Simulation, Forecasting, Applied Financial Engineering, and the application of operations research techniques to Finance and Marketing, Finance and Structuring for Data Scientists

New York University  2016-Present

Adjunct Professor of Finance and Risk Engineering

- Teaching courses in News Analytic, Structuring, Alternative Investments, A Modern Approach to Value Investing

Concord Advice (a FinTech Company) June 2017 – Nov. 2018

Director of Analytic and Chief Data Scientist

- In charge of all aspects of developing models to underwrite loans
- Developing predictive models base on data from bureaus such as Trans Union and Experian
- Mining census data and borrowers' information for market segmentation and forecasting borrower behavior to optimize various aspects of lending

Saudi American Bank (SAMBA Financial Group) April 2008 – December 2016
Assistant General Manager

- Head of Analytic Group and Quantitative Trading, in charge of studying and resolving valuation and pricing issues arising from trading, hedging, and risk managing of various instruments, structures, and trading positions.
- Managing a proprietary quantitative trading book. Developing, implementing, and improving trading algorithms.
- Treasury Credit Officer in charge of calculating credit risk of various structures and determining their potential loss in case of adverse market movements. Determining their appropriateness for counterparties.
- Participating in client calls as subject matter expert. Designing and structuring hedges and investments for corporations and investors.
- Co-Head of Hedge Fund Group in charge of selecting and investing in Hedge Funds based on their strategies and performance and investment parameters such as expected return, VaR, and diversification. Managing all the legal, regulatory, and monitoring aspects of such investments.

Citigroup **2006 – March 2008**
Managing Director, Structured Credit

- Head of Exotic Credit Trading and Structuring, overseeing trading and risk management of Exotic Book. Products ranged from Perfect Asset Swap to synthetic callable bonds on basket of credits.
- Developed a long-short strategy that combined information from equity and credit markets. Also, created a number of innovative structures in areas of insurance, management of credit risk of energy swaps, and efficient mitigation of credit risk of loan portfolios. Citigroup has filed preliminary patent application for two of these structures regarding creation of futures contracts for managing credit risk of interest rate swaps.

Citigroup **2002 – 2006**
Managing Director, Global Portfolio Optimization

- Co-head of the team that developed and implemented the methodology for dynamically managing credit risk of interest rate derivatives.
- Developed the mathematical foundation of managing credit risk of swaps under unilateral conditions in the case of bankruptcy. Was involved and directed all aspects of the project from mathematical research and model building; system development; determination of risk limits; to discussions with regulators.
- Developed new approaches to managing bank's loan portfolio using accounting friendly structures with minimal impact on banks' relationship with borrowers. Created and designed a model to value loans and their imbedded options. Developed the strategy for managing loan portfolios during different phases of business cycles.

Citigroup **1998 – 2002**
Managing Director, Interest Rate Derivatives and Structuring

- Global head of Structuring and New Products Development. Led the team that designed derivatives solutions for corporations, financial institutions, and internal customers such as a securitization group to efficiently achieve various financial objectives.

- Worked with commodity derivatives to develop a “Real Option” framework for energy projects.

Citicorp **1994 – 1998**

Vice President, Interest Rate Derivatives

- Global head of Hybrid Products Trading and Structuring. Led the team that developed and traded multi-asset correlation products such as interest rate caps with jet fuel triggers tailored for the airline industry.
- Created structures such as the semi-fixed swap, Mulligan Cap, and the Double Zero swap.

Chase Manhattan Bank **1990 – 1994**

Vice President, Derivatives Marketing

- Developed hedging strategies and derivatives solutions for banks and insurance companies.
- Developed the first path dependent structured derivatives products such as the Q-Cap, Adjustable Strike Cap, N-Cap, and Self-Funding Cap.

D.E. Shaw **1989 – 1990**

Associate

- Designed trading algorithms for stock index arbitrage.
- Studied the question of hedging the residuals of a basket in incomplete index trades.
- Programmed in C, S, and Awk in a Unix environment- this firm was one of the pioneers of program trading.

AT&T Bell Laboratories **1984 – 1989**

Member of Technical Staff

- Expert in Robust Design and Taguchi’s Method.
- Researched the foundation of Robust Design.
- Received the AT&T Exceptional Contribution Award.

ACADEMIC EXPERIENCE

Prince Sultan University (Riyadh, Saudi Arabia)

Adjunct Professor of Finance

- Teaching MBA courses in Corporate Finance, Investment Management and Portfolio Theory, Financial Risk Management.

Rutgers University **1987 – 1989**

Adjunct Professor of Statistics

- Teaching courses in Regression Analysis, Applied Multivariate Analysis, and Modern Methods of Quality Control.

PUBLICATIONS

- Recent Publications:

- “*Optimal Business Model for Financial Institutions under Dodd-Frank and Post-Crisis Regulatory Environment*”
 - “*Behavioral Finance and Technical Analysis*,” 2011, Journal of Financial Transformation, Vol.32
 - “*A Model of Formation of Asset Bubbles*,” September 2010 issue of Journal of Financial Transformation
 - “*A Model of Formation of Asset Bubbles*,” September 2010 issue of Journal of Financial Transformation
 - “*A Stitch in time ...*,” a chapter in the book “Operational Control in Asset Management, Processes and Costs” that was published in November of 2010
 - “*Money Voices: Why Quants Are Set for a Resurgence*” An OpEd that was published in January issue of FundFire, an online publication of Financial Times for Hedge Funds.
 - I was interviewed by American Bankers for an article in their June 2010 issue entitled “*Financial 'Supermarket' Idea Re-Emerges, in Humbler Form.*” The article refers to a paper of mine with the title of “*The Myth of Financial Supermarket, or Why CITI's Business Model has not and will not Work*” that was published in 2009 issue of The Journal of Financial Transformation.
-
- I have researched and published in other fields, e.g., the article “*A Simple Way to Improve the Login Security*” that has been published in the Journal of Computer & Security; or the piece “*Long Term Capital, a case of 'Prisoner's Dilemma'*” that has been published in the RISK magazine.
 - I have Published a book entitled “*Quality Control, Robust Design, and the Taguchi Method*,” Wadsworth.
 - The book “*Blockchain Investor Manual*,” 2020

LILIANA E. DELMAN

❖ Jersey City, NJ ❖ (707) 292-0413 ❖ lilianadelman@gmail.com ❖ [linkedin.com/in/lilianadelman/](https://www.linkedin.com/in/lilianadelman/)

EDUCATION

- Miami University, Oxford, OH** **May 2015**
 Master of Science, Student Affairs in Higher Education
 Concentration: Diversity, Equity, & Culture
- Smith College, Northampton, MA** **May 2011**
 Bachelor of Arts, American Studies & Urban Studies
 Concentration: Intersections of Race and Gender in American Social Movements

LEADERSHIP & DIVERSITY AWARDS

- Diversity Leadership Award, *Stevens Institute of Technology*, April 2021
 Outstanding Contribution Award, *Stevens Institute of Technology*, August 2020
 Tiger Service Award, *Colorado College*, July 2017
 Student Recognition Award: Senior Survey, *Colorado College*, October 2016, 2017, 2018
 Helping Hands Award, *Colorado College*, May 2016
 Excellence in Leadership Award, *Smith College*, May 2011
 Outstanding Social Justice Programming Award, *Smith College*, May 2010

RELEVANT EXPERIENCE

Director - Office of Diversity, Equity & Inclusion

January 2022 - Present

Assistant Director for Diversity Education

March 2019 - January 2022

Division of Student Affairs

Stevens Institute of Technology, Hoboken, NJ

- Promoted to inaugural Director of the new Office of Diversity, Equity and Inclusion in under 3 years after exceeding expectations and providing outstanding contributions to the University
- Serve as a diversity, equity and inclusion (DEI) subject-matter expert for students, faculty, and staff
- Advise 26 student organizations, including all cultural, LGBTQ+, religious and identity-based professional organizations, including the Student Government Association's Diversity & Inclusion Committee
- Develop, advertise, execute, and assess workshops and trainings focused on diversity, social identity development, cultural competence, intersectionality, allyship and related topics for the Stevens community
- Lead the campus-wide Safe Zone Ally Training Program, serving as lead Safe Zone facilitator and raising overall awareness of LGBTQ inclusion practices at the University
- Create, lead and assess 3 new initiatives: the Social Justice in STEM Dialogue Series, the Diversity, Equity & Inclusion Facilitators Training Program and the Inclusion Reps Program
- Oversee the Lore-El Center for Women's Leadership, the hub for programs supporting women in STEM
- Plan, oversee and assess the biennial LeadHERship Conference, including chairing the planning committee, selecting educational workshops and keynote speakers, and managing a budget and donor gifts of over \$35,000
- Hire, train and supervise the Graduate Coordinator of Diversity Initiatives and 8 student staff
- Collaborate with University partners to enhance, develop and implement employee professional development opportunities regarding diversity and inclusion best practices
- Guide the Athletics Department in all DEI initiatives and implementation of best practices as the Athletics Diversity and Inclusion Designee (ADID) to the NCAA
- Serve as an advocate for students regarding their navigation of institutional concerns related to inclusive housing, name, gender, and pronoun changes, academics, etc.
- Manage all marketing and information campaigns related to DEI (Bias Reporting, 50th Anniversary of Title IX, 50th Anniversary of Women at Stevens, Juneteenth, Ramadan, and more)
- Maintain and track the expenditures and combined budgets of over \$50,000

Coordinator of Mentoring & Diversity Initiatives

The Butler Center

July 2015 - March 2019

Colorado College, Colorado Springs, CO

- Researched, developed, facilitated and assessed workshops for students, staff and faculty from various departments on campus (microaggressions, cultural appropriation, bias, LGBTQ allyship, privilege, and more)
- Advised 9 student organizations (multicultural, LGBTQ, international, learning differences and more) oversaw leadership development for 18 student co-chairs, manage fiscal planning and assist with events and retreats
- Provided holistic advising to students who identify as first-generation, international, low-income, and people of color for comprehensive student success
- Developed a new comprehensive peer mentoring program, the S.A.I.L. Mentoring Program (Sophomore Advanced Initiative for Leadership), to support sophomore success and retention
 - Supervised and trained 20 Peer Leaders and meet 1:1 with 30 sophomores for regular check-ins
 - Implemented over 15 unique educational workshops on financial literacy, career preparation, self-care, cross-cultural communication, leadership skills and more
 - Assessed program through surveys and interviews and wrote reports based on learning outcomes
 - Advised the Sophomore Class Committee, oversaw programming to support all sophomore students
- Served as Lead Consultant to leaders of all student organizations affiliated with the Butler Center, whose missions align with the principles of social justice), provide ongoing leadership development workshops and foster a spirit of collaboration amongst leaders
- Collaborated with various partner offices to create innovative large-scale programming during New Student Orientation and throughout the year, including History & Heritage Months, Community Gatherings, Pride Luncheon, Annual Awards Banquet and International Education Week
- Provided insight and advice to individuals and departments to increase their work around equity and inclusion
- Managed combined programs budget of over \$6,000

Diversity Affairs Practicum Student

Office of Diversity Affairs

August 2014 - May 2015

Miami University, Oxford, OH

- Training Coordinator for the “Let’s Talk Dialogue Series”
 - Trained staff, undergraduates and graduate students to facilitate intergroup dialogues on topics of inclusion, current events, and identity for the campus community
 - Redesigned dialogue facilitator curriculum, improving education on social identities and co-facilitation
 - Promoted cross-cultural understanding through self-reflection activities and intentional dialogues
- Co-Chair of the Inaugural Multicultural Student Leadership Conference
 - Advised planning of new 2-day conference, promoting diverse student leadership and multiculturalism
 - Co-led meetings for planning committee of 8 students and 2 professional staff members
 - Reviewed proposal submissions, led pre-conference workshops, and created post-conference assessment

Graduate Resident Director

Office of Residence Life

July 2013 - May 2015

Miami University, Oxford, OH

- Managed a newly-constructed residence hall with 262 students and 2 Living Learning Communities
- Supervised 8 RAs, including hiring, ongoing training, leadership development, and professional evaluation
- Advised Community Leadership Team of 26 members, mentored student president and guided committees
- Provided crisis response as 24-hour on-call representative to various situations (suicidal ideation, sexual assault, intimate partner violence, student death, substance abuse, etc.), collaborating with emergency services, deans, families and university counsel
- Created annual assessments and reports on all programming, student learning outcomes, and retention
- Co-led study abroad trip of 30 sophomore students to Belgium, Luxembourg, Switzerland, and Italy for 6 weeks; developed cross-cultural pre-departure curriculum
- Organized and led 5-day cultural immersion trip to Washington, D.C. for 44 sophomore students to engage in meaningful service-learning, dialogues and multicultural exploration, oversaw \$18,000 budget

PUBLICATIONS

- Freeman, T., **Delman, L.** & Tetley, J. (2019) Sophomore Programs at Colorado College. *Aligning Institutional Support for Student Success: Case Studies of Sophomore-Year Initiatives*. National Resource Center for The First-Year Experience & Students in Transition.
- Magolda, P., & **Delman, L.** (2016). Campus Custodians in the Corporate University: Castes, Crossing Borders, and Critical Consciousness. *Anthropology & Education Quarterly*, 47(3), 246-263.
- Magolda, P. M., & **Delman, L.** (2014). [Review of the book *Facilitating the moral growth of college students*]. *Journal of College Student Character*, 15(1), 55-58.

REGIONAL & NATIONAL CONFERENCE PRESENTATIONS

- **Delman, L.**, & Guedes, K. (2021, December) *System-Thinking: Introducing Anti-Racist Leadership into STEM Education*. Presented at the NASPA Multicultural Institute, New Orleans, LA.
- **Delman, L.**, & Paprocka, V. (2019, October) *Overlooked & Underutilized: How to Harness the Power of Introverts*. Presented at the NASPA Region II Careers in Student Affairs Conference, New York, NY.
- **Delman, L.** (2018, May) *Building a Mentoring Program for Holistic Sophomore Success*. Presented at the NACADA Region 6 Conference, Minneapolis, MN.
- **Delman, L.**, & Stevens, S. (2017, November) *Creative Programming through Collaboration: Strengths & identities*. Presented at the Collegiate Career Services Association Fall 2017 Meeting, Denver, CO.
- **Delman, L.**, & Williams, B.M. (2016, February) *From #activism to @llyship: Supporting student advocacy in the 21st century*. Presented at the College Personnel Association of Colorado Annual Conference, Denver, CO.
- Magolda, P.M., & **Delman, L.** (2015, March). *Student affairs and campus custodians: Partners in enacting a social justice agenda*. Paper presented at the annual meeting of ACPA – College Student Educators International, Tampa, Florida.
- Magolda, P.M., & **Delman, L.E.** (2014, November). “You must have done something wrong”: *Campus custodians and the corporate university*. Paper presented at the annual meeting of the Association for the Study of Higher Education, Washington, DC.
- **Delman, L.E.**, & Brooks, S. (2014, October). *Ninety-nine problems: Utilizing your strengths to resolve and manage conflict*. Presented at the Miami University Annual Perlmutter Leadership Conference, Oxford, OH.
- Magolda, P.M., & **Delman, L.E.** (2014, March). *Campus custodians: Unsanitized tales about residential life & the changing university*. Paper presented at the annual meeting of the American College Personnel Association, Indianapolis, IN.

COMMITTEE INVOLVEMENT

- Student Affairs Diversity, Equity & Inclusion Committee - Chair, *Stevens Institute of Technology*, 2020-2021
- 1st Gen Ducks Committee - Chair, *Stevens Institute of Technology*, 2019-present
- Student Affairs Staff Development Committee, *Stevens Institute of Technology*, 2019-2020
- Sophomore Experience linkCommittee, *Colorado College*, 2017-2019
- Accessibility Resources Student Leadership Council, *Colorado College*, 2017-2018
- Collaboration, Communication and Difficult Conversations Work Group, *Colorado College*, 2016
- Sexual and Interpersonal Violence Prevention & Response Committee, *Miami University*, 2014-2015

PROFESSIONAL DEVELOPMENT & CERTIFICATIONS

- Certified as Title IX Investigator, *Stevens Institute of Technology*, 2021
- Diversity, Equity & Inclusion in the Workplace Certificate, 2021
- Certificate in Excel@CC “Understanding Our Students”, “Great Communicator”, and “Good to Great: The Journey to Inclusion” *Colorado College*, 2015, 2017, 2018
- Certified as Mental Health Ally, *Miami University*, 2015
- Trained as StrengthsQuest workshop facilitator, *Miami University*, 2014

Zhiyang (Zayn) Deng

(323) 327-6867 zdeng10@stevens.edu Jersey City, NJ, 07307 [in](#)Zhiyang Deng [LinkedIn](#)

EDUCATION

STEVENS INSTITUTE OF TECHNOLOGY *Hoboken, NJ* Aug 2020 – Jan 2025 (expected)

Ph.D Candidate in Financial Engineering GPA: 3.86/4.00

Selected Courses: Convex/Stochastic Optimization, Stochastic Processes, Theoretical Statistics, Econometrics, C++ & Algorithm

Activities: Lecturer (Python in Financial Application, Bloomberg), TA (Stochastic Calculus, Computational Methods in Finance)

Website: <https://scholar.google.com/citations?user=JuLlgnUAAAAJ>

UNIVERSITY OF SOUTHERN CALIFORNIA (USC) *Los Angeles, CA* May 2020

M.S. in Financial Mathematics GPA: 3.91/4.00

Selected Courses: Stochastic Calculus, Stochastic Differential Equations & Control Theory, Numerical PDEs, Asset Pricing

NANCHANG UNIVERSITY *Nanchang, China* June 2016

B.S. in Mathematics and Applied Mathematics

PUBLICATIONS

- **Z. Deng**, et al, Fine-Tuning Large Language Models using Data Fusion in Financial Applications, accepted by IJCAI 2024
- **Z. Deng**, et al, FinCon: A Synthesized LLM Multi-Agent System with Conceptual Verbal Reinforcement for Enhanced Financial Decision Making (under review), Neurips 2024
- Q. Xie,...**Z. Deng**, et al, The FinBen: An Holistic Financial Benchmark for LLMs (under review) , Neurips 2024
- **Z. Deng**, Z. Cui, et al, Quantum Method on Crypto Arbitrage Opportunities Detection (oral presentation), LMDE 2023

EXPERIENCE

RBC Capital Markets *New York, NY* June 2023 – Aug 2023

Core Quants Summer Associate, Manager: Jay Yao

- Developed fast risk algorithm for calibrated IR LGM model to elaborate its sensitivity to market perturbation, especially the shift of both SABR model parameters and yield curve.
- Ensured algorithm output accuracy with an error percentage below 1% for SABR parameter risks (vol, Rho, Nu) and below 3% for yield curve Delta risk (validated results via 10-year Bermudan swaptions).
- Reduced time complexity from $\mathcal{O}(N^{1.6})$ to $\mathcal{O}(N \log N)$, greatly enhancing efficiency compared to the original “bump-ravel” algorithm (involving re-calibration), and successfully implemented the algorithm in the RBC Felix system using C++.

Arc Capital *Remote, US* June 2022 – Sep 2022

Quantitative Developer Summer Intern, Manager: Eileen Zhou

- Developed deep reinforcement learning model (with double deep Q-Network) to improve the profitability of trading strategy on gold commodity (200% higher than the accumulate return of buy&hold strategy on testing dataset), and the training dataset contains 6-Month one-minute tick data of gold price and retail investors information.

USC, Department of Mathematics *Los Angeles, CA* Jul 2019 – Dec 2019

Research Assistant, Supervisor: Dr. Ricardo Mancera

- Approximated realized volatility (for intraday returns) of S&P 500 index via MSRV estimator, and estimated parameters of Heston model by using pseudo maximum likelihood estimation.
- Utilized exponential stochastic volatility model (combining with realized and implied vols estimators) for volatility forecasting.

China International Capital Corporation (CICC) *Shanghai, China* Oct 2017 – Dec 2017

Asset Management Intern, Supervisor: Dr. Hanqing Zhao

- Back-tested a Calendar Spread Arbitrage trading strategy on 5-year treasury bond futures & a MACD trading strategy on 8 kinds of commodity futures, and developed comprehensive research reports.

RESEARCH

A McKean-Vlasov type Principal-Agent Problem Feb 2024 – Present

On working with Liwei Huang, Dr. Zhenyu Cui, Dr. Ibrahim Ekren

- Build optimal contract theory under McKean-Vlasov type optimal control assumptions.
- Derive the corresponding HJB-FP PDE systems of risk-averse principal-agent problem under distortion risk measures, e.g. conditional value at risk (CVaR)

Mean Field Games under Dynamic Risk Measures via g -Expectation Feb 2024 – Present

On working with Dr. Mathieu Laurière

- Derive HJB-FP PDEs system and forward backward SDEs system of mean field games under time-consistent dynamic risk measures via g -expectation.
- Provide well-posedness results of two systems: existence and uniqueness.

- Give an example of linear quadratic MFG under time-inconsistent dynamic risk measure.

Reinforcement Learning Algorithms of Risk-averse Mean Field Games

Nov 2023 – Present

On working with Dr. Mathieu Laurière and Dr. Deepanshu Vasal

- Develop a policy gradient algorithm and a Q-learning algorithm of discrete time mean field games under Markov risk measures.
- Extend sequential decomposition techniques (work from Dr. Vasal) to discrete time MFGs with exponential cost.

PROJECTS

Sentiment Analysis & Portfolio Optimization (Python)

Nov 2021 – Dec 2021

- Designed and implemented a trading strategy on 10 different stocks selected from S&P500 index based on sentiment analysis data (from Sentdex API) with a Sharpe ratio of 1.41 & max drawdown of 11.81%, against the benchmark – mean-variance portfolio with shrinkage estimator on the same 10 stocks (with a Sharpe ratio of 0.71 & max drawdown of 23.33%).

Credit Card Fraud Detection (Python)

Oct 2021 – Dec 2021

- Implemented logistic algorithms on the Kaggle dataset (see link) & applied SMOTE, ADASYN random sampling methods to decrease imbalance effect and to improve algorithm accuracy rate (e.g. the accuracy has been improved from 58.16% to 92.86% under Precision-Recall curve).

SKILLS

Statistics: Time Series Analysis, Monte Carlo, Bayesian Inference (basic).

ML/DL/RL: Regression, Tree-based Model, Robust PCA, CNNs, Diffusion Model, DQN, Actor-Critic, PPO, TRPO, SAC

Technical Skills: C++, Python(Pandas, NumPy, Matplotlib, SciPy, PyTorch), \LaTeX , MATLAB(CVX), Git/GitHub.

AWARDS

Provost Doctoral Fellowship, Stevens Institute of Technology

Aug 2020

Outstanding Graduate, Nanchang University

May 2016



Dr. R. Richard Dool

2 Meadowlark Court ♦ Flemington, New Jersey ♦ (C) 908-627-2600 ♦ rdool@earthlink.net

www.linkedin.com/in/richard-dool

PROFESSOR, RESEACHER, AUTHOR, GRADUATE DIRECTOR, DISSERTATION CHAIR, THESIS ADVISOR, ONLINE ADVOCATE

- ♦ **University teaching since 2002**
- ♦ **Active Researcher/Author**
- ♦ **Online Program Development & Leadership, Teaching since 2003**
- ♦ **Dissertation Chair & Member (60+)**
- ♦ **Thesis Advisor (100+)**
- ♦ **Graduate Program Development & Leadership**

♦ ACADEMIC EXPERIENCE ♦

Rutgers University	New Brunswick, New Jersey	School of Communication and Information Director – Masters Programs Teaching Professor (2016 -)
Seton Hall University	South Orange, New Jersey	College of Communication and the Arts Director – Graduate Studies (2007 – 2016) Associate Professor (2002 – 2016)
University of Maryland (GC)	Adelphi, Maryland	Graduate Business Department (2003 – 2020) Associate Adjunct Professor
Adjunct Experience (TESU, ACU, Stevens Institute of Technology, TCNJ, Adams State, Saint Leo, and others)		Undergraduate and Graduate: On-Campus and Online (2002 – 2020)

♦ EDUCATION ♦

University of Maryland (UC)	Adelphi, Maryland	Doctorate in Management/Org. Processes (2006) Phi Kappa Phi Honor Society, Magna Cum Laude
Thomas Edison State University	Trenton, New Jersey	MS, Management (2003) Summa Cum Laude
Seton Hall University	South Orange, New Jersey	MA, Strategic Communications and Leadership (2002) Summa Cum Laude / Valedictorian
Fordham University	Bronx, New York	BA, Political Science and Public Administration (1978)

Certificates:

Seton Hall University	South Orange, New Jersey	Certificate in Servant Leadership (2021)
University of Maryland	College Park, Maryland	Certificate in Agile Leadership Principles & Practices (2020)

Doane University	Crete, Nebraska	Certificate in Strategic Leadership in Healthcare (2020)
Babson College	Wellesley, Massachusetts	Certificate in Conscious Capitalism (2020)
SDA Bocconi School of Management	Milan, Italy	Certificate in International Leadership and Organizational Behavior (2020)
Rutgers University	Newark, New Jersey.	Certificate in Corporate Social Responsibility (2019)
MIT	Boston, Massachusetts	Certificate in Leading Organizations and Change (2017)
University of California	Irvine, California	Certificate in Intercultural Communication and Conflict Resolution (2016)
IE Business School	Madrid, Spain	Certificate in Critical Perspectives on Management (2016)
University of Wisconsin	Madison, Wisconsin	Professional Certificate in Online Education (2015)
Yale University	New Haven, Connecticut	Certificate in Leading and Managing Globally (2015)

◆ PUBLICATIONS AND PRESENTATIONS ◆

Books:

Dool, R. & Beal, M. (2022). *The Purpose Generation: Leading GenZ with Purpose*. Seattle: Kindle Direct Publishing.

Dool, R. & Alam, T. (2022). *Change Fatigue™ Revisited: Leading Change at the Speed of Now: A New Framework* New York: Business Expert Press

Dool, R. (2021). *Leading in Difficult Times and Circumstances*. Seattle: Kindle Direct Publishing.

Dool, R. (2021). *Leaderocity™: Leading at the Speed of Now*. New York: Business Expert Press.

Dool, R. (2019). *12 Months of Leadership Insights*. Seattle: Kindle Direct Publishing.

Dool, R. (2019). *How Generation Z Wants To Be Led*. Seattle: Kindle Direct Publishing.

Dool, R. (2007). *Enervative change: The impact of change initiatives on job satisfaction*. Saarbrücken, Germany: VDM Verlag Publishers.

Chapters:

Dool R. (2017). Teamwork and Conflict in Organizations: Leadership. In Gigliotti, R., Ruben, B. & Goldthwaite, C. *Leadership: Communication and Social Influence in Personal and Professional Contexts* (pp. 153-172). IA: Kendall Hunt.

Dool, R. (2010). Mitigating conflict in online student teams. In R. Ubell (Ed.), *Virtual teamwork: Mastering the art and practice of online learning and corporate collaboration* (pp. 65-90). New Jersey: Wiley Publishing.

Dool, R. (2010). Teaming across borders. In R. Ubell (Ed.), *Virtual teamwork: Mastering the art and practice of online learning and corporate collaboration* (pp. 161-191). New Jersey: Wiley Publishing.

Journal:

Dool, R. (2024). *Influere: Journal of Leadership Communication*. Founding Editor of new Peer-Reviewed online journal dedicated to Leadership Communication. (*In process – approved, seeking Grant*).

Articles:

Dool, R. (2020). Leaders Impact on the Employee Voice. Proceedings of the International Academy of Management and Business (IAMB) Winter Conference, December 2020.

Dool, R. (2020). Leaders must listen to employees, especially in these uncertain times, Opinion, NJ Star Ledger, nj.com (December 2020).

Dool, R. (2020). Nothing Tests a Leader's Skill Like a Crisis. Opinion, NJ Star Ledger, nj.com (June 2020).

Dool, R., Koufie, M. & Watson, M. (2018). Relationship Between Spiritually Intelligent Leadership and Employee Engagement. *Journal of Marketing and Management (JMM)*, 9(2), November 2018.

Dool, R., Mancini, D. & Scott, C. (2018). The Effect of Paid Time Off for Volunteerism on Organizational Citizenship Behavior: Is it Influenced by National Culture? *International Journal of Business and Public Administration (IJBPA)*, 15(1), Fall 2018.

Dool, R. & Miller, G. (2017). Descriptive Analysis of Email Processing by Managers of For-Profit Educational Organizations. *International Journal of Business Research and Information Technology*. 4(1), Winter 2017.

Dool, R., D. Stephens-Craig, & M. Kuofie (2015). An Overview: Perception of introverted leaders. *International Journal of Global Business*, 8(1), 93-103, June 2015

Dool, R., D. Stephens-Craig, & M. Kuofie (2015). Perception of Introverted Leaders by Mid to High-Level Leaders Based on Typology: A qualitative study. *Journal of Marketing and Management*, 6(1). May 2015.

Dool, R. & McMahon, T. (2013). The Symmetric Model of Communication Re-Visited. Proceedings of the 16th Annual Conference of the International Academy of Management and Business (IAMB), Washington, D.C. November 6, 2013.

Dool, R. & Wooden, C. (2013). Leaderocity™: Communicating at the speed of now. The intersections of vision, strategy, leadership and communication. International Academy of Business and Public Administration Disciplines (IABPAD) Conference (January). Proceedings of the International Academy of Business and Public Administration Disciplines (IABPAD) Winter Conference.

Dool, R., Drake, T., Mancini, D., Strom, B., & Shearer, D. (2012) Lessons from the military: A new framework for managing change revisited (C⁶). Proceedings of the International Academy of Business and Public Administration Disciplines (IABPAD) Fall Conference.

Dool, R. & Ciccotelli, P. (2012). Leaderocity™: Communicating at the speed of now. More than words, A holistic approach. Proceedings of the International Academy of Business and Public Administration Disciplines (IABPAD) Fall Conference.

Dool, R. (2012). Leaderocity™: Leading at the speed of now. Proceedings of the 12th Annual Conference of the International Academy of Management and Business (IAMB) (ISSN 1949-9108).

Dool, R. (2011). The Dialogue Intensive Online Classroom. *Journal of Education, Informatics and Cybernetics*, 2(3).

- Dool, R. (2011). Managing Conflict in Online Multicultural Student Teams. *Journal of Education, Informatics and Cybernetics*, 2(2).
- Dool, R. (2010). Lessons from the military: A new framework for managing change (C⁵). Proceedings of the International Academy of Business and Public Administration Disciplines (IABPAD) Spring Conference.
- Dool, R. (2010). Lessons from the military: A new framework for managing change (C⁵) *Journal of Leadership and Organizational Studies (Current Issues in Management)*, 17(3).
- Dool, R. & Mooney, A.C. (2010). ABSOLUT in 2004. *Case Research Journal*, 29(3&4).
- Dool, R. (2009). Change Fatigue™: The impact of enervative change on job satisfaction. *The Journal of Management Sciences/Revue Sciences de Gestion*, Vol. 70. Fall 2009.
- Dool, R. (2008). Change Fatigue™: The impact of enervative change on job satisfaction. In Savall, H., Bonnet, M., & Zardet, V. (Eds.), *International Conference and Doctoral Consortium: Vol.1*. Academy of Management and ISEOR (pp. 487 – 501). Lyon, France: Universite Jean Moulin.
- Dool, R. (2008). Managing Conflict in Online Collaboration. *Online CI@ssroom*, May 2008, p. 3.
- Dool, R. (2007). "Dialogue intensive learning," *eLearn Magazine* of the Association for Computing Machinery (ACM).
- Dool, R. (2007). "Managing conflict in student team assignments," *eLearn Magazine* of the Association for Computing Machinery (ACM).

Presentations

- Dool, R., Radford, M., Radford, G. & Chayko, M. (2022). Book Publishing and the Pandemic: Overcoming Obstacles and Promoting Productivity Thematic Summary. New Jersey Communication Association Conference, March 26, 2022.
- Dool, R. & Rotolo, E. (2021). The Impact of the COVID-19 Pandemic on the Expansion of Telehealth and the Question of Sustainability. International Academy of Business and Public Administration Disciplines (IABPAD) Online Fall Conference, October, 2021.
- Dool, R., Dwyer, M., Goldthwaite C. & Sahay, S. (2021). Communication as the Foundation for Designing and Leading Change. New Jersey Communications Association Conference, March 20, 2021.
- Dool, R. (2021) Learning Journals - Embedding Knowledge. Rutgers Online Learning Conference. March 15, 2021.
- Dool, R. (2021). Are Leaders Listening? A New Model to Leverage Employee Input. International Academy of Business and Public Administration Disciplines (IABPAD) Online Winter Conference, January 4, 2021.
- Dool, R. (2020). Leaders Impact on the Employee Voice. International Academy of Management and Business (IAMB) Winter Conference, December 2020.
- Dool, R. & Alam, T. (2020). Interviews and Assessment From an Employment Perspective: History, Present Day And The Future. International Academy of Business and Public Administration Disciplines (IABPAD) Online Fall Conference, October 24, 2020.
- Dool, R., Borrisoff, D., Knobel, B., & Anwer, A. (2020). Navigating MA Programs and International Student Application Processes. New York State Communication Association Annual Conference. October 17, 2020.

Dool, R. (2020). The Employee Voice. International Academy of Business and Public Administration Disciplines (IABPAD) Online Summer Conference, July, 2020.

Dool R. (2020), Student Engagement Across Cultures. Rutgers Online Learning Conference. June 2020.

Dool, R. & Hunter Y. (2019). Leadership Effectiveness Within Remote Workforces. International Academy of Business and Public Administration Disciplines (IABPAD) Conference, Las Vegas, October 2019.

Dool, R. & Martin, J. (2019). Customer Relationship Management and Leadership Sponsorship. International Academy of Business and Public Administration Disciplines (IABPAD) Conference, Las Vegas, October 2019.

Dool, R. Dickson, K. & Cook, R. (2019). The Art of Soft Skills: Human Resource's Perception Regarding the Employability of Today's Blue and White Collar Job Seekers. International Academy of Management and Business (IAMB), March 2019.

Dool, R. Koufie, M. & Watson, M. (2019). The Relationship Between Spiritually Intelligent Leadership and Employee Engagement. International Academy of Management and Business (IAMB), March 2019.

Dool, R., & Fuller, E. (2019). An Exploration of Servant Leadership Behavior and Job Satisfaction Using Correlational Quantitative Methodology. International Academy of Business and Public Administration Disciplines (IABPAD) Conference, Orlando, January 2019.

Dool, R., & DeVries, C. (2019). Effects of Corporate Social Responsibility Communication On Sinful Firms And Emerging Economic Factors On Gunmakers International Academy of Business and Public Administration Disciplines (IABPAD) Conference, Orlando, January 2019.

Dool, R. & Jackson, A. (2018). Measuring Leadership Styles and Behaviors of Project Managers within the United States in the Context of The Bolman and Deal Four-Frame Model. International Academy of Management and Business (IAMB), Lisbon, October 2018.

Dool, R., Mancini, D. & Cooper, J. (2018). A Quantitative Study in Context and Leadership: The Impact of Transformational and Transactional Approaches on Military Organizations. International Academy of Management and Business (IAMB), Lisbon, October 2018.

Dool, R., Koufie, M. & Hunter, Y. (2018). Leadership Approaches and Motivation within a Remote Workforce. International Academy of Management and Business (IAMB), Lisbon, October 2018.

Dool, R., Mancini, D. & St. Hill, D. (2018). The relationship between organizational culture, organizational commitment, and workplace bullying: a correlational study. International Academy of Business and Public Administration Disciplines (IABPAD) Conference, Dallas, April 2018.

Dool, R., & Rosenthal, E. (2018). Prosocial motivation of nonprofit employees: does it predict organizational commitment among a multi-generational workforce. International Academy of Business and Public Administration Disciplines (IABPAD) Conference, Dallas, April 2018.

Dool, R., Goldwasser, R. & Wiggins, D. (2018). Leadership Development in Higher Education: Meeting The Needs of Military Leaders And Veteran Students In Higher Education. International Academy of Business and Public Administration Disciplines (IABPAD) Conference, Dallas April 2018.

Dool, R. (2018). Dialogue Intensive Learning. Rutgers Online Learning Conference. New Jersey, March 2018.

Dool, R. & Hechl, C. (2017). Mentoring and Affective Commitment to Organizations: A Quantitative Comparison Study of Mentoring Functions among Millennial Employees. International Academy of Management and Business (IAMB), Dubai, October 2017.

- Dool, R. & Schatz, R. (2017). Schatz Happens: A New Organizational Change Approach. International Academy of Management and Business (IAMB), Dubai, October 2017.
- Dool, R. & Paradis, J. (2017). How Complexity Science Can Help Organizations and Leaders. International Academy of Management and Business (IAMB), New Orleans, January 2017.
- Dool, R. (2016). Leaders v managers: A four lens perspective. International Academy of Management and Business (IAMB), London, September 2016.
- Dool, R., Scott, C., & Mancini, D., (2016). The Effect of Paid Time Off for Volunteerism on Organizational Citizenship Behavior: Is it Influenced by National Culture. International Academy of Business and Public Administration Disciplines (IABPAD) Conference. New Orleans, October 2016.
- Dool, R. (2016). Impactful Cohort and Dialogue Intensive Learning. 32nd Distance Teaching and Learning Conference. Madison, WI, August 9, 2016.
- Dool, R. & Koehler, K. (2016). Leadership Lessons from College Athletics. International Academy of Business and Public Administration Disciplines (IABPAD) Conference. New Orleans, October 2016.
- Dool, R. (2016). Leaderocity™: Communicating at the Speed of Now: Three Modalities. 21st Annual Conference of the International Academy of Management and Business (IAMB), Montreal, May 2016.
- Dool, R. & Yee, A. (2016). The Development of Unified Corporate Social Responsibility: Effective Brand Communication. 21st Annual Conference of the International Academy of Management and Business (IAMB), Montreal, May 2016.
- Dool, R. & Miller, G. (2016). Analysis of Manager Email Processing Abilities Within an Organizational Context and the Implications on Time Management. International Academy of Business and Public Administration Disciplines (IABPAD) Conference. Dallas, TX. April 21, 2016
- Dool, R. & Zuo, L. (2016). New Media and Public Crisis: Crisis Management and the Chinese Government. International Academy of Business and Public Administration Disciplines (IABPAD) Conference. Dallas, TX. April 21, 2016
- Dool, R. (2015). Hear. Inspire. Lead: Communication Seminar, *Keynote Speaker*. Leadership Newark and Newark Trust for Education. September 9, 2015.
- Dool, R. (2015). Strategies for the emerging markets: A case study. *Keynote Address*. 7th Annual International Conference on Global Business, Engineering, Energy, Agriculture, and Health. New York, NY. July 10, 2015.
- Dool, R. & Bottary, L. (2015). Tribal Communication: A new perspective. 18th Annual Conference of the International Academy of Management and Business (IAMB), Las Vegas, NV. January, 2015.
- Dool, R. (2015). Misuse of the Leadership Voice: Connecting with Your Stakeholders. International Academy of Business and Public Administration Disciplines (IABPAD) Conference. Orlando, FL., January 5, 2015.
- Dool, R. & Cerjan, R. (2014). Defining a leaders voice and why it matters (The Left Of Boom). International Academy of Business and Public Administration Disciplines (IABPAD) Conference. October 25, 2014.
- Dool, R. & Rennie, K. & Liberman, C. (2014). Chief executive officers as brand ambassadors. International Academy of Business and Public Administration Disciplines (IABPAD) Conference. January 3, 2014.
- Dool, R. & McMahon, T. (2013). "The Symmetric Model of Communication Re-Visited". 16th Annual Conference of the International Academy of Management and Business (IAMB), Washington, D.C. November 6, 2013.

- Dool, R. & Widman, A. (2013). Leaderocity™: M-Leadership: The changing nature of leadership in a mobile digital age. 13th Annual Conference of the International Academy of Management and Business (IAMB), Lisbon, Portugal. April 17, 2013.
- Dool, R. & Wooden, C. (2013). Leaderocity™: Communicating at the speed of now. The intersections of vision, strategy, leadership and communication. International Academy of Business and Public Administration Disciplines (IABPAD) Conference. January 3, 2013.
- Dool, R. & Ciccotelli, P. (2012). Leaderocity™: Communicating at the speed of now. More than words, A holistic approach. International Academy of Business and Public Administration Disciplines (IABPAD) Conference. October 28, 2012.
- Dool, R., Drake, T., Strom, B., Mancini, D. & Shearer, D. (2012). A new framework for leading change (C⁶ Framework) Revisited. International Academy of Business and Public Administration Disciplines (IABPAD) Conference. October 28, 2012.
- Dool, R. (2012). Leaderocity™: Leading at the speed of now. 12th Annual Conference of the International Academy of Management and Business (IAMB), Vistula University, Warsaw, Poland. April 24, 2012.
- Dool, R., Masahudu, O., Cook, R. & Gorriaran, A. (2011). Is There A Correlation Between Organizational Learning And Job Satisfaction Within The Federal Sector And Private Sector Financial Services Industry? International Academy of Business and Public Administration Disciplines (IABPAD) Conference. April 7, 2011.
- Dool, R. Malone-Haddox, K., Bedore, G. & Marion, J. (2011). Effective Leadership Styles Of Charter School Administrators In Tennessee. International Academy of Business and Public Administration Disciplines (IABPAD) Conference. April 7, 2011.
- Dool, R. (2010). Global Classroom: Multiculturalism in the online classroom. 26th Annual Conference on Distance Teaching and Learning. August 6, 2010.
- Dool, R. (2010). Teaching Through Dialogue: Creating a rich learning experience. 26th Annual Conference on Distance Teaching and Learning. August 5, 2010.
- Dool, R. (2010). Effective Global Virtual Teams: Multiculturalism in the Virtual Workplace. 16th International Conference of the International Association for Intercultural Communication Studies, South China University of Technology, Guangzhou, China. June 19, 2010.
- Dool, R. (2010). Lessons from the military: A new framework for managing change (C5) in Practice. 3rd Annual International Conference and Doctoral Consortium on Organization Development and Change. ISEOR Division of Organization Development and the Academy of Management. Lyon, France: Universite Jean Moulin, June 2010.
- Dool, R. (2010). Olagbemi, F., Goldwasser, R., & Achilles, W. The effectiveness of federal regulations and corporate reputation in mitigating accounting fraud. The International Academy of Business and Public Administration Disciplines (IABPAD), April 24, 2010.
- Dool, R. (2010). Lessons from the military: A new framework for managing change (C5). The International Academy of Business and Public Administration Disciplines (IABPAD), April 24, 2010.
- Dool, R. & Hebert, S. (2010). 15th Annual Technology, Colleges and Community (TCC) Online Conference. Dialogue Intensive Learning, April 22, 2010.
- Dool, R. (2010). 15th Annual Technology, Colleges and Community (TCC) Online Conference. Managing Conflict in Online Student Teams, April 20, 2010.

- Dool, R. (2010). Effective global virtual teams: Multiculturalism in the virtual workplace. International Conference on Education, Training and Informatics: ICETI 2010. April 7, 2010.
- Dool, R. (2010). The dialogue intensive online classroom. International Conference on Education, Training and Informatics: ICETI 2010. April 8, 2010.
- Dool, R. (2010). Managing conflict in online multicultural student teams. 8th Annual Online Conference on Teaching and Learning (IOC). March 18, 2010.
- Dool, R. (2010). Dialogue intensive learning. 8th Annual Online Conference on Teaching and Learning (IOC). March 18, 2010.
- Dool, R. (2009). "Teaming Across Borders." Learning Leaders Symposium. Seton Hall University, SetonWorldWide. November, 2009.
- Dool, R. & Hebert, S. (2009). "Dialogue Intensive Learning." 15th Annual Sloan-C International Conference on Online Learning. The Sloan Consortium. October, 2009.
- Dool, R. (2008). "Leaderocity" Leading and communicating at the speed of now." Learning Leaders Symposium. Seton Hall University, SetonWorldWide. November 24, 2008.
- Dool, R. (2008). "Lessons from the Military" A new framework for managing change (C5)." Learning Leaders Symposium. Seton Hall University, SetonWorldWide. November 24, 2008.
- Dool, R. (2008). "Student as Teacher: Shifting the Engagement Pattern." 14th Annual Sloan-C International Conference on Online Learning. The Sloan Consortium. November 6, 2008.
- Dool, R. & Mooney, A.C.(2008). The iconic ABSOLUT vodka brand faces competition. North American Case Research Association (NACRA) Annual Conference, October 31, 2008.
- Dool, R. (2008). "Lessons from the Military" A new framework for managing change (C5)". MidWest Academy of Management Annual Meeting. St. Louis, MO. October 4, 2008.
- Dool, R. & McMahon, T. (2008). "Dialogue Intensive Learning." 24th Annual Conference on Distance Teaching and Learning, Madison, Wisconsin, August 5, 2008.
- Dool, R. (2008). *Change FatigueTM*: The Impact of Enervative Change on Job Satisfaction. International Conference and Doctoral Consortium. ISEOR Division of Organization Development and the Academy of Management. Lyon, France: Universite Jean Moulin, April 21, 2008.
- Dool, R. (2008). "Change Fatigue: An Analysis". University of Maryland (UC). Seminar on Leadership, Change & Virtual Organizations, February 23, 2008.
- Dool, R. (2007). "Leaderocity: Leading at the Speed of Now". Graduate Women In Science Meeting, Seton Hall University, September 17, 2007.
- Dool, R. (2007). "Change Fatigue: The Impact of persistent change initiatives on employee satisfaction". MidWest Academy of Management Annual Meeting. Kansas City, MO, October 4, 2007.
- Dool, R. (2007). "Dialogue Intensive Learning." Seton Hall University, TLTC Summer Series, Online Learning Day.
- Dool, R. (2007). "Managing Conflict in Student Online Teams." 13th Annual Sloan-C International Conference on Online Learning. Sloan-C Consortium. (Nov. 2007)

Dool, R. (2007). Change Fatigue: The impact of persistent change initiatives on employee satisfaction. 3rd Annual Summit. *Building Organizational Development and Change as an Academic Discipline*, Benedictine University, Chicago.

Dool, R. (2006). "Strategies in Organizations: Change Programs," Baruch University, Executive Masters in Labor Relations Seminar.

Dool, R. (2006). The impact of persistent change initiatives on job satisfaction. University of Maryland University College, Research Colloquium.

Dool, R. (2005). "Strategies in Organizations: Change Programs," Baruch University, Executive Masters in Labor Relations Seminar.

Grants

Program Assessment Grant (2016). Assessment Program grant awarded for the Graduate Communication Degree Programs for the College of Communication and the Arts, Seton Hall University (\$4,500).

Mooney, A.C. & Dool, R. (2008). The iconic ABSOLUT vodka brand faces competition. Research grant from the North American Case Research Association (NACRA). (\$2,000)

Seton Hall University (2007). TLTC, Arts & Sciences. Online Course Development Grant. (\$2,000)

United States Trademarks

Change Fatigue™
Leaderocity™

◆ OTHER ACADEMIC EXPERIENCE ◆

Chair, New Jersey Communication Association Annual Conference (2021, 2025)

President, New Jersey Communication Association (2021 – 2022)

Second VP, New Jersey Communication Association (2019 - 2021)

Executive Board, New Jersey Communication Association (2017 - 2022)

Advisor, Rutgers Chapter, National Society of Leadership and Success (2019 - 2020)

Faculty Senate, Rutgers University New Brunswick (2019 - 2022)

Fellow, Rutgers Leadership Academy (2017 - 2019)

Fellow – The Institute of Leadership and Management (UK) (2017-)

Board of Advisors of the International Academy of Management and Business (2016 - 2021)

Chief Editor for the International Journal of Management and Business, IJMB (2016 - 2021)

Leadership Mentor for Incarcerated Students – Federal Grant administrated by Adams State University (2016-)

Mini-Grant Reviewer for the Association of Leadership Educators (2016 – 2019)

Reviewer for The Journal of Leadership Education (2017 - 2019)

Veterans Coach – Rutgers Veterans House (2017-2019)

Reviewer for the Academy of Management and Academy of International Business (2011- 2020)

Associate Editor, Journal of Global Commerce Research (2010)

Panel or Session Chair – Academy of Management, International Conference of the International Association for Intercultural Communication, The International Academy of Business and Public Administration Disciplines, International Academy of Management and Business and Sloan-C International Conference on Online Learning.

Service Leadership (Chair or member):

Faculty Senate, Academic Policy Committee, Graduate Studies Committee, Graduate Education Council, Middle States Accreditation Committee, College Planning Committee, various Faculty Search committees, Instructional Technology Committee, Nominations and Elections, College Executive Committee, Strategic Planning Executive Committee, Graduate Education Advisory Committee.

Facilitator/Seminar Leader:

Experience in developing delivering high impact workshops and seminars.

Recent examples:

- * Facilitated strategic planning sessions for fundraising teams of the Rutgers Foundation.
- * Developed and delivered a Communication Workshop for the Rutgers Athletics Department.
- * Led a seminar on trends in leadership as well as consulted on a mentoring program for a unit of a large State University.
- * Facilitated a senior leadership strategic planning retreat for a school in a Big Ten University.
- * Led a Strengths session for young African leaders for the Mandela Fellowship Program.

◆ DISSERTATION/THESIS EXPERIENCE ◆

Dissertation Experience:

Serving as Chair on 30+ Dissertation Committees and as a member on 30+ Committees, all in business and communication research areas to date.

Theses/Capstones:

Advisor for 100+ Thesis or final Capstone projects at the Masters level.

◆ CERTIFICATIONS ◆

Certified Agile Coach (CAC) (2020)

Global Association for Quality Management

Agile Coach Certification (CAC) introduces participants to essential team coaching skills & team development ideas for starting and growing teams while focusing on teams and organizations as human systems. A key part of this certification focuses on developing an understanding of the professional coaching skillset and the value of honing these skills to serve professionals on an agile team. Agile Coach Certification focuses primarily on the mindset, roles, and responsibilities of an Agile Coach.

Certified Change Management Professional (2020)

Global Association for Quality Management

Certified Change Manager (CCM)[®] - Practitioner Certification structures an in depth skill expertise in the field of Change Management. The Practitioner certification confirms you have achieved sufficient understanding of how to apply and tailor Change Management guidance in a given organizational change situation.

Resilience-Building Leadership Professional™ (2020)

The Resilience-Building Leader Program™

The Resilience-Building Leader Program™ is the credentialing body for the Resilience-Building Leadership Professional™ (RBLP™) series of leadership certifications. Their mission is to identify and certify people that are ready to build resilient teams and lead them in a challenging environment.

Cultural Intelligence Certification (2020)

Cultural Intelligence Center

Cultural Intelligence is the capability to function effectively in a variety of cultural contexts, including national, ethnic, organizational, generational, and many others.

Change Navigator / Change Style Indicator (2020)

Discovery Learning International

The Change Navigator[®] is a revolutionary new tool for change leaders that takes participants on a journey through the stages of transition that are common to periods of change and helps people to understand and navigate them.

Effective Teaching Practices (2019)

Association of College and University Educators and American Council on Education

Faculty credentialed by ACUE have demonstrated comprehensive knowledge and skills across all of the core teaching competencies defined in ACUE's effective practice framework. These credentials distinguish faculty and institutions for their commitment to educational excellence.

Certified DISC Coach (InstituteSuccess) (2019)

DISC is a behavior assessment tool based on the DISC theory of psychologist William Moulton Marston, which centers on four different personality traits which are currently Dominance, Influence, Steadiness, and Conscientiousness.

Certified StrengthsFinder Coach (Gallup) (2018)

The Gallup Organization

Gallup, Inc. is an American research-based, global performance-management consulting company.

Leadership Development Certified Professional (LDCP) (2017)

Institute of Organization Development

The Institute of Organization Development (IOD) provides educational services and consultation in the field of OD to those individuals responsible for organizational change and who are responsible for developing and implementing an aligned Leadership Development Strategy.

Certified Faculty Developer (Online) (2013)

Lern Institute

The goal of LERN's Faculty Developer certification is to prepare faculty developers to assist faculty in improving instructional quality at their institutions.

Certified Human Capital Strategist (2010)

Human Capital Institute - The Global Association for Strategic Talent Management
HCS is a rigorous course of study, recognized by business and government organizations worldwide as the standard certification for Strategic Talent Management.

Certified Quality Matters Peer Reviewer (2007).

Quality Matters is an inter-institutional quality assurance organization, sponsored by Maryland Online, which has developed national standards for best practices for online courses.

Certified Online Instructor (2007).

Certified by The Sloan Consortium (Sloan-C), a consortium of institutions and organizations committed to quality online education. Sloan-C encourages the collaborative sharing of knowledge and effective practices to improve online education.

Communicating in Times of Change, Indiana University (2021)
Managing Project Risks and Changes, University of California (2020)
Project Planning and Management, University of Virginia (2017)
Project Management Leadership, Project Management Academy (2016)
Initiating and Planning Projects, University of California (2016)
Global Business Management Course, GE Executive Learning Center, Crotonville, NY (2011)
Manager Development Course, GE Executive Learning Center, Crotonville, NY (2010)

◆ HONORS and AWARDS ◆

Book, *Leaderocity™: Leading at the Speed of Now*, was selected by Skillsoft for their curated professional content collection on business and management (2022).

Annual Outstanding Faculty Award by Graduate Student Association (Rutgers 2017, 2018, 2019, 2022)

Distinguished Achievement in Service Award, School of Communication Information, Rutgers University (2018)

Smart Choice (Super Scholars) (2015) - Top 25 Online Master's in Communication Program.

Dool, R. & Mooney, A.C. (2008). The iconic ABSOLUT vodka brand faces competition. North American Case Research Association (NACRA), "Runner up" Award (Top 6) – Annual Teaching Case Program. October 31, 2008.

Stanley J. Drazek Teaching Excellence Award Nomination (2004, 2005), University of Maryland (UC)

Presidential Management Fellow Nomination (2005), University of Maryland (UC)

Contact

917-349-5211 (Mobile)
jduncanm3@gmail.com

www.linkedin.com/in/joe-duncan-9364056 (LinkedIn)

Top Skills

Teaching
Blockchain
Cryptocurrency

Languages

English (Native or Bilingual)

Certifications

Series 7, 63

Publications

Blockchain Investor Manual: The Complete Guide to Blockchain Fundamentals, Trading and Investing

Patents

SYSTEMS AND METHODS FOR AUTOMATED DATA ANALYSIS

Joe Duncan

Author, Professor, Advisor, Trader
New York City Metropolitan Area

Summary

I currently teach a graduate course on Blockchain applications and data analytics at Stevens Institute of Technology, after teaching a related graduate course on Cryptocurrency trading and investing at Columbia University. This is an extension of my last decade+ work in the FinTech space in the U.S. and in Asia where I was an investor and advisor to Artificial Intelligence and Blockchain initiatives. In March 2020, I co-authored the book "Blockchain Investor Manual: The Complete Guide to Blockchain Fundamentals, Trading and Investing." I perform ongoing research on Cryptocurrency and Blockchain, while consulting and acting as advisor to UHNW Blockchain investors and to projects including NFTs.

Prior to embarking on a career in financial technology, I was a pioneer in the derivatives market with over fifteen years of experience at various financial institutions such as Citibank and Morgan Stanley. At my last position on Wall Street, I was Managing Director - Head Structured Credit Trading Americas at ABN AMRO, where I led the bank's central role in establishing CDX Credit Default Swap indexes (now called CDX Markit). Covering North American and Emerging markets, CDX accounts for 40% of the CDS notional trading volume in DTCC.

I look forward to sharing my knowledge and appreciate the perspective of others. Toward that end, I am an active speaker at several events and television shows, including those hosted by Microsoft and RT America. While in Asia, I delivered the keynote address at a number of FinTech events. I also conducted workshops at the American Association of Singapore providing mentorship for professionals in transition titled "Turning the Tables on Disruption: Making the Career Switch to Tech Ventures."

I stay connected to my more than 30K followers on social media with frequent blog posts of my views and analysis.

Experience

Stevens Institute of Technology

Adjunct Professor

September 2022 - Present (2 years 1 month)

Hoboken, New Jersey, United States

I teach a graduate course on Blockchain technology, emphasizing the practical application in various fields including banking and finance, software development, social media, and real estate. To better enhance the learning experience, the course also has an entrepreneurial component which views Blockchain from the perspective of an early-stage company or community.

As a result of this course, students will be able to:

- Understand the problem set that Bitcoin creator Satoshi Nakamoto was trying to solve, and his proposed solution;
- Understand the differences between Bitcoin and smart contract platforms like Ethereum;
- Examine Blockchain use-cases among different applications like Stablecoins, DeFi, and NFTs, and along different verticals such as social media, real estate, and banking;
- Learn how to use data analytics tools to track, analyze and visualize on-chain data;
- Open and utilize their own Ethereum wallet;
- Develop a business plan for an early stage Blockchain project.

Blockchain Investor Manual

Co-Author

March 2020 - Present (4 years 7 months)

How can the new investor entrant to blockchain sort through the noise on social media and elsewhere, when icons of the business world like Warren Buffet and Elon Musk have radically different takes on it, the former referring to Bitcoin as a “delusion” and “rat poison squared”, the latter “quite brilliant”? Even within the blockchain space so-called “experts” can’t seem to agree on

the meaning of loosely thrown around terms and phrases like “decentralized” and “digital gold”—or even on “blockchain” itself. The purpose of this book is to cut through the noise, providing an analytical, neutrally voiced basis for investors to understand this new technology. The book also provides a durable overall cryptocurrency valuation framework, offering a fresh perspective for the seasoned analyst too.

Available from Amazon in paperback and eBook:

https://www.amazon.com/dp/B089M1F2HP/ref=cm_sw_r_cp_apo_i_bNUrFbAZWJDKF

171 Duane Street Owners Corp.
Board Director and Treasurer
August 2000 - Present (24 years 2 months)
New York City Metropolitan Area

Columbia Engineering
Visiting Lecturer
October 2020 - June 2022 (1 year 9 months)
New York City Metropolitan Area

I taught a graduate course focusing on investing in Bitcoin, other cryptocurrencies and distributed systems. I produced curriculum material which includes an introduction to Bitcoin, on-chain data analytics, and alternative valuation approaches to identify trading and investing opportunities.

MDC Pte. Ltd.
Senior Advisor
December 2018 - December 2019 (1 year 1 month)
Greater New York City Area

MDC capitalizes on 2 interconnected industry-specific problems:

Renewable Energy (RE)

RE projects are faced with chronic intermittency issues. Projects often generate power when the grid is overburdened, and power simply goes to waste.

Data Centers/Crypto Mining

Data Centers are constantly searching for cheaper power in order to compete. As efficiency gains from hardware slow, access to cheap power becomes the key ROI generating input.

MDC looks to deploy its modular solutions in the Asian RE space to address these realities. In addition to profitably mining BTC and other PoW cryptos across a broad value range, MDC will alleviate mining centralization and accelerate network adoption, while supporting sustainable economic development.

Sqream Technologies

Senior Advisor

April 2017 - November 2018 (1 year 8 months)

Singapore

Sequential Quantum REduction and Encryption Model

Data acquisition and machine learning analytics vital to the strategic mission of financial institutions.

Winner Monetary Authority of Singapore 2017 Global Fintech Award

Duncan Capital

Founder

September 2016 - November 2018 (2 years 3 months)

New York and Singapore

FinTech focused investing, consulting, and speaking.

** Entity I used to transact when I was primarily based in Singapore. No longer active after focusing more of my efforts in U.S. **

NUS Business School

Panelist - New Venture Creation

March 2014 - March 2017 (3 years 1 month)

Singapore

MTPL

Board Director

2012 - 2016 (4 years)

Singapore

"PROretail" predictive data analytics to improve customer conversion. Strategic interest sold to Singapore's Mediacorp Ptd Ltd July 2016.

Eris Capital Management

Managing Director

2008 - 2011 (3 years)

Managed structured note products.

ABN AMRO Bank N.V.

Managing Director - Head Structured Credit Trading Americas

2002 - 2007 (5 years)

New York, New York

Led the bank's central role in establishing CDX Credit Default Swap indexes (now called CDX Markit). Covering North American and Emerging markets, CDX accounts for 40% of the CDS notional trading volume in DTCC.

Morgan Stanley

VP Derivatives

1998 - 2001 (3 years)

New York, New York

Citi

VP Debt Restructuring and Derivatives

1990 - 1998 (8 years)

New York, New York

Drexel Burnham Lambert

Investment Banking Associate

1989 - 1990 (1 year)

New York, New York

New York State Senate

Staff Member

1985 - 1986 (1 year)

Albany, New York

Office of Senator Roy M. Goodman representing Manhattan's East Side

Education

Northwestern University - Kellogg School of Management

Master of Business Administration (MBA), Finance & Marketing

Columbia University in the City of New York

Post graduate course work, Information Technology

SUNY at Buffalo

Bachelor's degree, Economics

Jacob Erickson
Norwalk, Connecticut
Phone: (206) 452-9069
Email: jericks2@stevens.edu

ACADEMIC EMPLOYMENT

Visiting Assistant Professor, Computer Science
Vassar College | Poughkeepsie, NY

Incoming August 2024

EDUCATION

Doctor of Philosophy in Data Science
Stevens Institute of Technology | Hoboken, NJ

Expected July 2024

Master of Science in Computer Science
Northeastern University | Seattle, WA

August 2020

Bachelor of Arts in Business Administration, Accounting
University of Washington | Bothell, WA

June 2015

Associate in Arts
Shoreline Community College | Shoreline, WA

August 2012

RESEARCH INTERESTS

Online Communities, Social Computing, Digital Political Communication, Technology & Society, Human-Computer Interaction, Text Analysis, Social Media, Data Science

MANUSCRIPTS UNDER REVIEW AND IN-PREPARATION

Erickson J., Yan B. Anti-Hate Content Moderation and Alt-Tech: The Case of BitChute. *ACM Conference on Computer-Supported Cooperative Work & Social Computing (CSCW) 2024. Revise & Resubmit.*

Yan B., Gurkan N., **Erickson J.**, Han B. AI in Team Decision-Making: Timing, Information Elaboration & Performance. *In preparation for submission to Management Information Systems Quarterly (MISQ).*

Erickson J., Yan B. Global Governance and Alt-Tech: How External Actors Shape Platform Discourses. *In preparation for the ACM Conference on Human Factors in Computing Systems (CHI) 2025.*

PEER-REVIEWED JOURNAL PUBLICATIONS

Erickson J. (2024). Rethinking the Filter Bubble? Developing a Research Agenda for the Protective Filter Bubble. *Commentary. Big Data & Society, 11(1).* <https://doi.org/10.1177/20539517241231276>.

Erickson J., Yan B., Huang J. (2023). Bridging Echo Chambers? Understanding Political Partisanship through Semantic Network Analysis. *Social Media + Society, 9(3).* <https://doi.org/10.1177/20563051231186368>.

Erickson J., Yuzon J., Bonaci T. (2022). What You Do Not Expect When You Are Expecting: Privacy Analysis of Femtech. *IEEE Transactions on Technology and Society. Volume: 3 Issue: 2: 121-131.*

PEER-REVIEWED CONFERENCE PROCEEDINGS

Erickson J., Yan B. (2024). Affective Design: The Influence of Facebook Reactions on the Emotional Expression of the 114th US Congress. *ACM Conference on Human Factors in Computing Systems (CHI) 2024*. <https://doi.org/10.1145/3613904.3641935>.

Wu, K., **Erickson, J.**, Wang, W.H., Ning Y. (2022). Equipping Recommender Systems with Individual Fairness through Second-order Proximity Embedding. *ASONAM 2022: IEEE/ACM International Conference on Advances in Social Networks Analysis and Mining*.

TEACHING

Instructor

Stevens Institute of Technology

- BIA 658: Social Network Analysis (Masters) *Fall 2023*
- BT 466 Workshop: Data Analytics (Undergraduate) *Fall 2023*
- Pre-College Program: Introduction to Coding (High School) *Summer 2022*

Teaching Assistant

Stevens Institute of Technology

- BIA 500: Business Analytics: Data, Models & Decisions (Masters) *Spring 2024*
- BIA 658: Social Network Analysis (Masters) *Spring 2024*
- BIA 658: Social Network Analysis (Masters) *Spring 2023*
- CS 561: Database Management Systems (Masters) *Spring 2022*
- CS 442: Database Management Systems (Undergraduate) *Fall 2021*

Teaching Assistant

Northeastern University

- CS 6220: Data Mining Techniques (Masters) *Summer 2020*

AWARDS

Provost Doctoral Fellowship

Stevens Institute of Technology

Pivotal Ventures Scholarship

Northeastern University

Merit Scholarship

Northeastern University

Magna Cum Laude Graduation Honor

University of Washington

President's List Graduation Honor

Shoreline Community College

PROFESSIONAL SERVICE

Reviewer

New Media & Society

Summer 2024

Reviewer *Spring 2024*
Social Media + Society

Reviewer *Fall 2023*
New Media & Society

**Member of the Search Committee for the
Vice President for Enrollment Management** *Spring 2022*
Stevens Institute of Technology

Reviewer *Spring 2022*
International Conference on Information Systems (ICIS)

Doctoral Student Liaison, Graduate Student Council *2021-2022 Academic Year*
Stevens Institute of Technology

Club Council Treasurer *2013-2014 Academic Year*
University of Washington

SOFTWARE KNOWLEDGE

Languages: Python, SQL, R, Java

Libraries & Other Software: Pandas, Scikit-learn, Jupyter Notebook, Gephi, Tableau, Excel

PROFESSIONAL CERTIFICATIONS

Certified Public Accountant *Certified October 2017*
Washington State Board of Accountancy

INDUSTRY EXPERIENCE

Financial Analyst *June 2015-March 2018*
Amazon.com | Seattle, WA

Financial Analyst Intern *September 2014-March 2015*
Amazon.com | Seattle, WA

Partner Development Intern *June 2013-August 2013*
MindBloom | Seattle, WA

Frank J. Gallucci

179 Milldam Rd, Centerport, NY 11721 | fgallucci@whitestone.net | Cell: (516) 446-2416, Office: (631) 261-8893

Work experience:

2022-present **WHITESTONE ANALYTICS, a wholly owned entity of Whitestone Associates, LLC** **CENTERPORT, NY**
Managing Director and Founder

- Whitestone Analytics is developing an algorithm and supporting databases to predict if an entity is predisposed to sell itself.
- Market target: Motion Control
- If the use case is successful, Whitestone Analytics will have created a tool that will reduce the time an acquisition takes by over 50%.

1992-present **WHITESTONE ASSOCIATES, LLC** **CENTERPORT, NY**
Managing Director and Founder (www.whitestone.net)

- Boutique investment banking firm specializing in M&A services and strategic planning
- Facilitated transactions in niche markets for small to mid-sized international and domestic clients
- Client assignments included strategic planning, business development, acquisitions, divestitures, and equity/debt facilitation across five continents

2000-present **MILLDAM PROPERTIES, LLC** **CENTERPORT, NY**
Sole Owner

- Owns and operates a commercial facility that encourages entrepreneurs and start-ups to lease office space, share ideas, and network
- The NY office of Whitestone Associates, LLC is located there

1991-1992 **TRINOVA, FLUID POWER GROUP** **MAUMEE, OH**
Director of Planning

- Responsibilities included strategic/business development and niche expertise on mergers and divestitures

1987-1990 **ELLSWORTH GROUP, INC.** **GARDEN CITY, NY**
Managing Director

- Founded the Ellsworth Group to facilitate M&A in the lower end of the middle market

1978-1986 **ABEX CORPORATION** **BOSTON, MA**
Director of Strategic Planning, Director of Financial Planning, Financial Analyst

- Responsibilities included strategic business development, financial valuations and M&A Analytics Support

Leadership:

2015-present **Stevens Institute of Technology:** Business School Advisory Board, Chair
2013-present **Adelphi University:** Willumstad School of Business Advisory Board
(2015) **Adelphi University, Search Committee:** *Dean*, Willumstad School of Business
2010-2011 **Triad Technologies, private company:** Advisory Board
(2010) **Clean Diesel Technologies (CDTI), public company:** Strategy-arm Committee
2009-2010 **Bronx Red Cross:** Advisory Board

Teaching:

2003-present **ADELPHI UNIVERSITY, GOAL MBA PROGRAM** **GARDEN CITY, NY**
Adjunct Professor

- S/T: Consulting Project (391)
- Business and Society (BUS 162)
- Ethical Leadership and Management Styles (MGT 667)
- Negotiations and Communications in a Global Context (BUS 694)
- Entrepreneurship/Intrapreneurship (BUS 662)
- Leadership and Innovation in Complex Systems (BUS 666)
- Management Styles and Team Building (MGT 791)
- Statistical Methods (OPR 670)
- Best Practices, Operations, and TQM (OPR 678)
- Management and Information Systems (OPR 573)
- Strategic Management (BUS 679)
- Marketing Research (MKT 780)
- Negotiation for the Business Professional (BUS 689)

- Corporate Finance (FIN 630)
- Management Theory & Organizational behavior (MGT 561)

2017-present

STEVENS INSTITUTE OF TECHNOLOGY

Adjunct Professor

- Strategic Management (MGT 699-WS)
- Financial Management (FIN 623)
- Discovering & Exploiting Entrepreneurial Opportunities (MGT 663-WS)
- Field Consulting Program (MGT-810)

(2006)

STATE UNIVERSITY OF NEW YORK

FARMINGDALE, NY

Adjunct Professor

- Investments (BUS 291)

Education:

(1978)

HOFSTRA UNIVERSITY

HEMPSTEAD, NY

MBA, Accounting

(1974)

HOFSTRA UNVIERSITY

HEMPSTEAD, NY

M.S., Counseling & Education

(1972)

STATE UNIVERSITY OF NEW YORK

ONEONTA, NY

B.A., Psychology

1974-present

PROFESSIONAL ENHANCEMENT STUDIES

New York University, University of Michigan, Northwestern University

Publications:

- Gallucci, Frank (2009). Value: What it is and How to measure it, The Hauppauge Reporter
- Gallucci, Frank (2009). Value: How do we create it, The Hauppauge Reporter
- Gallucci, Frank (1996). Capital Resource Advisor, Economic and Business Development Program. S. California: Southern California Edison.
- Gallucci, Frank (1986). The New York Phone Company (pp. 77-97). The Impact of Zero Base Budgeting on Managerial Behavior, Volume 1(Series 21). Hempstead, NY, Hofstra University Yearbook of Business.
- United States Patent No 3,949489. April 13, 1976. Teaching Apparatus

Guest lectures, interviews and special events:

(2023)	Adelphi University-International	Utilizing Entrepreneurial Concepts to Create Value
(2021)	Adelphi University	Trans-Atlantic Virtual Exchange and Collaboration (TAVEC)
(2020)	Hochschule Fresenius	Entrepreneurship
(2016)	New York Financial Press	Interview, Entrepreneurship
(2016)	Adelphi University	Pitch Long Island, Judge
(2016)	Adelphi University	Principles for Living: What Matters
(2016)	Adelphi University	Student Mentor program
(2015)	Adelphi University	Student Mentor program
(2015)	Adelphi University	Principles for Living- What Matters
(2015)	Adelphi University	Cutting a Deal: Life Lessons for a Global Marketplace
(2015)	Adelphi University	Leading You Inc.: Creating Value in a Global Marketplace
(2015)	Adelphi University	Developing Your Personal Brand
(2013)	Lillehammer University College	Entrepreneurship
(2013)	Adelphi University	Prominent Corporations in the US You May Want to Know
(2013)	Adelphi University	Are You an Entrepreneur
(2012)	SUNY at Farmingdale	Italian Innovations in the Areas of Money, Banking, and Commerce
(2012)	Axial Market	Interview: The M&A Market
(2011)	SUNY at Farmingdale	Italy: Economic Influences and What Matters

Personal:

I love history, baseball, the equity markets and a good glass of wine.

Dr. Wajahat Gilani

CONTACT INFORMATION	Rutgers Business School Newark & New Brunswick Rutgers University 100 Rockafeller Road, Room 5144 Piscataway, NJ 08854 USA	Tel: +1-718-702-6780 waj@business.rutgers.edu www.business.rutgers.edu/faculty/wajahat-gilani
TEACHING INTERESTS	<ul style="list-style-type: none">• Quantitative Value Models using R and Python• Business Analytics Programming (Python)• Business Intelligence (R)• Business Applications for Machine Learning (R) - Created New Course• Management Information Systems (SQL)• Web based Data Dashboard Programming (Python, fastAPI, SQLAlchemy) - Created New Course	
RESEARCH INTERESTS	<ul style="list-style-type: none">• Targeted Demographic Search with Big Data• Optimal Pivoting in Data-Driven Entrepreneurship• Bayesian Learning• Machine Learning Applications in Opportunity Discovery• Quantitative Analysis of Landing Page Strategies	
CITIZENSHIP	US Citizen.	
EDUCATION	Ph.D., 2016, Rutgers University , Newark, NJ, USA. <ul style="list-style-type: none">• Dissertation: <i>Optimal Investing in Illiquid and Incomplete Markets</i>• Dissertation Adviser: Professor Michael N. Katehakis• Area of Study: Management Science and Information Systems & Finance Masters in Quantitative Finance, 2004 Rutgers University , Newark, NJ, USA. <ul style="list-style-type: none">• Area of Study: Quantitative Finance• Specialization: Quantitative Research and Derivative Pricing B.S., 2001 Rutgers University , Newark, NJ, USA. <ul style="list-style-type: none">• Major: B.S. in Computer Science• Major: B.A. in Economics	
TEACHING EXPERIENCE	Assistant Professor of Professional Practice Instructor Rutgers University, Department of Management Science and Information Systems, Newark and New Brunswick campuses, New Jersey <ul style="list-style-type: none">• Masters in IT and Analytics Advisor, and on the admittance board• Lectured Statistical Methods In Business• Hosted career info sessions for MISA and BITS organizations• Panelist at BAIT major introduction events• Presenter at MBA open house for MSIS department• Panelist and Financial Analytics Conference in Malaysia• Guest lecturer at La Salle University on the future of Financial Analytics and Big Data• Receptient of the 2017 Rutgers Business School Professor of the Year Award• Lectured Business Research Methods• Lectured Management Information Systems• Lectured Information Systems Security• Developed and Lectured the class Investment Modeling in R, including course materials	September 2017 - present September 2012 - July 2017

- Developed and Lectured the class Business Analytics Programming in Python for MBA students and MISA students new to programming, including course materials
- Developed and Lectured an R based version of the class Analytics in Business Intelligence for MBA students and MISA students new to programming, including course materials
- Attended MSIS Brown Bag Seminar
- Attended MSIS Department Seminar
- Advisor to students on Honors Thesis
- Student Advisor to MITA program
- **Student Entrepreneurship Project: Bellemint** Initially an online community for make-up artists. The team used Instagram API and screen scraping to identify target make-up artists and automatically created profiles, while sending them direct messages to tell them it happened. Unfortunately, due to changes in laws in Europe and the U.S., we had to pivot to becoming the hub on make-up and products that are infused with healthy ingredients. The goal is to release our own product under the Bellemint brand.
- **Student Entrepreneurship Project: Ace My Career** An online platform where students can find tutor who have taken the same specific class, with the same specific professor, with the idea that a fellow student who has already done well in the same course, can be a more effective tutor. In addition, the platform is meant to allow students to get help with their resumes and interviews from fellow students that have successfully completed and internships that the student is targeting. Currently, Ace My Career is active, but we are now pivoting to a search methodology, where a student submits the service they are looking for and our system searches possible people for them to network with.
- **Student Entrepreneurship Project: www.loftaway.com (Ended)** A membership based flight app used for people commuting between states, using small regional charter planes. The team is going to use twitter feeds to identify and advertise people that use amtrak trains and Newark airport for business travel between states. We unfortunately ended the business because there were many competitors entering this field and our analytics wasn't going to give us a competitive advantage.
- **Student Entrepreneurship Project: www.coffejaunt.com (Ended)** A peer-to-peer coffee delivery service for a college campus. Students could be compensated for picking up coffee or small snacks for fellow students on their way to the same location. Although the idea had promise, we closed this project because the profit margins would be small and it required us to invest in a phone app that would take considerable amount of initial investment.

Adjunct Lecturer Fall 2022 - Spring 2023

- School of Business Stevens Institute of Technology, Marketing Analytics

Adjunct Lecturer Fall 2022 - Spring 2023

- NYU School of Professional Studies, Research Proposal Methods, Database Design

Adjunct Lecturer Fall 2020 - Spring 2021

- Columbia University, Applied Analytics in Organization Context

HARDWARE AND SOFTWARE SKILLS

Computer Programming:

- Html, Java, R, VBA, SQL, Python (pandas, numpy, scipy, flask), Matlab, C, Visual C++, Ampl (CPLEX, LP Solvers), SAS, Perl, Scheme, JavaScript, Oracle, Sybase, Unix, and Kornshell

Quantitative Analysis:

- Numerical pricing techniques, multi-tier trees, matrices, iterative methods, R/S analysis, Continuous and finite stochastic simulations, Ampl optimizers, Monte-Carlo Simulations, Dynamic Programming and various time series

Desktop Editing and Productivity Software:

- Microsoft Office, OpenOffice.org, LibreOffice, Corel WordPerfect, Google Docs

- RStudio, Spyder, Pinegrow, TexStudio

Operating Systems:

- Microsoft Windows family
- Apple OS X
- Linux and UNIX

BOOKS

[1] (Pending) Quantitative Investment Modeling in R

PROFESSIONAL
JOURNAL
PUBLICATIONS

[1] (Pending) Data-Mining S&P 500 ETF's Future Volatility using 13F Filings

[2] (Pending) Case Study on a Options-Based Approach for Landing Page Strategies

AWARDS

- 2017 Thomas Motts Jr., Rutgers Business School Professor of the Year Award.
- Rutgers University MSIS Teaching Excellence Award for 2016-2017.
- Rutgers University MSIS Teaching Excellence Award for 2018-2019.

ACADEMIC
SERVICE

Panelist on Presenting the BAIT major to underclassmen, sponsored by BITS

Presentation on Data Analytics to underclassmen interested in attending RBS , sponsored by BITS

Presentation on MSIS for the Rutgers MBA Open House, sponsored by the Graduate Program

Hosted career-night info session, sponsored by MISA

PROFESSIONAL
EXPERIENCE

StrikeValuation, Investment Data Scientist, Princeton, NJ April 2008 to Present

- Designed, built, maintained and expanded the hedge-fund database for fundamental research data, investor/accounting data, and market price data in SQL Server using 3NF standards
- Developed a platform for upstream data sourcing and transformation (using C#, stored procedures), and the integration into downstream data from 3rd party API (Bloomberg, Back-Stop, Enfusion), and the development of processing analytics on the accuracy of data processing
- Lead data sourcing projects in collaboration with portfolio managers and researchers, to quantify the impact value of new data on research and models
- Redeveloped legacy code into smaller modules that are easier to update for junior developers and easy to monitor for the analytics teams, the emphasis on a flexible platform that allows for quick updates and experimentation, while maintaining legacy processes
- Built in C# and R, a stock screener for domestic and international stocks using fundamental ratios (ROIC, Earnings Yield, Current Ratios, etc.)
- Developed an R program to calculate cost of capital, for stocks in all the major indices
- Worked on implied volatility program in C# and R, using non-normal distributions
- Built a C# program that connected to a 3rd party API to source fundamental loan data, and combine it with in house proprietary data to run monte-carlo simulations in the hedge-fund's proprietary simulator
- Developed a daily exposure and performance system using SQL Server and MS Reporting services for a multi-strategy hedge fund
- Design and developed an alpha generation tool in Java, that utilized Earning Power Value and price volatility, to generate and backtest trading ideas

Citigroup, FX Derivatives Quantitative Analyst, New York, NY July 2007 to April 2008

- Purchaser Price Parity modeling, testing for reversion trends, auto-correlation
- Emerging market Early Warning System, constant monitoring of macroeconomic variables to ensure no outlier events are taking shape
- Time-series analysis, stationary/non-stationary, distribution analysis

- Short-term momentum strategies/long-term carry strategies
- FX linked commodity valuations based on short-term volatility

Libertas Partners, Quantitative Desk Analyst (CDO/CMBS/ABS), Greenwich, CT February 2006 to July 2007

- Developing basic models and simulations for pricing different HY bond strategies and CDO's
- CMBS DSCR analysis
- CDO OC/IC ratio analysis, coverage test analysis (geography, property type, etc)
- Collateral analysis (technical & fundamental), includes traditional bonds, airplanes, shipping containers, medical technology, etc.
- CDO and ABS cash-flow forecasts based on historical and quantitative analysis
- Track and measure industry standards and trends in regard to structuring, collateral, and spreads
- Extensive use of Intex (desktop & web)

JP Morgan & Chase, Quantitative Credit Research Analyst, Iselin, NJ February 2005 to February 2006

- Designed and implemented valuation score-cards in C++ signaling MSA's that are excessively high in value and in turn, advising short-term to long-term changes in loan policies in those branches operating within those MSA's. Utilized explicit finite matrices to evaluate values.
- Wrote various VBA applications for weekly/monthly reporting, ranging from market analysis to portfolio evaluation, utilizing VBA and Excel functions in various macros
- Prepared summary and analysis reports on various products and their relative performances for upper management and their expected performances based on continuous normally distributed stochastic processes.
- Developed benchmarks, based on relevant factors, to measure relative performance of real estate portfolios. In designing benchmarks, used Ampl and LP solver optimization to design hybrid product benchmarks.
- Market analysis and commentary on the economy and relevant products for upper management and horizontal teams utilizing SAS statistical and reporting functions.
- Worked with product development testing and analyzing new products probability and scope of profitability by giving expected returns based on historical data as well as simulations done using binomial/trinomial trees.

Merrill Lynch Investment Managers, Junior Quantitative Analyst/Investment Technology Analyst, Princeton, NJ August 2001 to February 2005

- Developed and tested Genetic Programming Simulation utilizing Visual C++ or Japanese Equity factors analysis. Genetic Programming is the next step beyond ARCH and GARCH simulations, but nonparametric, and a step behind Neural Networks. The computer randomly generates combinations of factors and back tests the factors against various time frames of historical data. The result showed overall which factors statistically did better than others and within various time periods (the Asian Market crisis) how certain factors performed.
- Developed/Supported traders VBA/Excel applications. Ranged from redesigning to troubleshooting various subs and functions, as well as programming of 3rd party tools such as Bloomberg's blp functionality
- Developed volatility analysis excel sheet that pulled in securities held via ado call to Oracle database and historical data via Bloomberg, and wrote a GARCH sub that performed volatility analysis on securities for trading purposes
- Developed Asset Allocation Model for the FDP Series of diversified investment products. The Model utilized non-linear/linear optimizers, efficient frontiers, and volatility analysis. It is currently used as part of the investment decision-making process for Asset Allocation. Developed a Java GUI Front end that sat on top of Java classes and Ampl in combination with the CPLEX solver that would optimize combinations of various chosen assets to pro-

- duce efficient frontiers and optimized portfolios.
- Performed VBA development/support for traders and portfolio managers, ranging from single to multiple sheets interacting with 3rd party tools (Bloomberg, factset).
 - Monitored emerging market total foreign exchange risk within portfolios, to assist Senior Quantitative Analyst in using currency options, futures and forwards hedging against various international currency exposures.
 - Performed attribution analyses for the ML Equity Growth funds and credit analysis for emerging market funds, daily and weekly reports that showed which sectors were performing better and which securities within those sectors were performing the best, and then comparing them with our portfolio selections to show PM's where we were under and over performing.
 - Assist FX Manager in financial reporting to both internal and external reporting agencies.
 - Back-tested and implemented various trading strategies for Senior Quantitative Analysts and traders, utilizing moving averages, ARCH, and finite stochastic optimizations. Wrote trading strategies in Java and Visual Basic.
 - Designed and implanted Black-Scholes finite equation and Implicit and Numerical Matrices to triangulate option prices and measure implied volatility, as well as measured and reports all the Greeks for the Capital & Investments Fund which took positions in equity options. Wrote this in Visual C++ and created an executable.
 - Implemented 3Phase FCFE cashflow model into a web-application including analytical and historical data, utilizing j2ee, EJB, and oracle back-end
 - Developed business alert system database and web front-end for measurement against benchmarks and account rules, utilizing j2ee, xml, and an oracle back-end
 - Created securities & accounts portal for fixed income investment managers utilizing 3rd party software, Plumtree, j2ee, and an oracle back-end
 - Developed equity research web application which included FactSet market data, j2ee, EJB, queues, and an oracle back-end

CLASS SURVEYS

Course Information (2012-2019)		Course Evaluation	
Sem/Year	Course Title	Teaching Effectiveness	
		Instructor	Dept. Mean
Spring/2019	Business Analytics Programming	4.83	4.26
Spring/2019	Business Analytics Programming	4.60	4.26
Spring/2019	Business Analytics Programming	4.53	4.26
Spring/2019	Investment Modeling R	4.96	4.23
Spring/2019	Investment Modeling R	4.96	3.74
Fall/2018	Investment Modeling R	4.68	3.96
Fall/2018	Investment Modeling R	4.82	3.99
Fall/2018	Analytics Business Intelligence	4.50	4.26
Fall/2018	Analytics Business Intelligence	4.45	4.26
Spring/2018	Investment Modeling R	4.76	3.99
Spring/2018	Investment Modeling R	4.71	4.06
Spring/2018	Business Analytics Programming	4.50	4.18
Spring/2018	Business Analytics Programming	4.30	4.18
Fall/2017	Management Info Systems	4.79	4.02
Fall/2017	Foundation Business Programming	4.19	4.02
Fall/2017	Investment Modeling R	4.21	4.02
Fall/2017	Investment Modeling R	4.45	4.05
Spring/2017	Investment Modeling R	4.61	3.47
Spring/2017	Business Analytics Programming	4.02	4.08
Spring/2017	Business Analytics Programming	4.63	4.08
Fall/2016	Investment Modeling R	4.62	3.61
Spring/2016	Investment Modeling R	4.68	3.75
Spring/2016	Investment Modeling R	4.78	3.90
Fall/2015	Business Research Methods	4.57	3.96
Fall/2015	Investment Modeling R	4.67	3.93
Spring/2015	Investment Modeling R	4.64	3.94
Spring/2015	Info System Security	4.85	3.94
Fall/2014	Investment Modeling R	5.00	3.77
Fall/2014	Investment Modeling R	4.56	4.08
Spring/2014	Investment Modeling R	4.62	3.96
Spring/2014	Investment Modeling R	5.00	4.21
Fall/2013	Excel VBA Investing	4.62	3.98
Spring/2013	Management Info Systems	4.35	3.72
Spring/2013	Management Info Systems	4.55	3.72
Fall/2012	Business Research Methods	4.75	4.03
Fall/2012	Business Research Methods	4.55	4.03

venu GUNTUPALLI

Jersey City, NJ 07302 | (217) 801-6434 | venu.guntupalli@outlook.com

KEY RELEVANT EXPERIENCE

Director, Data Science | Jackson Hewitt Tax Services | Jersey City, NJ January 2020 – Present

Leading org-wide Advanced Analytics product and business development operations, including delivery of AI solutions across a suite of internal products used by 30K employees and consumer products with 2M customers.

- Founded enterprise AI and Cloud ML Ops. teams and continue to expand them across multiple development centers with a net positive divisional ROI in 16 months since founding.
- As a Principal Member of two key steering committees – Product Strategy and Data Governance – partnering with CXO leadership to align Strategic Objectives with shift in consumer preference and industry regulations.
- Conceptualized and led development of a portfolio of sales models, including Discount Optimization and customer LTV, leading to savings of \$1.7M within the first year of deployment.
- Integrated near real-time serving models to drive recommendations in consumer tax products and retail portals, serving over 2M users each year, leading to 3.8% increase in user conversion rate during 2020-21.
- Led a team of Data Science Managers to identify high-risk factors and interactions leading to employee churn at 4K retail stores, resulting in conception & execution of incentives which reduced churn by 12% during 2020.

Manager, Sr. Data Scientist | Altice USA | Long Island City, NY June 2015 – December 2019

Led teams delivering enterprise-scale AI products, driving an annual run rate of \$7M in profitability across Marketing, Sales, Video & Internet Products, Ad sales, CRM, Cloud Infrastructure & Data Integrity.

- Led a team of Data Scientists and Cloud Engineers across three international development centers to migrate enterprise AI stack to Google Cloud, resulting in 17% savings in OpEx over 2018-19 for the AI team.
- Led a team of Data Scientists from Americas and Asia ops. to build a real-time Customer Retention and Animation application, leading to 9% decrease in churn across Non-pay & Voluntary categories over 2018-19.
- Led development of a Video Recommender System for the next-generation TV set-top box (STB) and mobile app. (in A/B testing phase when I left) which was projected to save \$500K/year in vendor licensing fee.
- Led an international team of Data Scientists and Full-stack Developers to create a self-serve app. for Look-alike modeling, leading to savings of \$2M/year for targeted advertising and customer acquisition campaigns.
- Created an Experimental Design tool for A/B Testing, which was used to validate software updates in STB and mobile app. software, leading to, on average, detection of bugs in 32% fewer deployments in 45% less time.
- Developed customer avidity models to derive TV networks' KPIs, which powered dashboards used by C-level executives for negotiating network carriage fee – the biggest expense for Altice USA each year.
- Architected AWS enterprise AI cloud stack and built a proprietary data-pipeline library to automate ETL tasks related to modeling, saving thousands of hours in manual effort for the Data Engineering team over 2015-18.

Data Mining Analyst | AIMSS | Salt Lake City, UT September 2011 – May 2015

Led product planning and architecture to develop an ML application that detected copyright and licensing violations.

- Led a team of Software Engineers to build an online application for pattern-matching across audio, video, and text, which led to 3x increase in lead-generation for rights owners to investigate copyright violations.
- Led migration of on-prem databases to cloud, resulting in 32% savings in OpEx and licensing fee over 2014-15.
- Developed a SaaS for copyright owners to automate generation of Cease and Desist notices upon detection of copyright violations, which led to a 6x increase in removal of infringing content over 2013-15.

Internet Investigator | BSA | Washington, DC February 2009 – August 2011

Performed software development to integrate text analytics in digital forensic analysis and web-scraping applications.

- As a part of the Digital Forensic Analysis team, implemented matrix factorization algorithms to identify and extract information pertinent to civil/criminal cases from among all the subpoenaed email and chat logs.
- Built topic extraction models on data scraped from the “dark web” to identify which BSA member’s product vulnerabilities were being sold, leading to automation of alerting the relevant rights holders for legal action.
- Co-developed a Python application to automate the process of recording WHOIS data of malicious, zero-day ephemeral domains and their hosting web servers, and subsequently generated a directed graph from that data as evidence for law enforcement investigations and criminal proceedings.

KEY RELEVANT TECHNICAL SKILLS

Programming Languages

Python (including NumPy, SciPy, Pandas, and multiprocessing) and SQL (SQL Server, Redshift, BigQuery, and Hive)

Big Data Engineering, Pipelining and Modeling Frameworks

AWS (Boto3, S3, Redshift, EC2, and SageMaker); GCP (Pub/Sub, Dataflow – streaming and batch, Storage, BigQuery, Composer, AutoML, and AI-Platform); Scikit-learn; Keras; and TensorFlow online training and serving

Statistics and Multivariate Analysis

Generalized Linear Models, Power Transformations, Dimension Reduction (MI, SVD, PCA, and Embeddings), Factor Analysis, Statistical Tests, Experimental Design, and Hypothesis Testing

Data Mining and Distributed Machine Learning

Ensemble and Boosted Decision Trees, NLP, Deep Learning (W-D, RNN, CNN, and LSTM), Probabilistic and Parametric models, Time-series Forecasting, Recommender Systems, and Anomaly Detection

EDUCATION

M.S., Business Intelligence and Analytics, Stevens Institute of Technology, Hoboken NJ

M.S., Computer Science, University of Illinois, Springfield IL

B.E., Electronics and Communication Engineering, Osmania University, Hyderabad India

Necdet Gurkan

Curriculum Vitae

Contact

ngurkan@stevens.edu

Education

2019-2023 (Expected) **Doctor of Philosophy, Business Administration**

Stevens Institute of Technology

2019 **Master of Science in Information Systems, The McDevitt Research Fellow**

Le Moyne University

GPA: 3.81

Thesis: This study examines methodical evaluations of alternative CNNs approaches in resource-constrained settings to improve prediction of human mental representation of complex natural stimuli. This research can guide scholars in understanding the applicability of different CNN approaches when using limited computational power. The importance of the study is to show which steps are important in building CNN to capture human mental representations, the power of the different CNN approaches, and to provide guidance for research in resource.

2017 **Bachelor of Arts in Psychology**

Saint Leo University

GPA: 3.54

Major GPA: 3.7

Languages: Turkish (Native), French, and English

Programming Skills: R, Python, MATLAB, and JavaScript.

Honors and Awards

2019-2020 Provost Doctoral Fellowship

2018-2019 The McDevitt Research Fellow

2017 Academic Outstanding Athlete of the Year

2016- 2017 State Conference Honor Roll

2016- 2017 Division 2 ADA Academic Achievement Award

2016-2017	Top 15% Student Athlete GPA (President's Club)
2015-2017	NABC Honor Court Member
2015- 2017	Dean's List, College of Arts & Science
2013- 2017	SLU Athletic Grant
2013- 2017	Pride Award
2013-2017	SLU Merit Award

Research Interest

- Cognitive computational modeling.
- Vision, learning, and memory.
- Integration of cognitive science and technologies.

Research Experience

Summer Research Assistant, Prof. Donchin's Laboratory

Department of Psychology

University of South Florida

2017-2017

Responsibilities: In this role, I was working on investigating the ways to increase speed of BCI in paralyzed individuals. Duties included collecting data, programming, and analyzing data.

Research Assistant, Prof. Donchin's Laboratory

Department of Psychology

University of South Florida

2017(Fall)- 2018 (Summer)

Responsibilities: In this role, I worked on an ego depletion project to exam the possible meditating effect on task performance. Duties included installing EEG on participants, collecting, and analyzing data.

Research Assistant, Memory Laboratory

Department of Psychology

University of South Florida

2017(Fall)- 2018

Responsibilities: In this role, I worked on creating my own experiment to examine mean discrimination of visual system by using MATLAB.

The McDevitt Research Fellow

Madden Business School

Le Moyne University

2018- 2019

Responsibility: Using ensemble of convolutional neural network to predict human natural stimuli categorization in resource-constrained settings.

MICHAEL GUTHAMMAR

Professional Experience

- 2006 - Present **Windeye Partners Inc.** – New York, NY
Partner/Owner
- Windeye Partners provides assistance with business valuations as well as corporate finance and mergers & acquisitions in the United States, Europe, and Asia. Clients include companies, business owners, entrepreneurs, family offices, investment funds and other investors. Common valuation needs include options issuance, gifts of securities, financial reporting, capital raising and business sale. We frequently work in sectors such as biotech/pharma/life sciences, medical devices, healthcare, software/information technology/SaaS, media/communications, consumer products, and food & beverages.
- 2021 - Present **Stevens Institute of Technology, School of Business** – Hoboken, NJ
Adjunct
- Graduate instructor for Corporate Finance and Financial Decision Making courses.
- 1996 - 2005 **Fredericks Michael & Co. Inc.** – New York, NY & London, UK
Managing Director & Shareholder
- Advised publicly and privately held companies regarding cross-border acquisitions, divestitures, mergers, joint ventures, strategic alliances, investment, business valuations and related projects in Europe, the United States and Latin America.
 - Participated in the management of the firm, with specific responsibility for regulatory issues and compliance, including management of U.S. broker/dealer affiliate and FSA regulated UK affiliate company.
- Fredericks Michael Securities, Inc.* – New York (1999-2005)
President & Director
- Managed NASD (now FINRA) registration of company and supervised all securities related activities and compliance. NASD registered supervisor (Series 24).
- Fredericks Michael & Co. Limited* – London (2002-2005)
Chief Executive Officer & Director
- Managed business activities and all aspects of U.K. Financial Services Authority (FSA) compliance. FSA Approved Person.
- 1995 – 1996 **Crédit Lyonnais** – New York, NY
Vice President & Deputy Head of M&A for Americas Region
- Responsible for originating, structuring and negotiating mergers, acquisitions and divestitures in North and South America as part of the Crédit Lyonnais bank group's international M&A organization Clinvest. Market advisory services, perform financial analysis and due diligence, draft memoranda and offering documents, negotiate terms and close transactions.

MICHAEL GUTHAMMAR

- 1989 - 1995 **UI-USA Inc. (Crédit Agricole Merchant Bank)** – New York, NY
Associate / Vice President
- U.S. merchant banking affiliate of the Crédit Agricole group, active in private equity, venture capital, corporate finance and mergers & acquisitions.
 - Responsible for originating, structuring and negotiating cross-border mergers, acquisitions, divestitures, private placements and principal equity investments. Market advisory services, perform financial analysis and due diligence, draft memoranda and offering documents, contact potential investors, negotiate terms and close transactions. NASD registered broker.
- 1987 - 1988 **SK International Securities Corp.** – New York, NY
Associate
- Initiated arbitrage and executed transactions in international bond and equities markets. NASD registered broker.
- 1981 - 1982 **Swedish Army** – Uppsala, Sweden
Sergeant, Staff & Communications School

Education

- 1985 - 1987 The Wharton School, University of Pennsylvania – MBA in Finance and Corporate Policy
- 1982 – 1985 Stockholm School of Economics (Stockholm, Sweden) – B.S. in Finance and Economics

Other Information

Certified Valuation Analyst (CVA) member of the National Association of Certified Valuators and Analysts (NACVA)
Member of the New York State Society of CPA's (NYSSCPA)
Member of the Licensing Executives Society (LES)
Fluent in Swedish, proficient in French, basic German and Spanish, beginner Mandarin
Chairman and Co-Founder of American Friends of Stockholm School of Economics, a 501(c)(3) organization

Danny Ting-Yi Ho**Senior Process Automation Engineer**

Mr. Ho is an expert in process automation, process innovation, systems integration, technology assessment, and solution design. He has years of experience designing and implementing large and complex automation solutions including self-service automation, order validation and adjustment, employee compensation services, mortgage application services, WC claim processing, account reconciliation, analysis, and reporting services, vendor invoicing and customer compensation processing, and pension/compensation claim processing. Mr. Ho has led automation engagements in the oil and gas industry, food and beverage industry, pharmaceutical companies, financial services companies, information and publishing industry, and airline companies. He is currently lead developer at Global Automation Innovation Unit of IBM.

Experience**2015 – Present | Solution Designer / Lead Developer, IBM Global Innovation Unit (Numerous Clients)**

Mr. Ho leads automation development teams and advises on process innovation and automation strategy. He coordinates development across geographical regions. He helps clients on identifying automation opportunities, defining project scope, determining project complexity, creating project plans and acquiring resources. He designs and develops automation solutions. He specializes in automating enterprise applications such as SAP, Salesforce, Oracle, and proprietary enterprise applications. He has experience integrating RPA with workflow systems and web services. He builds human-automation communication via email, SMS, messaging service, and web application. He has applied various AI technologies in automation solutions, e.g., using OCR engines for data extraction, training AI models for recognizing document types, applying data analytics for proactive risk handling. He builds automation modules for automating data manipulation and migration. He also develops for automating L1/L2 RPA support operations and facilitating “Human-in-the-Loop”. He defines RPA development best practices and RPA agile development methodology. He assesses new automation technologies and develops PoCs and MVPs for product showcase and client engagement. He enjoys mentoring junior developers inside and outside of the projects.

2007 – 2015 | BPM Consultant, Center for Business Process Innovation

Mr. Ho provided advisory and training service on process optimization, change management, work-flow automation, performance assessment, and risk controlling. His responsibilities in the advisory service included: Process Investigation (conducting full-scale process investigation, data collection, process documentation, and preliminary analysis), Process Evaluation (identifying performance bottlenecks, security loopholes, and invalid controls; and, proposing process improvement solutions and technological requirements), Project Planning and Deployment (defining project goals, milestones, and timeline; and, coordinating project resources, activities, and communication between business and IT stakeholders while translating business requirements into IT support objectives/SLAs), and Metrics Development (developing key process performance and risk indicators for continuous monitoring and improvement). His responsibilities in the training service included: co-organizing BPM training events, co-edited BPM training materials, teaching the fundamentals and cutting-edge technologies of BPM and ORM, co-editing industry case studies, demonstrating the development of BPM applications, and

demonstrating the analytical capabilities of BPM systems.

2007 – 2015 | Adjunct Professor, Stevens Institute of Technology

Mr. Ho taught graduate courses in the Master of Information Systems program, which included Process Innovation and Management (introduction to process mapping, process evaluation, process redesign, and process management issues), BPM and Workflow Implementation (introduction to workflow management systems, process modeling and execution languages, workflow implementation, process simulation, and process mining) and Data Warehousing and Business Intelligence (introduction to database systems, logical and physical database design, data modeling, dimensional modeling, data staging (ETL), and data visualization). He taught on-campus and off-campus, in both face-to-face and remote environments; and, he regularly gave guest lectures on Process Automation and Compliance & Risk Management in the undergraduate and master's programs.

2013 | BPM Consultant, Appian Corporation

Mr. Ho provided consulting services on designing and developing enterprise applications on the Appian Enterprise Application Platform. His responsibilities included customer engagement, requirements gathering, process design, content design (tempo feed, record, report), database design, business rule design, application development, and application deployment.

2012 – 2013 | Lecturer, Kean University

Mr. Ho taught undergraduate and graduate courses in Java and Web Programming, Object-oriented System Design, Database Systems and Data Warehousing, Enterprise Architecture and System Integration.

Education

Ph.D., Technology Management, Stevens Institute of Technology

M.S., Information Systems, Stevens Institute of Technology

B.B.A., Finance, Pace University

Certifications and Skills

- Blue Prism Professional Developer
- IBM Certified Cloud Application Developer
- SAS Certified Base Programmer
- RPA Platforms: Blue Prism, WinAutomation, UI Path.
- BPM Platforms: Appian, TIBCO Business Studio, IBM BPM.
- Programming Languages: .Net (VB/C#), Java, Javascript/JQuery/Node.js/HTML, PHP, Python, SQL
- Scripting Languages: VB script, Powershell, SAP script, Excel macro.
- Modeling Languages: BPMN, UML, EPC, XPDL.

Contact Information

(201) 893-8766

tingho@yahoo.com

<https://www.linkedin.com/in/dannytho/>

THERESA HOWARD

HOBOKEN NJ 07030

201.798.2230 | theresa@thepressrepublic.com

www.thepressrepublic.com



The Press Republic, Founder

Journalist's Eye. Creative Mind. Business Sensibility. Specialties: Copywriting, Editorial Content and Strategy, Social Media, Trendspotting, Super Bowl expertise. Excel at team building, creative concepts, events and writing.

March 2011 – Current, Hoboken, NJ

Oversee operations, new business and content creation for clients, including advertising agencies, brands and universities:

- Develop and write internal communications strategy for Accenture Song
- Lead creative on internal website for FCB
- Develop event, supporting collateral, social and advertising for #HobokenMutzfest
- Develop content submissions for Cannes Lions International Festival of Creativity
- Marketing lead for Stevens Institute of Technology School of Business
- Create and execute national PR strategy for BBDO Super Bowl advertising



Stevens Institute of Technology, Adjunct Professor

Fall 2021 – Current, Hoboken, NJ; 2012-2015

- Professor of Marketing, Introduction to Marketing Course. Advisor for year-long Senior Design Course. Instruct Honors students for seminar course in Business.
- Content Strategy and creative to reposition School of Business (2011-2014)



Accenture Interactive, Copywriter

December 2021 – September 2022; Spring 2019

- Assist Interactive Marketing on internal communications throughout the launch of Accenture Song.
- Editor in Chief, Cannes Lions Digital Doggy Bag, 2019



FCB Global, Lead Creative, Design and Copy, Global Communications

April 2019 – July 2023, New York City

- Design, write and implement internal site for global communications best practices
- Creative awards preparations; internal communications
- Cannes Lions newsletters



R/GA, Copy Director

April 2011 – July 2012, New York City

- Walmart: Oversee editorial strategy for Walmart Facebook; including daily posts, asset curation and creation and seasonal holidays. Develop and support editorial

strategy for Meal Solutions App., Average impression per update; 2.5 million; Fan growth of 340% to 11 million+

- Verizon: Oversee editorial strategy for verizonwireless.com including upper and lower funnel purchase flows and editorial content for "Share Everything" plan



Crispin, Porter + Bogusky, Copywriter, Social Media

September 2009 – April 2011, remote reporting to Boulder, Colorado

- Develop social media scripts and strategies for Old Navy, Kraft Macaroni & Cheese and Coke Zero
- Craft social brand voice to integrate with traditional media
- Develop and write copy for Old Navy mobile marketing; double subscription base
- Present agency-wide seminar on social media strategy



USA Today, National Advertising and Marketing Reporter

September 2000 – 2009, New York City

- Cover consumer marketing and advertising trends; write weekly advertising column
- Report on executive changes, earnings and business transactions
- CEO-level and celebrity interviews including Steve Jobs; Virgin Chairman and Founder, Sir Richard Branson; Derek Jeter; 50 Cent; Joe Torre and Rudolph Giuliani
- Appearances on Fox, The Today Show, Bloomberg News, CNN, GMA
- Lead reporter on the Cannes Lion International Advertising Festival
- Lead coverage on the Super Bowl, including Ad Meter



Brandweek, Senior Editor

May 1998 – September 2000, New York City

- Break news stories and cover marketing strategies of beverage, fast food, and wines and spirits industries for weekly publication
- Write features and departmental profiles on programs and executives



Nation's Restaurant News, Marketing Editor/Conference Director

April 1991 – January 1998, New York City

- Develop and curate national conferences, including program, and awards
- Cover marketing and advertising strategies of the Top 100 foodservice companies
- Interview CEOs and CMOs for news and marketing stories; break national news, wrote in-depth quarterly analysis and financial stories, identify food trends
- Write general assignment, financial and feature stories, develop leads and uncover news stories on leading restaurant companies including mergers and acquisitions

EDUCATION



Baruch College, Zicklin School of Business MBA, Marketing



State University College at Cortland, Bachelor of Arts in English



COMMUNITY

Director, Children with Special Needs, Hoboken Family Alliance

Jujun Huang

Stevens Institute of Technology
School of Business
1 Castle Point Terrace, Hoboken, NJ 07030

updated June. 2024
Email: jhuang21@stevens.edu
Phone: 551-240-9507
Website: <https://jhuang2023.github.io/>

EDUCATION **Stevens Institute of Technology** Hoboken, NJ
Ph.D. in Business Administration Jan. 2019 - May. 2024
Information Systems & Analytics Concentration
Dissertation: *More than Words: Mining Managerial Disclosures for Hidden Cues*
Committee: Rong Liu (chair), Ying Wu, Bei Yan, Majeed Simaan, Zhongju(Jhon) Zhang

M.S. in Business Intelligence & Analytics May 2018
Data Science Concentration

Shanghai University of International Business and Economics Shanghai, China
B.B.A. June 2014

RESEARCH Design Science
Research Method: Natural Language Processing, Deep Learning
Applied Area: FinTech, Social Media Analytics

PUBLICATION *Published Paper*

Liu R., Huang J., Zhang Z. (2022). Tracking Disclosure Change Trajectories for Financial Fraud Detection, *Production and Operations Management*.
Doi: 10.1111/poms.13888

Working Papers

Huang J., Liu R., Wu Y., Henry E., and Yang W. More than Words: Quantifying Skepticism toward Firm's Fundamentals, finalizing submission to *Contemporary Accounting Research*.

Wilkenfeld J. N., Yan B., Huang J., Luo G., & Alga K. AI in Love with You: Linguistic Convergence in Human-Chatbot Relationship Development, in preparation for submission to *Journal of Computer-Mediated Communication*.

Peer-reviewed Conference & Workshop Papers

Huang J., Liu R., Wu Y., and Yang W. (2022). More than Words: Quantifying Colloquial Skepticism toward Firm's Fundamentals, *Financial Management Association (FMA) Annual Meeting. 2022*.

Wilkenfeld J. N., Yan B., Huang J., Luo G., & Alga K. (2022). AI in Love with You: Linguistic Convergence in Human-Chatbot Relationship Development, *Academy of Management (AOM) Proceedings. 2022*.

Huang J., Liu R. (2021). Leveraging Disclosure Change Trajectories to Detect Financial Frauds, *Workshop on Information Technology and Systems (WITS).2021. (Best Student Paper Award)*.

On-going Projects

Huang J., Liu R. Interpreting Market Risks with Deep Learning Method, (Experiment Stage)

HONOR & AWARD	Best Student Paper Award in Workshop on Information Technology and Systems (WITS) Dec. 2021
	Graduate Assistantship in Stevens Institute of Technology 2019 – Present
	Master’s Fellowship, Stevens Institute of Technology 2016
PRESENTATION	<p>More than Words: Quantifying Colloquial Skepticism Toward Firm’s Fundamentals <i>Financial Management Association (FMA) Annual Meeting</i> Atlanta, GA Oct. 2022 Texas State University, San Marcos, TX Apr. 2023 Baruch College, CUNY, New York City, NY May 2023 University of Massachusetts - Boston, Boston, MA June 2023</p> <p>AI Love with You: Linguistic Convergence in Human-Chatbot Relationship Development <i>Academy of Management (AOM) Annual Meeting</i> Seattle, WA Aug. 2022</p> <p>Leveraging Disclosure Change Trajectories to Detect Financial Frauds <i>Workshop on Information Technology and Systems (WITS)</i> Austin, TX Dec. 2021</p>
TEACHING EXPERIENCE	<p>Instructor, Stevens Institute of Technology Business Intelligence and Data Integration, MIS-634 2022 / 2023 / 2024-Spring <i>Master core course Teaching Evaluation: 4.0 / 5.0</i></p> <ul style="list-style-type: none"> - Taught weekly lectures about business intelligence and relational/ non-relational databases (ER modeling, dimensional modeling, ETL, data visualization, etc.) - Provided tutorials about the operation of database and data analysis tools, such as Erwin, Alteryx, MongoDB, Tableau - Designed course materials, in-class exercises, and homework <p>Teaching Assistant, Stevens Institute of Technology Web Mining, BIA-660 2021 <i>Master core course</i></p> <ul style="list-style-type: none"> - Assisted 150+ students to learn and understand Python programming, natural language processing, text classification, text clustering, topic modeling, and sentiment analysis
SERVICE	<p>Journal and Conference Review</p> <ul style="list-style-type: none"> International Conference on Information Systems (ICIS) 2024 Workshop on Information Technology and Systems (WIST) 2023 Conference on Information Systems and Technology (CIST) 2023 Machine Learning with Applications 2023 Machine Learning with Applications 2022 INFORMS Workshop on Data Science 2022 IEEE International Conference on Services Computing 2021
NON-ACADEMIC EXPERIENCE	<p>Data Science Intern, United Nations New York City, New York Mar. 2018 – Sep. 2018</p> <ul style="list-style-type: none"> - Applied advanced natural language processing techniques to process text data - Built models by combining several algorithms (SVM, XGBoost, etc.) - Provided artificial intelligence solution to textual classification for the UN’s website <p>Marketing Researcher, InsightWorks Ltd. Shanghai, CN Jan. 2015 – May 2016</p> <ul style="list-style-type: none"> - Advised clients, including L’Oréal & Unilever, on product research and development - Conducted research projects, including questionnaire design, fieldwork, and data

analyzing

- Analyzed consumer datasets with SQL and Excel to identify areas of improvement, or develop solutions
- Wrote reports for product improvement, marketing strategy, and new product launches

SKILL

Analytics Tools: Python (PyTorch, Tensorflow, Scikit-Learn), STATA, Alteryx, SAS

Visualization: Tableau, Qlik Sense, Python, Power BI

Database: MongoDB, SQL

REFERENCE

Rong Liu, Ph.D.

Associate Professor of Information Systems

School of Business, Stevens Institute of Technology

1 Castle Point Terrace, Hoboken, NJ 07030

Email: rliu20@stevens.edu

Ying Wu, Ph.D.

Associate Professor of Finance

School of Business, Stevens Institute of Technology

1 Castle Point Terrace, Hoboken, NJ 07030

Email: ywu4@stevens.edu

Zhongju(Jhon) Zhang, Ph.D.

Professor of Information Systems

W. P. Carey School of Business, Arizona State University

300 E Lemon St, Tempe, AZ 85287

Email: zhongju.zhang@asu.edu

SHENGYU (HENRY) HUANG

shuang52@stevens.edu | (626) 360-5957

EDUCATION

STEVENS INSTITUTE OF TECHNOLOGY, SCHOOL OF BUSINESS Doctor of Philosophy in Financial Engineering <i>GPA: 4.0/4.0</i>	Hoboken, NJ Expected 05/26
NEW YORK UNIVERSITY, TANDON SCHOOL OF ENGINEERING Master of Science in Financial Engineering <i>GPA: 4.0/4.0</i>	New York, NY 09/21 - 05/21
UNIVERSITY OF SOUTHERN CALIFORNIA, VITERBI SCHOOL OF ENGINEERING Bachelor of Science in Industrial and Systems Engineering, Minor in Business Finance <i>GPA 3.9/4.0</i>	Los Angeles, CA 08/15 - 05/19

HONORS

• Managing Director - Data Science of the NYU FRE Bulls & Bears Club	09/20 – 05/21
• NYU Tandon Merit-Based Scholarship (Worth \$8,000 Yearly)	08/19
• Vice President of ISE Honor Society Alpha Pi Mu, USC Chapter	06/18
• Best Track Paper for Financial Engineering at IEOM Washington DC Conference	09/18
• Dean's List of USC Viterbi School of Engineering	08/15 - 05/19

COURSEWORK

-
- Mathematics & Statistics: Linear Algebra, Probability Theory, Mathematical Statistics, Time Series Analysis, Probability Theory, Stochastic Process and Calculus
 - Programming: Data Cleaning and Predictive Analysis using R/Python, Database Management in SQL, Classical Machine Learning, Deep Learning
 - Finance: Corporate Finance, Financial Analysis & Valuation, Investment, Financial Derivatives, Risk Management, Active Portfolio Management, NLP in Investment Process

TECHNICAL SKILLS

-
- Languages & Software: R, Python, SQL, Zeppelin, MATLAB, Spark, SAP, Drupal, Tableau
 - Demonstrated skills in financial valuation and predictive analysis

RESEARCH & ACADEMIC PROJECTS

NEW YORK UNIVERSITY, New York, NY <i>Independent Research, Calibration of ADOL Model Using Artificial Neural Network</i>	07/20 -
<ul style="list-style-type: none">• Trained an ANN to inversely estimate Heston & ADOL Model parameters from market data.• Cleaned and prepared artificial data for ANN training.• Fed true market data to the ANN and optimize Heston model parameters from ANN outputs.	
<i>Capstone Project, Deep Learning Based BSDE Solver for Pricing Bermudan Swaption Under LMM</i>	06/20 - 08/20
<ul style="list-style-type: none">• Simulated Libor Rate under the Libor Market Model in Python.• Built a neural-networks-based backward stochastic differential equation (BSDE) solver in Python, TensorFlow for European and Bermudan swaption pricing, and benchmarked against Monte Carlo in accuracy, variance and speed.	
<i>Semester Project, FRE 6103 Financial Risk Management</i>	02/20 - 05/20
<ul style="list-style-type: none">• Predicted S&P 500's next day return using LSTM and XGBoost.• Applied long-short strategy on S&P 500 ETFs and outperformed the market.• Conducted a stress test on strategy performance.	
<i>Semester Project, FRE 9733 Big Data in Financial Engineering</i>	02/20 - 05/20
<ul style="list-style-type: none">• Applied Spark and Zeppelin Notebook for big data processing tasks and utilized Google Cloud for cloud computing.• Built models including logistic regression, random forest, ITEM and convolutional neural network models on a precompiled mortgage dataset and predicted default probabilities of each mortgage.• Optimized models with hyperparameter tuning techniques to improve model performance on unseen data.	
<i>Solo Projects, FRE 7773 Machine Learning in Finance</i>	09/19 - 12/19

- Imputed imbalanced datasets using SMOTEENN and applied classical machine learning techniques including decision tree, random forest, PCA, logistic regression and gradient boosting to predict company bankruptcy.
- Predicted next day stock return by building multi-layer neural networks with recurrent, convolutional and dense layers in Python, TensorFlow.

UNIVERSITY OF SOUTHERN CALIFORNIA, Los Angeles, CA

Team Leader, USC Undergrad Financial Engineering Group with Dr. Cesar Acosta 08/17 - 05/18

- Utilized R for mixture-based risk estimates of stocks.
- Presented new model and published paper at IEOM Washington DC Conference.

Group Member, Semester Project, Course FBE 421 Financial Analysis and Valuation 01/18 - 05/18

- Performed market research and SWOT analysis for Netflix.
- Built DCF & Relative Valuation Models and developed Football Field Analysis to predict stock price.

Group Member, Semester Project, Course DSO 435 Enterprise Data Structure 08/17 - 12/17

- Designed Entity Relationship Diagram and Canonical Data Model in MS Visio for USC ASC Club.
- Created and optimized a database using Oracle 11g; Handed over to client for deployment.

WORK EXPERIENCE

NEW YORK UNIVERSITY, New York City, NY

Teaching Assistant, FIN 2203 Corporate Finance, FRE 6073 Introduction to Derivative Securities 09/19 -

- Held 16 office hours weekly and managed the Piazza forum.
- Guided students' research paper and projects on finance topics.
- Guided students on IAQF 2020 competition projects.

DHL E-COMMERCE, Los Angeles, CA

08/18 - 12/18

Operations Intern

- Collected shop floor data and interviewed workers to find bottlenecks in sorting.
- Redesigned the Process Map and drew a Value Stream Map.
- Built an Arena model to validate the new sorting section design.
- Proposed a new shop floor plan with 20% increase in efficiency and presented to senior IE manager.

MAY & COMPANY, Berlin, Germany

06/18 - 08/18

Summer Operations Intern

- Designed and launched a budget and control system to oversee monthly performance.
- Prepared monthly profit and loss analysis and presented to management.
- Streamlined operations by creating templates and defining business best practices.

WAYNE HUANG

(973) 727-7741 • wayne.j.huang@gmail.com • Montville, NJ 07045

Data science leader with a proven track record at Fortune 500 and FinTech companies. Demonstrated success in leading data science teams and collaborating with functional leaders to achieve tangible and impactful business outcomes. Adjunct professor, author, and invited speaker at data science conferences.

PROFESSIONAL EXPERIENCE

PACIFIC LIFE INSURANCE COMPANY • New York, New York • 2020 – Present

HEAD OF DATA SCIENCE

Build and lead a data science team at the Institutional Division. Work with Product, Pricing, Sales, Marketing, and Operations business leaders to develop analytics vision, strategy, and project roadmap. Oversee machine learning and data engineering projects including mortality predictive model, price optimization model, sales prospect scorecard, customer segmentation and campaign response model, stable value cashflow forecast model, underwriting automation, and streamlined onboarding process.

Selected Projects:

- Pension Mortality Predictive Model – The model provides a superior pricing assumption for risk selection.
- Sales Prospect Scorecards – Built an industry-first solution to automate the identification of high-potential pension and defined contribution plans to help the division execute the direct-to-plan-sponsor strategy.
- Automated the client onboarding process to save time, standardize the process, and increase data quality.

SPRUCE (spruce.co) • New York, New York • 2018 – 2020

HEAD OF DATA SCIENCE

Built and led a data science team. Drove title underwriting AI platform initiatives. Led the development of robotic search automation, OCR, NLP, predictive underwriting, reinforcement learning, and a rules engine using Python on the Google Cloud Platform. The new product drastically reduced the title search and underwriting cost, risk, and time from 3 days to within one hour. The products were successfully rolled out in Florida and California.

PRUDENTIAL FINANCIAL, INC. • Roseland, New Jersey • 1999 – 2018

HEAD OF PREDICTIVE ANALYTICS • 2012 – 2018

Built and led the data science and data governance teams at Group Insurance. Created analytics vision, strategy, roadmap, and projects that transformed the data management and analytics practice for the \$5 billion Group Insurance business. Directed and oversaw the entire ML project lifecycle from analytics idea exploration, project selection, data collection, feature engineering, model development and evaluation, and model implementation, to business impact analysis. Established a data governance council and policies to ensure data quality, accountability, and ETL process transparency. Presented analytics updates to C-level leaders. Hired, developed, and led analytics talents with advanced degrees.

Selected Projects:

- Customer Journey Analytics - Built customer segmentation and campaign response ML models. Conducted channel preference, penetration, conversion analysis, and web analytics using CRM and Google Analytics data. Significantly increased new acquisition, cross-sell, and up-sell for the business.
- Predictive Underwriting Model – The ML model automated underwriting decisions from 30 days to one day and maintained the same quality of risk selection.

DIRECTOR OF INFORMATION SYSTEMS • 1999 – 2011

Started as Project Manager, promoted to Systems Manager, and then Systems Director. Responsible for business intelligence, data warehouse, life, and disability claims applications. Directed application development, deployment, and infrastructure planning in a distributed computing and Web environment. Collaborated with Sales and Operations to ensure the alignment of IT and business objectives.

TEACHING EXPERIENCE**STEVENS INSTITUTE OF TECHNOLOGY • Hoboken • New Jersey • 2013 - Present****ADJUNCT PROFESSOR****MEMBER OF ADVISORY BOARD – Business Analytics Program**

Teach Process Innovation (MIS710) and Data Management (MIS630) at the MSIS Program.

UNIVERSITY OF DAYTON • Dayton • Ohio • 2021 – 2022**ADJUNCT PROFESSOR**

Teach Advanced Business Analytics (BAN618) at the Business Analytics Program.

COLUMBIA UNIVERSITY • New York • New York • 2018 – 2021**ADJUNCT PROFESSOR**

Teach Capstone Project (PS5900) and Data Management (PS5400) at the Applied Analytics Program.

EDUCATION**Ph.D., Information Management • Stevens Institute of Technology • Hoboken, NJ**My research was focused on decision automation algorithms and user acceptance statistical analysis
Recipient of Outstanding Ph.D. Dissertation Award**MBA, Management Information Systems • State University of New York at Albany • Albany, NY**

Recipient of Rockefeller Institute Research Fellowship

BS, Civil Engineering • National Central University • Taiwan**RESEARCH & TEACHING INTEREST**

- **Research Topics:** Reinforcement Learning, Machine Learning, AI Process Innovation
- **Teaching Interests:** Reinforcement Learning, Machine Learning, Process Innovation, Data Management

SELECTED PRESENTATIONS & PUBLICATIONS

- Liu, T., Huang, W. "A Multi-Goal Reinforcement Learning Framework" (working paper)
- Author, "Transforming Insurance Business with Data Science" In S. D. Koseoglu (Ed.). "Financial Data Analytics: Theory and Applications", Springer, Cham, Switzerland (2022)
- Panelist, "Become the Data-Driven Digital Insurer", Reuters (2021)
- Presenter, "Enable Marketing Strategy Using Analytics", Predictive Analytics Forum, Amsterdam (2018)
- Presenter, "Data Science Challenges & Roadmap", Big Data & Analytics for Banking Summit, NYC (2017)
- Presenter, "Creating Value Through Analytics Innovation", Predictive Analytics World, NYC (2017)
- Presenter, "Insurance In The Age of Big Data", CAA-SOA Executive Exchange Program, Newark, NJ (2016)
- Presenter, "Optimizing Global Analytics Opportunities", CDO Executive Summit, Jersey City, NJ (2015)
- Author, "Business Process Rules Management", ISBN 3838353269, Lambert Academic Publishing (2010)
- Sherry X. Sun, Wayne Huang, Sherry Zhou, "Data Quality Assurance in Workflow Management", presented at the 13th International Conference on Information Quality, MIT, Boston, MA (2008)
- Herbert A. Simon Best Research Paper Award, Wayne Huang, Edward A. Stohr, "Design and Implementation of a Business Process Rules Engine", presented at the 2nd International Conference on Design Science Research in Information Systems and Technology, Pasadena, CA (2007)

DR. Suji Iyer, M.A., M.B.A, Ed. D.

Phone: 201 723 5121 | siyer1@stevens.edu

AREAS OF RESEARCH AND TEACHING INTERESTS

I'm a scholar practitioner for more than 20 years specializing in Program Management, Organizational Development, Organizational Behavior, Business Strategy and Policy, Performance Management, Talent Development, Program Evaluation, Adult Learning Principles, Workplace Learning, Workforce Strategies, Leadership Development, and Portfolio Management.

In the past two decades, I've led enterprise demand and release lifecycle projects that aligned business goals with technology solutions to drive CIO/CFO Portfolios. I've successfully built cross portfolio PMO CoEs and Community of Practice (CoP) initiatives to effectively inform multiple lines of businesses, stakeholders, and the user community at large. I bring along two decades of complex relationship building strategies, evidence based research models, and risk assessment tools that focus on service excellence. I've engaged the leadership team with visually stunning business presentations. SharePoint Portals, Newsletters, and eCards.

My teaching experience spans across programs taught on multiple modalities by fostering active discussions and team activities, effectively using online course delivery tools. My journey began by establishing a satellite-learning center of executive business education for the IGNOU (Indira Gandhi National Open University) in Chennai. Since then, I've developed many strategic online pedagogical models to effectively deliver core curriculum for a variety of distance delivery modes. I've consulted in developing and launching faculty development programs at the respective institution's Centers for teaching excellence in providing toolkits for adequate and frequent feedback to discussions, keeping course content up-to-date, modifying online course content to meet individual student needs, and effectively selecting and using appropriate online tools to support online instruction.

Education: <ul style="list-style-type: none">• Ed. D. Educational Leadership and Management, Drexel University (2014)• M.B.A, Centenary University (2011)• Master's in Psychology, Madras University (1992)	Certifications: <ul style="list-style-type: none">• PROSCI – Certified Change Practitioner (2018)• TLC - Certified Facilitator in The Leadership Challenge© (2017)• DDI© Development Dimensions International (2017)• InsideOut Coaching© (2017)• Certificate in Project Management© from Stevens Institute of Technology (2008)
--	---

ACADEMIC EXPERIENCE

Adjunct Faculty of Business Management (2014 –present)

Stevens Institute of Technology, Hoboken, New Jersey

- Courses: MGT 609 (Project Management), MGT 609 CU (China, Blackboard & Canvas), MGT 613 (Project Portfolio Management) EMT 635 (Managerial Judgment and Decision Making)
- Workshops: Industry Job Search for Doctoral Students Spring semesters (2018- present)

Organizational Effectiveness/Faculty Development Consultant (January 2017- August 2018)

Hackensack Meridian Health and Medical University

- Facilitated Faculty development programs in Seton Hall medical University, co-ran the curriculum and program development teams. Served as an expert educational advisor in the Human Dimensions program committee with the focus on Community assessment, and Social indicators.

Co-Director, (Jul 2015 - December 2016)

Rutgers University/ New Jersey Healthcare Talent Network

- Partnered with the NJ Department of Labor in developing workforce strategies to focus on the specific training needs of key industries in the state in order to connect employers, job seekers, and educational institutions.
- Developed High-Quality, Employer-Driven Partnerships to identify industry valued-credentials. Acting as a Center of Excellence of effective practices, strategies, tips and resources for implementing key performance processes.
- Developed a career pathway (Healthcare Project Specialist) that aligns with Project Management functions in a clinical environment. Serving as a center for excellence in offering leadership resources to cultivate internal talent in organizations and building fresh strategies to align health care talent with the changing demands of this key sector of New Jersey's economy.
- Served as a Skills4Jersey consultant to healthcare systems in developing a succession pipeline, leadership development programs, and conducting competency review.

Professor of Management Studies /Assistant Coordinator of Distance Education (December 1992 – April

1997) Indira Gandhi National Open University, Chennai

- *Courses taught: Small Business Development, Business Administration, and Human Resources Management*

Professor of Psychology (December 1995 – April 1997) MGR Medical University, Chennai

- *Courses taught: Social Psychology, Developmental Psychology*

INDUSTRY EXPERIENCE

Senior Change Strategy Consultant

EHRM-IO, Veterans Affairs (October 2023 - Present), Washington D.C

- Develop and maintain the overall readiness strategy for EHR (Oracle) initiative impacting the entire VA is transitioning to a new electronic health record (EHR) system — the software that stores health information and tracks all aspects of patient care.
- Evaluate impacts of change initiative and needs, designed approach, and executed activities including communication, workforce transition, change management, leadership alignment, readiness training, competency workshop facilitation.
- Coach senior leaders to create future state organizational structure as part of change management activities and to be instrumental leaders within their business unit related to operational change.
- Present transformation strategy and revised communication plan for implementation of Captain James A. Lovell Federal Health Care Center for March 2024 go-live.

Change Management Communications Projects (Consultant)

Randstad, (March 2023 - September 2023) Atlanta, GA

Led change management initiatives for Digital Talent Acquisition and Salesforce CRM implementation along with Accenture. Strategized and planned project work streams, conducted deep dive sessions, Developed training modules by personas and drafted training and communication timelines. Built Manufacturing and logistics new operational model, developed competencies and goals. Identified current state gaps and created job description review by partnering with the HR business team to build a phased approach.

Organizational Change Manager (Consultant)

Hologic (September 2022 - March 2023) Marlboro, MA

Led enterprise-wide capacity planning, Demand Management (ServiceNow), Release and test management(Plabview), PMO optimization, change and communication channels to drive successful implementation.

- Liaised with ITLT Leadership on Portfolio prioritization, Integrations, and capability building in North America, APEC, and Europe.
- Implemented change impact and adoption strategies and approaches in Demand management lifecycle (Planview©), Salesforce (R1) Release and (ServiceNow©) Test Management Lifecycle.
- Used Microsoft Power Suite of tools to analyze issues and identify root causes to help resolve. Build a Problem Management process based on ITSM problem lifecycle.
- Maintained training calendar and Community of Practice sessions to bridge Knowledge Management Best Practices across IT.
- Planned and Implemented communication and training strategies to Hologic business and IT communities.
- Maintained Demand Management Corporate Portal on SharePoint©

Organizational Change Management (Consultant)

Verizon, (August 2019 – August 2022) Lake Mary, Florida

- OCM Lead for 1 ERP - SAP 4 HANA implementation training and communications, Global Digital Solutions automation Program Newsletters, Role based training, Communities of practice, BI CoE for Qlik, Looker, and ThoughtSpot.
- Served as the Global Finance Data Analytics OCM Manager and am responsible for communications cadence for internal all hands, project teams, steering committees, and external stakeholders.
- Partnered with clients to implement new technologies and platforms such as Salesforce, SAP S/4HANA and Oracle Cloud ERP which allowed organizations to standardize their systems and processes and automate core business functions.
- Formulated and maintained the change management strategy; executed activities including change impact assessments, change readiness assessments, training (designed quick reference guides and instructor-led training), communication, etc.

Senior Change Partner, Organizational Transformation

Advent Health, (September 2018 – July 2019), Altamont, Florida

- Partnering with functional leaders and project teams to drive business-critical change initiatives and Change capabilities across leadership down lines.
- Implementing talent strategies and governance processes by creating change plans to minimize employee resistance and maximize employee engagement by driving faster adoption and higher proficiency.
- Engaging functional leaders at all levels to ensure desired business results through right structure, design and sustainment.
- Integrating AHS cultural framework (mission, vision, values, service standards) to shape and synchronize communications throughout change projects.

Director, Learning & Organizational Effectiveness

RWJ Barnabas Health (January 2007 – August 2018), West Orange, New Jersey

- Spearheaded HR transformation by implementing a broad range of human resources systems and ERP people systems to manage, track, and provide predictive analysis to support workforce planning, talent management, and culture.
- Established RWJ BH Corporate University to transform and integrate learning and development approach for system-wide instructor led training, online self-study, in-services, certifications and grant partnerships.
- Collaborated with the office of Diversity and Inclusion to create Team Member Resource Group to accomplish Annual HEI accreditation for 7 of the 11 HMM hospitals, pursue HEI participation for the 4 remaining hospitals, and improve community engagement.
- Co-chaired the Leadership Institute programs in partnership with NYU and Stevens Institute of Technology with thirteen scenario based cross-disciplinary pedagogies.

ACADEMIC/PROFESSIONAL PRESENTATIONS/PUBLICATIONS

“Why Employee Engagement is a stronger differentiator in Higher Education”, CampusWorks White paper, May 2024

“HRD: Looking to the Past, Shaping the Future” 15th International HRD conference, Edinburgh University, Midlothian, Scotland, June 4, 2014

“Building an open Enrollment Library for an Healthcare Organization”, Healthcare Source Learning Symposium, Nashville TN, June 2012

“Adult Learning Theory for Healthcare Educators”, E-Learning Education Forum, Springfield, MA, March 8, 2011

“Standardizing and Modernizing Learning Assets Development in Organization”, Advanced Distributed Learning, Baltimore, MD, April 2008

“Managing Ubiquitous Learning Assets”, Advanced Distributed Learning, Baltimore, MD, April 2007

“Career Development for Urban and Rural Women through Open Universities”, IWSA, Chennai, July 1996

DONALD J. JENKINS, PH.D.Mobile (617) 686-0649 • donald.jenkins001@gmail.com • <https://www.linkedin.com/in/jenkinsdonald>**SUMMARY**

Experienced data analytics strategist with a consistent history of driving data-centric strategies and promoting a culture of informed decision-making. Aspiring to harness my extensive background in data analytics, team management, and strategic thinking to make meaningful contributions as a Data Consultant. My objective is to provide expert guidance that enables digital transformation, uncovers actionable insights, enhances operational effectiveness, and empowers customers to achieve their goals.

STRENGTHS

**Transformational Change Leadership / Data Science & Analytics / Storytelling with Data
Operational Excellence / Process Improvement / Team Development & Mentoring**

PROFESSIONAL EXPERIENCE**PRINCIPAL - DATA DRIVEN DECISION ADVISORS, LLC, FOXBORO, MA**

2019 - Present

Helping companies bring data-driven order to chaotic business challenges.

Founded LLC to help clients operationalize their data, developing tools and processes to enable data-driven decisions in all business activities while guiding teams to understand business processes and elevate data governance. Recognized as Leading Data Consultant for North America 2022 by Chief Data Officer Magazine. Experienced in Python, R, Tableau, SQL, QGIS, Gurobi, and Excel, as well as both Google Suite and Microsoft Office.

Some examples of customer projects include:

- Stabilized financial operations of a tech company after a failed ERP rollout that prevented proper billing of 25% of their monthly revenue and caused significant negative social media impact. I operationalized data from their recent ERP and ticketing system rollouts, acting as a forensics troubleshooter for data quality and process issues.
- Identified root cause and reduced finance team's monthly credit card failures by more than \$500K per month on \$20M of monthly invoicing. Built tactical and executive-level tracking and reporting dashboards to maintain a lower failure rate on an ongoing basis.
- Mined customer data for patterns in household spending for a Fintech startup's financial application, evaluating 40K+ households across 45M+ transactions and providing insights for developing new product features.
- Created optimization model and system for Aruban timeshare to handle weekly occupant transitions more efficiently, reducing mid-week unit swaps by more than 20%.
- Designed and built a decision support model for a global company to improve sustainable energy procurement decisions with consideration of cost, branding, and sustainability reporting. (Published in [Environment Systems and Decisions](#))

MIRAH, BOSTON, MA

2021 - Present

Provider of measurement-based care (MBC) and patient-reported outcomes for behavioral health providers and their patients.

Board Member (2022 – Present)

Chief Operating Officer (2021 – 2023)

- Orchestrated all activities for customer success and support, clinical operations, IT, compliance, human resources, financial reporting, data science, and business intelligence activities to support every customer's MBC implementation, resulting in 850% growth in monthly measured patients in 18 months.
- Spearheaded the implementation of MBC with mental health providers, reducing patient no-show rates by more than 20% while demonstrating clinically significant reductions in reported outcomes for up to 75% of our customers' patients.
- Streamlined clinical operations, IT infrastructure, data science, and business intelligence efforts, supporting business growth and optimizing business processes, ensuring compliance with HIPAA and SOC2+HITRUST regulatory standards.
- Championed standardized patient-reported outcomes, developing comprehensive reporting systems through collaborative discovery with clinical executives while ensuring consistent and valuable insights for all customers.

DONALD J. JENKINS, PH.D.

Mobile (617) 686-0649 • donald.jenkins001@gmail.com • <https://www.linkedin.com/in/jenkinsdonald>

ENEL-X NORTH AMERICA (FORMERLY ENERNOC), BOSTON, MA

2007 – 2019

Provider of Energy Intelligence Software and Services used by institutions, businesses, utilities, and grid operators.

Chief Data Scientist (2018 – 2019)

Vice President Advisory Solutions Service Delivery (2017 – 2018)

General Manager of Global Utility Bill Management, Vice President (2016 – 2017)

Vice President of Global Operations (2014 – 2016)

Senior Director of Energy Markets and Data Quality (2012 – 2014)

Early EnerNOC career includes various financial and operational leadership roles (2007 – 2012)

DATA QUALITY, DATA SCIENCE, ANALYTICS, AND INFORMATION SYSTEMS HIGHLIGHTS

- Built a Data Science team to design and create patented software solutions to monitor and streamline the daily gigabytes of incoming data on client energy usage and expenditures, paving the way for diversifying EnerNOC's revenue streams.
- Drove cross-functional initiatives to collect, validate, and analyze more than four million daily energy data points from 15,000+ real-time meters, enabling clients to save more than \$1 billion in energy costs since EnerNOC's founding.
- Championed EnerNOC's first Big Data project leveraging cloud computing parallel processing capabilities, using statistical algorithms and data mining to reduce analysts' computational time by 98% and manual data reconciliation by 90%.
- Created EnerNOC's Data Quality team to ensure demand response energy data submitted to electric grid operators met diverse financial compliance and tariff-based requirements while protecting tens of millions of dollars of revenue at risk.

OPERATIONAL AND BUSINESS LEADERSHIP HIGHLIGHTS

- Advised the CEO and Executive Team on all aspects of our data-driven approach to tackling sustainable energy solutions. Data evangelist driving best practices adoption for data governance and data-driven decision-making organization-wide.
- Transformed global technology-enabled utility bill management service, overseeing more than \$10 million of revenue with full P&L responsibility for driving revenue growth and improving bottom-line costs. Teams delivering services were located on five continents, supporting customers in 100+ countries, with 24/7/365 capability.
- Led a global operations team of 600+ employees, supporting nearly \$500M in annual revenue, providing diverse energy services worldwide while cultivating successful relationships with customers, regulators, utilities, and vendors.
- Directed portfolio management team in mapping company strategic direction and procuring more than \$1 billion in electricity capacity market auctions to meet commitments in demand response programs regionally and internationally.
- Grew the Network Operations department, aligning talent by function while scaling team performance and productivity by 10x. Planned and built six global Network Operations Centers, ensuring operational resilience and delivering the highest level of service to commercial and industrial clients.

ENERNOC LEADERSHIP AWARDS

- 2015 "Data Fellowship" Award for influencing and inspiring EnerNOC teams in all aspects of data-driven excellence.
- 2012 "Giudice Confluence of Influence" Executive Award for mentoring, developing, and inspiring staff company-wide.
- 2009 "MegaWatt" company MVP Award for exemplary leadership, operational excellence, and stellar customer service.

FORMAL EDUCATION

PH.D. DATA SCIENCE TRACK (MANAGEMENT INFORMATION SYSTEMS), UMASS BOSTON, MA

2023

Dissertation: *Application of Business Analytics Approaches to Address Climate-Change-Related Challenges*

Won the 2021 Ph.D. Award for Academic Distinction in Information Systems for Data Science

M.S. OPERATIONS RESEARCH, NAVAL POSTGRADUATE SCHOOL, MONTEREY, CA

2002

Thesis: *Evaluation of Fraud Detection Data Mining used in the Auditing Process of the Defense Finance and Accounting Service*

Won the 2002 Chief of Naval Operations Award for Excellence in Operations Research, Graduated with Distinction (top 10%)

DUAL B.S. / B.A. ELECTRICAL ENGINEERING, UNIVERSITY OF SAN DIEGO, SAN DIEGO, CA

1994

DONALD J. JENKINS, PH.D.

Mobile (617) 686-0649 • donald.jenkins001@gmail.com • <https://www.linkedin.com/in/jenkinsdonald>

U.S. NAVY AND MARINE CORPS, VARIOUS LOCATIONS

1986 – 2007

Program Manager, Royal Navy Fleet Headquarters, Portsmouth, England (2005 – 2007)

Served as primary U.S. embassy liaison for U.S. and U.K. operational and logistic stakeholders for the cruise missile program.

- Identified and proactively resolved complex system and staff issues for the \$500M missile program.
- Created the U.K.'s Strategic Concept of Operations for the newly acquired Tomahawk missile system, setting a clear ten-year vision and plan for progress within the Royal Navy and Ministry of Defence.
- Coordinated continuous training and evaluation programs across ten British submarines (200+ tactical staff), ensuring the Royal Navy Submarine Fleet maintained 100% operational readiness on cruise missile systems and operations.

Operations Officer / Department Head, USS Albany, Norfolk, VA (2002 – 2005)

Selected to plan, coordinate, implement, and execute operations for a \$2 billion nuclear submarine, including an arduous six-month, 15,000-mile Persian Gulf deployment.

- Completed numerous highly classified, real-time operational missions on time, always accomplishing the primary mission of submarine deployments while overseeing intelligence gathering and communications to higher-level command.
- Scheduled, coordinated, and administered multi-million dollar in-port construction and renovation contracts, delivering all projects on time and on budget.
- Turned around an underperforming department of 40 sailors in 15 months, boosting the team's performance from worst to best in a six-ship squadron.

Early military career includes supervisory / leadership roles in U.S. Marine Corps and U.S. Navy (1986 – 2002)

ADDITIONAL HIGHER-LEVEL EDUCATION

EXECUTIVE LEADERSHIP INSTITUTE, GREATER BOSTON CHAMBER OF COMMERCE, BOSTON, MA

Six-month-long executive leadership program hosted by MIT Sloan and Harvard Kennedy Schools.

GREEN POWER PROJECT FEASIBILITY ANALYSIS PROGRAM, WILLIS COLLEGE OF BUSINESS AND TECHNOLOGY, OTTAWA, CANADA

Qualified as analyst in conducting feasibility analysis for solar, wind, hydroelectric, and combined heat and power (CHP) projects. Completed eight projects, including one solo and one group feasibility study for each energy type.

BRITISH SUBMARINE COMMANDING OFFICERS COURSE, ROYAL NAVY SUBMARINE BASE, FASLANE, SCOTLAND, UK

Six-month-long command leadership training and evaluation for prospective submarine commanding officers. One of only eight Americans to pass the course at the time of my graduation (30% historical program failure rate).

CERTIFIED NAVAL NUCLEAR ENGINEER QUALIFICATION COURSE, GROTON, CT

Qualified as a Naval Nuclear Engineer, showcasing technical expertise, problem-solving skills, and unwavering commitment to safety and efficiency in complex engineering settings.

NAVAL NUCLEAR ENGINEERING, ORLANDO, FL, AND NAVAL NUCLEAR POWER TRAINING, BALLSTON SPA, NY

Graduate-level coursework in Math, Engineering, Chemistry, Physics, Materials, Thermodynamics, and Nuclear Operations. Placed top 10% of naval officer students in theoretical classroom and operational training on a live naval nuclear power plant.

NSF Biographical Sketch Donald J. Jenkins, Ph.D. (ORCID ID: 0000-0001-7901-0110)

Dr. Donald J. Jenkins earned his Ph.D. in the Information Systems for Data Sciences Track from the University of Boston, Massachusetts, in August 2023. In pursuit of his Ph.D., Donald developed a comprehensive data analytics skillset. His dissertation, "Application of Business Analytics for Climate-Change-Related Challenges," was a three-essay project. The first essay focused on natural language processing and evaluated climate change adaptation literature from 2000 to 2020. The second essay conducted a large-scale network optimization cost analysis, utilizing open-source datasets and geographic information sources to determine the optimal investment needed to protect East Boston from sea level rise. The final essay applied multiple decision science theories with simulation to create a decision support framework for global companies seeking strategic and sustainable energy purchases. As a nontraditional student, Donald brought a wealth of experience to his academic journey. After retiring from the United States Navy in 2007, Donald has held multiple executive and senior leadership positions in cleantech and healthtech companies. His most recent role was as Chief Operations Officer at Mirah, a behavioral health software company dedicated to supporting mental health clinics in delivering evidence-based practices through measurement-based care. In 2019, Donald founded Data Driven Decision Advisors, LLC, to assist business clients facing complex business process challenges, developing data-driven solutions to address their problems effectively. Throughout his career in industry and as a consultant, Donald supervised numerous graduate student capstone projects that revolved around solving real-world business process and analytics issues.

FORMAL EDUCATION

Charter Oak Community College	New Britain, CT	Applied Science	AS	1990
University of San Diego	San Diego, CA	Electrical Engineering	BA/BS	1994
Naval Postgraduate School	Monterey, CA	Operations Research	MS	2002
University of Massachusetts	Boston, MA	Information Systems for Data Science	Ph.D.	2023

PROFESSIONAL POSITIONS

Principal	Data Driven Decision Advisors, LLC	2019 – Present
Board Member	Mirah	2022 – Present
Chief Operating Officer	Mirah	2021 – 2023
Chief Data Scientist	Enel-X	2018 – 2019
VP Advisory Solutions Service Delivery	Enel-X	2017 – 2018
General Manager Utility Bill Management	EnerNOC	2016 – 2017
VP Global Operations	EnerNOC	2014 – 2016
Senior Director Energy Markets and Data Quality	EnerNOC	2012 – 2014
Director of Network Operations	EnerNOC	2010 – 2011
Senior Manager Dispatch Operations	EnerNOC	2008 – 2010
Network Operations Center Supervisor	EnerNOC	2007 – 2008
Submarine Officer and Naval Nuclear Engineer	United States Navy	1994 – 2007
Enlisted Marine – Aviation Operations	United States Marine Corps	1986 – 1994

PUBLICATIONS

Jenkins, D.J. (2023). Application of business analytics to address climate-change-related challenges (Ph.D. Dissertation, University of Massachusetts, Boston)

Jenkins, D. J., & Keisler, J. M. (2022). A decision analytic tool for corporate strategic sustainable energy purchases. *Environment Systems and Decisions*, 42(4), 504-520.

Jenkins, D. J. (2002). Evaluation of fraud detection data mining used in the auditing process of the Defense Finance and Accounting Service (Master's Thesis, Naval Postgraduate School, Monterey, CA)

SYNERGISTIC ACTIVITIES

Namubiru, R., Jenkins D.J., Namayanja, J.M., What are Measurement-based Care (MBC) software service providers saying in a world where MBC can transform mental healthcare?, Northeast Decision Sciences Institute, 2023 Annual Conference, Washington D.C., 30 March – 01 April 2023.

Jenkins D.J., Pajouh, F.M., Kirshen, P.H., A Generalized Stochastic Optimization Network Model for Coastal City Flood Adaptation Planning, INFORMS Annual Meeting (virtual), 08 – 13 November 2020.

Jenkins D.J., Namayanja, J.M., An Assessment of Spending Behavior for Households using Frequent Pattern Analysis. Decision Sciences Institute Annual Conference, New Orleans, Louisiana, 23 – 25 November 2019.

Jenkins D.J., Pajouh, F.M., Kirshen, P.H., Network Optimization Approach for Flood Risk Mitigation in Coastal Cities Facing Climate-Change-Induced Sea Level Rise. INFORMS Annual Meeting, Seattle, Washington, 20 – 23 October 2019

Jenkins D.J., Keisler, J.M., A Multi-attribute Utility Decision Support System for Strategic Sustainable Energy Purchases, Proceedings of The 2019 Green & Digital Cities Conference, Wroclaw, Poland, 26 – 29 June 2019.

RELATED RECOGNITION AND AWARDS

Recognized as *Leading Data Consultant for North America 2022*, Chief Data Officer Magazine, June 2022.

Received the *2021 PhD for Academic Distinction in Information Systems for Data Science Award*, University of Massachusetts, Boston, May 2021.

Received *Best Paper in Applied Theory Award*, 2019 Green & Digital Cities Conference, Wroclaw, Poland, 26-29 June 2019.

Received the *2002 Chief of Naval Operations Award for Excellence in Operations Research*, Naval Postgraduate School, Monterey, CA. June 2002.

Interview report:

Alkis and I just finished our interview with Don Jenkins. Our overall assessment is that he would make a great adjunct for teaching BIA 610 with Web Campus/Noodle courses. He has a significant amount of experience but really doesn't have actual teaching experience. I think he would be fine, but I would have him teach one section of the course, to make sure he is comfortable with an online format. - Christopher Asakiewicz

He can also teach BIA 500 if needed. - Alkis

7 North Xing, Bridgewater, New Jersey * (908) 268-8773 * skoshal372@gmail.com

CAREER OBJECTIVE

SENIOR DATA SCIENTIST & GLOBAL BUSINESS EXECUTIVE

Thought leader and innovator in the use of advanced data and analytics technology that mobilizes transformational business and IT alignment, enabling growth through enhanced customer engagement, increased revenues, and improved market share presence.

CORE COMPETENCIES

- ♦ Commercial System & CRM
- ♦ Machine Learning & Data Engineering
- ♦ Master Data Management
- ♦ Data Strategy and Governance
- ♦ Business Intelligence and Visualization
- ♦ Field Force Analytics Optimization
- ♦ Product Launch Insights Support
- ♦ Sales and Marketing, RWE Data Assets
- ♦ Strategy and Roadmap assessments
- ♦ Technology Applications & Platforms

PROFESSIONAL EXPERIENCE

JOHNSON & JOHNSON, TITUSVILLE, NJ

COMMERCIAL EXCELLENCE (CE) - JANSSEN

Director, Data Ops and Engineering, August 2019 - present

SCOPE: Manage a team of 9 Machine Learning & Data Engineers + 80 consultants and \$10 million budget

Developed, shaped and deployed Janssen's U.S sales and marketing data ecosystem partnering with advanced analytics, data sciences (JJIT) and external partners enabling business to launch Omnichannel JATL initiative and realize the StaT Strategy.

- ♦ **Omnichannel Launch:** Selected to be part of \$40 M U.S. based Omnichannel JALT initiative. Developed the machine learning & data engineering strategy for driving the sales initiatives across all therapeutic areas of the pharmaceutical business. Built a team of 8+ data engineers from the ground up to build, deploy and support data engineering pipeline for US \$20 Billion entity. Worked closely with our Machine Learning Engineers to design and create pipelines processing RWE (Claims), Sales and Marketing data. Created a machine learning operations (MLOps) managed services program working with Commercial partners - Deloitte and Atria. Delivered a flexible and scalable cloud platform with 5000+ features that deliver insights on specialized targeting of HCP universe.
- ♦ **Commercial Data Platform (CDP) Transformations:** CDP is the data warehouse and data mart ecosystem delivering key sales metrics and operational data to CRM and analytic systems. Managed day-to-day sales data processing and improving the system by creating operational metrics dashboard and continually improving the delivery for key stakeholders - Integrated Analytics, Sales Force and Incentive Compensation. Built up both internal and external capabilities - hiring internal team and improving partner skill sets. Grown CDP from 100 to 150 data sources over 2 years while keeping run cost to net zero year-on-year.
- ♦ **Marketing Data Platform (MDP) Creation:** Created a marketing data platform from scratch to support the needs of marketing brands and get ready for Omnichannel initiative. Worked with marketing agencies such as CMI and J3 to ensure data accuracy and timely delivery. Overhauled the data processing architecture of marketing data flow using data engineering techniques and economies of scale. MDP fuels Omnichannel initiative by supply marketing tactics for machine learning algorithms. For Marketing Mix Models MDP assists in measuring HCP responsiveness to channel/tactic to priority targets (HCP's) for Non-Personal Promotion.
- ♦ **Talent Acquisition and Enablement:** Executed Commercial Excellence Summer Internship program, working with CE leaders, building a case for hiring "young" talent with a focus on Diversity Equity & Inclusion. Leveraged my advisory board position at Stevens Institute of Technology to start an internship program at Janssen. Got approval for getting talented students hired within the CE organization in Data Engineering and Integrated Analytics group.

SANOFI, BRIDGEWATER, NJ

CHIEF DATA OFFICE (CDO) UNIT

Senior Director, Global Business Intelligence & Analytics Lead, Jan 2015 - July 2019

SCOPE: Managed a team of 20 employees + 80 consultants and \$30 million budget

Joined leadership team with charter to lead transformation and modernization of organization's CRM and MDM systems, including advanced analytics, serving as a foundation to propel realization of product launches and acquisition strategies.

- ♦ **CRM and MDM Transformations:** Oversaw the strategy and execution of North America DCV & Genzyme business from IQVIA's iEI to VEEVA and internal MDM to Reltio over a span of 18 months. Built a team from ground up to lead this transformation. Key business outcomes resulted in accurate and timely Health Care Account and Affiliation master data delivery providing optimized promotional investment decisions, enhanced targeting and resource deployment. Enhanced data accuracy for compliance and transparency.
- ♦ **Patient Collect Data Insights:** Partnered with Rare Disease Commercial business to deploy a Global end to end Patient aggregation transformational transactional data insights web based solution on the cloud. Key business outcomes included a \$5 Million increase in yearly revenue via data collection savings and a 30% improvement in operational efficiency.
- ♦ **Product Launch and Technology Transformations:** Executed the launch of key products such as Praluent, Sarilumab and Dupilumab via migration and modernization of commercial IT systems (Advanced Analytics Platforms for Field Force) to cloud-based platforms and business intelligence tools supporting three business units (Global, DCV, Genzyme). Leveraged Amazon Web Services to reduce development time by 20% and annual infrastructure cost by 15%.
- ♦ **Data warehouse & BI Solutions:** Defined a Global BI/DW technology modernization roadmap and new analytics portfolio. Consolidated Multi-Sclerosis, Cardio Vascular (including Specialty Pharmacy) data warehouses into new enterprise data warehouse built on cloud solutions. Transitioned field force sales teams and business analysts to self-service reporting and agile predictive analytics delivery model. Key outcomes include improved speed to business insight via streamlined executive and operational reporting and \$500 K annual saving in professional and support costs.
- ♦ **Consolidation of BI Applications:** Decommissioned 100+ business intelligence applications across Global landscape by closely partnering with key stakeholders by moving them to more cloud based innovative solutions. Key business outcomes include increased business insights and cost savings of \$1.5 M annually.

COMPUTER SCIENCE CORP (CSC), NEW YORK, NY

BIG DATA AND ANALYTICS DIVISION

Practice Partner, Global Big Data and Analytics, Sep 2012- Dec 2014

SCOPE: Managed a team of 15 employees + 40 consultants and \$10 million budget

Part of CSC's Global Big Data & Analytics leadership team as a change manager, rebuilding and transforming CSC's data and analytics service offerings to improve value proposition and empower corporate growth. Spearheaded Pfizer's data and analytics transformation, using CSC's agile BI delivery concepts for their commercial and human resources functions.

- ♦ **Strategic Digital Analytics:** Launched the Multi-Channel Engagement solutions supporting consumer marketing campaign effectiveness and brand market growth initiatives. Key outcomes resulted in improved brand formulations, enabled discovery of untapped market demand, and facilitated an increase in key brand business sales of 20% within the first 6 months of go live.
- ♦ **Resource Allocation Optimization:** Delivered new human resource business processes and analytic solutions to align with Pfizer's strategy of consolidating to three business units. Key business outcomes included an enhanced insight into workforce counts across the Globe for the new business units and ROI payback period of 1 year via workforce consolidation.
- ♦ **Analytics Roadmap Payroll Solutions:** Developed an analytics strategy for one of the largest providers of business processing and cloud based solutions including human resources, payroll and benefits. Key business

outcomes included a clearly defined three-year plan for data strategy, governance, analytics and infrastructure upgrades for client.

NEC CORPORATION OF AMERICA, PRINCETON, NJ
BUSINESS INTELLIGENCE AND ANALYTICS DIVISION
Director, Solutions Development, Jul 2008- Aug 2012

SCOPE: Managed a team of 10 employees + 40 consultants and full P&L responsibility for \$7 million project portfolio

Worked with business stakeholders and senior leadership role to create future vision in the area of advanced analytics, big data strategy and business intelligence center of excellence organizations. Defined analytics roadmap for clients including business and technology. Spearheaded migration of silo business units reporting solutions to corporate wide partner based data analytic models.

- ♦ **Business and IT Transformation of Analytic Solutions:** Engagement Manager for planning, migration and estimation at Bausch & Lomb for standardization of CRM and business intelligence applications, training of sales team to operationalize their systems. Key business outcomes resulted in a self-service reporting and guided analytics, reducing IT related report development demands by 80% and data delivery at 30% faster rates saving the company \$1.5 million annually.
- ♦ **Financial Process Consolidation and Optimization:** Evaluated the existing business intelligence solution at a Non-Government Organization for their human resources and finance processes creating a self-service, ad-hoc solution for advanced reporting and analysis using in-memory OLAP technologies and reporting via IBM Cognos. Key business outcomes included a reduction in the financial reporting process on a monthly basis by 7 days and visibility to cost overage of \$1 Million.
- ♦ **Data Warehousing Buildout:** Worked with business and technology teams at a major manufacturing client to build a Data Warehousing solution from the ground up, establish supporting teams (onshore and offshore) for the analytics solution deployed. This enabled the client to view profitability growth, financial closing processes and sales & marketing data.
- ♦ **Master Data Management & Governance:** Establish a consistent and sustainable process for an automotive client integrating data sources across enterprise business segments for data assets utilizing best practices of master data processing, data cataloging and data governance.

EARLIER CAREER HIGHLIGHTS

CITIGROUP, NEW YORK, NY (2005-2008)

Formulation and development of business plan and rollout strategy for trade reporting platforms. Worked with trading desk and global teams to complete functional specification documents, testing and rollout of Direct Market Access trading functionality for P&L reporting. Correspond with external customers to outline interface requirements for Equities Trading Algorithms between traders and external customers such as Fidelity and Bloomberg.

CREDIT SUISSE, NEW YORK, NY (2003-2005)

Manage full range of program management lifecycle activities with an emphasis in project planning, risk assessment, resource management, estimating & monitoring costs, quality management, & project contract management reporting to the Director of Equities. Interfaced with traders on day to day basis for cash equities trading support services. Coordinated technical responses for support of trading platforms connected to Listed Exchanges and ECNs such as NASDAQ, NYSE, BRUT and ARCA.

PRIOR EMPLOYERS - LUCENT TECHNOLOGIES, TELCORDIA

EDUCATION

RUTGERS UNIVERSITY, NEW BRUNSWICK, NJ
Executive MBA (Marketing and Finance), May 2008

OHIO UNIVERSITY, ATHENS, OH
Masters - Electrical & Computer Science, Oct 1994

ADVISORY BOARD, BUSINESS INTELLIGENCE & ANALYTICS , STEVENS INSTITUTE OF TECHNOLOGY
October 2019 - Current

ADJUNCT PROFESSOR, BUSINESS INTELLIGENCE & ANALYTICS , STEVENS INSTITUTE OF TECHNOLOGY
Fall-2023

ADDITIONAL CERTIFICATION & SKILLS

- ♦ **Becoming an AI-First Product Leader, Linked In Learnings**
- ♦ **Becoming a Product Manager: A Complete Guide, Linked In Learnings**
- ♦ **Digital Marketing Professional Certificate, Wharton**
- ♦ **Machine Learning Engineering Nano-degree Udacity**
- ♦ **Data Engineering Nano-degree Udacity**
- ♦ **Core Designer Dataiku Certification**
- ♦ **Data Assets: IQVIA - LAAD, DDD, Exponent, HCOS, SHS - Claims, Prometrics, Komodo, RWE - EMR, Marketing (CMI, J3, Speaker Program), MMIT**
- ♦ **Core Technology Foundations: Machine Learning, Amazon Web Services, Cloudera Hadoop, Informatica, Python, Dataiku, Business Objects, Cognos, MicroStrategy, SAS, QlikView/QlikSense, Tableau, DBMS Platforms (Redshift, Teradata, Oracle, SQL Server)**

Theodoros Lappas, Assistant Professor**tlappas@stevens.edu**

CONTACT

DETAILS

Theodoros Lappas
 Assistant Professor
 School of Business
 Stevens Institute of Technology
 1 Castle Point Terrace
 Hoboken, NJ 07030
 tlappas@stevens.edu

INTERESTS

Reputation Systems, Social Networks, Data Mining, Machine Learning

EDUCATION

Ph.D., Computer Science **2006-2011**
 University of California, Riverside, CA
 Area of Study: Data Mining & Social Media
 Advisors: Prof. Dimitrios Gunopulos, Prof. Vassilis Tsotras
 Dissertation Title: *Algorithmic Challenges in Social Media Search.*

Undergraduate Degree, Computer Science **2001-2005**
 Athens University of Economics & Business, Department of Informatics
 Specialization: Data Mining & Information Systems

AWARDS AND
RECOGNITION

Outstanding Reviewer & Member of the Program Committee **SIGKDD 2012**

Research Fellowship **2011 - 2013**
 Rafik B. Hariri Institute for Computing and Computational
 Science & Eng

Scholarship for exceptional performance in studies **2009 - 2011**
 Bakala Foundation

Dean's Distinguished Fellowship Award **2006 - 2008**
 University of California, Riverside

Outstanding Academic Performance Scholarship **2007**
 Gerondelis Foundation Scholarship

Citation Count: 1404

h-index: 15

JOURNAL

PUBLICATIONS

Behzad Golshan, Sanaz Bahargam, Theodoros Lappas, Evimaria Terzi
A Team Formation Model for Faultline Minimization.
 Expert Systems With Applications (**ABS3**; IF: 3.928)

A. Nelakurthi, A. Pinto, C. Cook, L. Jones, M. Boyle, J. Ye, T. Lappas, and J. He
*Should Patients with Diabetes Be Encouraged to Integrate Social Media into Their Care
 Plan?*

Future Science OA

Di Zhu, Theodoros Lappas, and Juheng Zhang.
Unsupervised tip-mining from customer reviews.
Decision Support Systems 107 (2018), p. 116-124. (ABS3; IF: 3.222)

Serhan Kotiloglou, Theodoros Lappas, Konstantinos Pelechrinis, Panagiotis Repoussis.
The Multi-Period Tourist Trip Design Problem with Time Windows.
Tourism Management 62 (2017), p. 76-88. (ABS4; IF: 3.140)

Konstantinos Pelechrinis, Christos Zacharias, Marios Kokkodis, Theodoros Lappas.
*Economic impact and policy implications from urban shared transportation:
The case of Pittsburgh's shared bike system.*
PloS one 12, no. 8 (2017), e0184092 (IF: 2.806)

George Valkanas, Theodoros Lappas, and Dimitrios Gunopulos.
Mining Competitors from Large Unstructured Datasets.
IEEE Transactions on Knowledge and Data Engineering 29, no. 9 (2017), p. 1971-1984.
(IF: 2.77)

Apostolos Filippas and Theodoros Lappas.
Strength in Numbers: Using Big Data to Simplify Sentiment Classification.
Big data 5, no. 3 (2017), p. 256-271. (IF: 1.489)

Ke Zhang, Konstantinos Pelechrinis, and Theodoros Lappas.
Effects of Promotions on Location-Based Social Media: Evidence from Foursquare.
International Journal of Electronic Commerce 22, no. 1 (2018), p. 36-65.
(ABS3; IF: 1.872)

Theodoros Lappas, Gaurav Sabnis, and Georgios Valkanas.
*The impact of fake reviews on online visibility:
A vulnerability assessment of the hotel industry.*
Information Systems Research 27, no. 4 (2016), p. 940-961. (FT 45; IF: 2.436)
• **Runner-up for Best ISR Paper, 2016**
• **Selected for the *Inform's Journal Highlights* section**

Dimitrios Kotzias, Theodoros Lappas, and Dimitrios Gunopulos.
*Home is where your friends are:
Utilizing the social graph to locate twitter users in a city.*
Information Systems 57 (2016), p. 77-87. (IF: 2.777)

Pei Yang, Hongxia Yang, Haoda Fu, Dawei Zhou, Jieping Ye,
Theodoros Lappas, Jingrui He.
"Jointly modeling label and feature heterogeneity in medical informatics."
ACM Transactions on Knowledge Discovery from Data 10, no. 4 (2016), p. 31:1-31:25
(IF: 1.489)

JOURNAL
ARTICLES
UNDER REVIEW
AND REVISION

Yue Han, Gaurav Sabnis, Theodoros Lappas
The Importance of Interactions between Content Characteristics and Creator Characteristics for Studying Virality in Social Media.
Conditional Accept in *Information Systems Research*. (FT45; IF: 2.436)
Submitted Oct 3, 2017. First revision submitted Oct 31, 2018. Final submission currently under review.

Theodoros Lappas, Marios Kokkodis, Kostantinos Pelechrinis
My City is Better Than Yours: Image-Difference Bias in Online Reputation Platforms.
Third and final round in *Information Systems Research*. (FT45; IF: 2.436)
The Senior and Associate Editor were pleased with our revision and gave a us a short list of final points to address. They have informed us that they will make the final decision without sending the manuscript back to the reviewers.
Submitted Aug 28, 2017. First revision submitted Aug 3, 2018. Currently under review.

Marios Kokkodis, Theodoros Lappas, Sam Ransbotham
From Lurkers to Contributors:
Modeling and Encouraging User Involvement in Online Communities.
Third round in *Information Systems Research*. (FT45; IF: 2.436)
Submitted Mar 3, 2018. First revision submitted Jan 14, 2019. Currently under review.

Marios Kokkodis, Theodoros Lappas and Gerald Kane
Purchase Verification and Fake Reviews in E-commerce Platforms: Evidence from a Natural Experiment
Second round in *Information Systems Research*. (FT45; IF: 2.436)
Submitted Oct 16, 2018. Currently working on the first revision.

Yahui Sun, Theodoros Lappas, Saman Halgamuge *The prize-collecting approach to finding a team of experts in social networks*
Second round in *IEEE Transactions on Knowledge and Data Engineering*. (IF: 2.77)
Submitted Jun 4, 2018. Currently working on the first revision.

Theodoros Lappas
Mining Career Paths from Large Resume Databases: Evidence from IT Professionals.
Under review in *ACM Transactions on Knowledge Discovery in Data*. (IF: 1.489)
Submitted Feb 14, 2019.

JOURNAL
ARTICLES IN
PREPARATION

Theodoros Lappas, Chrysanthos Dellarocas
Reputation and Contribution in Online Question-Answering Communities.
In Preparation for *Information Systems Research*. (FT45; IF: 2.436)

Sanaz Bahargam and Theodoros Lappas
Profiling the Different Types of Data Scientists: Which One is Right for You?
In Preparation for *Management Information Systems Quarterly*. (FT45; IF: 5.311)

Di Zhu, Theodoros Lappas and Chrysanthos Dellarocas
Who Should I Trust? Measuring and Explaining Rating Discrepancies Between the Peanut Gallery and Professional Movie Critics
In Preparation for *Information Systems Research*. (FT45; IF: 2.436)

Sanaz Bahargam, Theodoros Lappas, Evimaria Terzi
The Guided Team-Partitioning Problem: Definition, Complexity, and Algorithms.
In Preparation for *IEEE Transactions on Knowledge and Data Engineering*, 2015. (IF: 2.77)

BOOK
CHAPTERS

Theodoros Lappas, Kun Liu and Evimaria Terzi
A Survey of Algorithms and Systems for Expert Location in Social Networks
Social Network Data Analytics, p. 215-242, 201

REFEREED
CONFERENCE
PROCEEDINGS

Golshan, Behzad, Theodoros Lappas, and Evimaria Terzi. "Profit-maximizing cluster

hires.” In Proceedings of the 20th ACM SIGKDD international conference on Knowledge discovery and data mining, pp. 1196-1205. ACM, 2014.

Zhang, Yaonan, Theodoros Lappas, Mark Crovella, and Eric D. Kolaczyk. “*Online ratings: Convergence towards a positive perspective?*.” In Acoustics, Speech and Signal Processing (ICASSP), 2014 IEEE International Conference on, pp. 4788-4792. IEEE, 2014.

Kotsakos, Dimitrios, Theodoros Lappas, Dimitrios Kotzias, Dimitrios Gunopulos, Nattiya Kanhabua, and Kjetil Nørnvåg. “*A burstiness-aware approach for document dating.*” In Proceedings of the 37th international ACM SIGIR conference on Research & development in information retrieval, pp. 1003-1006. ACM, 2014.

Gionis, Aristides, Theodoros Lappas, Konstantinos Pelechris, and Evimaria Terzi. “*Customized tour recommendations in urban areas.*” In Proceedings of the 7th ACM international conference on Web search and data mining, pp. 313-322. ACM, 2014.

Lappas, Theodoros, Marcos R. Vieira, Dimitrios Gunopulos, and Vassilis J. Tsotras. “*STEM: A spatio-temporal miner for bursty activity.*” In Proceedings of the 2013 ACM SIGMOD International Conference on Management of Data, pp. 1021-1024. ACM, 2013.

Lappas, T., Vieira, M.R., Gunopulos, D. and Tsotras, V.J., 2012. On the spatiotemporal burstiness of terms. Proceedings of the VLDB Endowment, 5(9), pp.836-847.

Lappas, Theodoros. “*Fake reviews: The malicious perspective.*” In International Conference on Application of Natural Language to Information Systems, pp. 23-34. Springer Berlin Heidelberg, 2012.

Lappas, Theodoros, Mark Crovella, and Evimaria Terzi. “*Selecting a characteristic set of reviews.*” In Proceedings of the 18th ACM SIGKDD international conference on Knowledge discovery and data mining, pp. 832-840. ACM, 2012.

Lappas, Theodoros, George Valkanas, and Dimitrios Gunopulos. “*Efficient and domain-invariant competitor mining.*” In Proceedings of the 18th ACM SIGKDD international conference on Knowledge discovery and data mining, pp. 408-416. ACM, 2012.

Gionis, Aristides, Theodoros Lappas, and Evimaria Terzi. “*Estimating entity importance via counting set covers.*” In Proceedings of the 18th ACM SIGKDD international conference on Knowledge discovery and data mining, pp. 687-695. ACM, 2012.

Lappas, Theodoros, and Evimaria Terzi. “*Daily-deal selection for revenue maximization.*” In Proceedings of the 21st ACM international conference on Information and knowledge management, pp. 565-574. ACM, 2012.

Golshan, Behzad, Theodoros Lappas, and Evimaria Terzi. “*Sofia search: a tool for automating related-work search.*” In Proceedings of the 2012 ACM SIGMOD International Conference on Management of Data, pp. 621-624. ACM, 2012.

Lappas, Theodoros, and Michail Vlachos. “*Customizing search results for non-native speakers.*” In Proceedings of the 21st ACM international conference on Information and knowledge management, pp. 1829-1833. ACM, 2012.

Lappas, Theodoros, Kunal Punera, and Tamas Sarlos. “*Mining tags using social endorsement networks.*” In Proceedings of the 34th international ACM SIGIR conference on Research and development in Information Retrieval, pp. 195-204. ACM, 2011.

Lappas, Theodoros, and Evimaria Terzi. “*Toward a fair review-management system.*” In Joint European Conference on Machine Learning and Knowledge Discovery in Databases, pp. 293-309. Springer Berlin Heidelberg, 2011.

Lappas, Theodoros, Evimaria Terzi, Dimitrios Gunopulos, and Heikki Mannila. "Finding effectors in social networks." In Proceedings of the 16th ACM SIGKDD international conference on Knowledge discovery and data mining, pp. 1059-1068. ACM, 2010.

Lappas, Theodoros, and Dimitrios Gunopulos. "Interactive recommendations in social endorsement networks." In Proceedings of the fourth ACM conference on Recommender systems, pp. 127-134. ACM, 2010.

Lappas, Theodoros, and Dimitrios Gunopulos. "Efficient confident search in large review corpora." In Joint European Conference on Machine Learning and Knowledge Discovery in Databases, pp. 195-210. Springer Berlin Heidelberg, 2010.

Lappas, Theodoros, Benjamin Arai, Manolis Platakis, Dimitrios Kotsakos, and Dimitrios Gunopulos. "On burstiness-aware search for document sequences." In Proceedings of the 15th ACM SIGKDD international conference on Knowledge discovery and data mining, pp. 477-486. ACM, 2009.

Lappas, Theodoros, Kun Liu, and Evimaria Terzi. "Finding a team of experts in social networks." In Proceedings of the 15th ACM SIGKDD international conference on Knowledge discovery and data mining, pp. 467-476. ACM, 2009.

PATENTS

Theodoros Lappas, Kunal Punera, Tamas Sarlos
System and method for mining tags using social endorsement networks.
US8666927, Publication Date: Mar 4, 2014

GRANTS

Data Storytelling: Generating Informative Reports from Heterogeneous Data Sources
Funding Organization: Jefferies Group LLC
Amount: \$100,000 per year for 3 years, to fully support 1 PhD student.
The agreement also includes summer internships for the student for each of the 3 years.
Press Release: <https://www.stevens.edu/news/business-jefferies-phd-fellows-18>

Deep-Art Underwriting
Funding Organization: JP Morgan Chase (JPMC)
Amount: \$20,000, to be used for equipment and course release.
JPMC has agreed to fund the project by joining SAIL and paying the membership fee.
If approved, the second phase of the project will include additional funds for Sponsored Research.

PAST GRANT PROPOSALS (REJECTED)

CAREER: Spatiotemporal Models for Survival Analysis (2018)
Program: NSF, CAREER (Under Review)
Amount: \$535,316

Unraveling the persuasive power of user messages in Open Online Communications (2016)
Program: NSF-SMALL (Co-PI)
Amount: \$101,619

A holistic framework for team engineering (2016)
Program: NSF, III-Medium (Co-PI)
Amount: \$350,000

On the Formation of Talented and Cohesive Teams (2015)

Program: NSF, CAREER (PI)
Amount: \$518,368

Using Dedicated Social Networks to Predict Diabetes Clinical Markers (2014, revised and resubmitted in 2015)

Program: NSF, SCH-INT (Co-PI)
Amount: \$509,697

Personalizing Education: The Stevens Digital Learning Cluster (2014)

Program: NSF, II-NEW (PI)
Amount: \$611,851

PROFESSIONAL SERVICE

Service to the Institute:

- Academic Planning and Resources (APAR) Committee

Service to the School of Business:

- Strategic Planning Committee (2016-2018)
- Stevens Alliance for Innovation and Leadership Committee (2016-2018)
- Business Intelligence and Analytics Academic Committee (2013-2018)
- Information Systems Faculty Search Committee (2015-2018)

Invited Chair for the *Text Analytics* Session
INFORMS Annual Meeting, Phoenix, 2018

Invited Chair for the *Social Media Analytics* Session
INFORMS Annual Meeting, Houston, 2017

7-time NSF Panelist for CISE/III/IIS.

Small/Medium annual panels, every year during the 2012-2018 period (Arlington, VA).

Conference Committee Member: ACM SIGKDD Conference on Knowledge Discovery and Data Mining (KDD), The Web Conference (WWW), ACM International Conference on Web Search and Data Mining (WSDM), AAAI Conference on Artificial Intelligence (AAAI), ACM International Conference on Information and Knowledge Management (CIKM), IEEE International Conference on Data Science and Advanced Analytics (DSAA)

Journal Reviewer: Management Science, ACM Transactions on Knowledge Discovery from Data (TKDD), IEEE Transactions on Knowledge and Data Engineering (TKDE), Knowledge and Information Systems (KAIS), IEEE Transactions on Parallel and Distributed Systems (TPDS), Computer Vision and Image Understanding (CVIU), Journal of Combinatorial Optimization, Informatics Journal of Computing (JOC)

COURSES TAUGHT

BIA 660A Web Analytics (Fall 2017, Graduate)
Evaluation: 3.53/4 (35 enrolled)

BIA 660B Web Analytics (Fall 2017, Graduate)
Evaluation: 3.84/4 (35 enrolled)

BIA 660WS Web Analytics (Fall 2017, Graduate, Online)
Evaluation: 3.5/4 (40 enrolled)

BIA 660A Web Analytics (Spring 2017, Graduate)
Evaluation: 3.9/4 (35 enrolled)

BIA 660B Web Analytics (Spring 2017, Graduate)
Evaluation: 3.81/4 (38 enrolled)

BIA 660VZ Web Analytics (Spring 2017, Graduate)
Corporate (Verizon)
Evaluation: 3.38/4 (17 enrolled)

BIA 660A Web Analytics (Fall 2016, Graduate)
Evaluation: 3.82/4 (34 enrolled)

BIA 660B Web Analytics (Fall 2016, Graduate)
Evaluation: 3.8/4 (35 enrolled)

BIA 660C Web Analytics (Fall 2016, Graduate)
Evaluation: 4/4 (10 enrolled)

BIA 660WS Web Analytics (Fall 2016, Graduate, Online)
Evaluation: 3.32/4 (23 enrolled)

BIA 660A Web Analytics (Spring 2016, Graduate)
Evaluation: 3.76/4 (35 enrolled)

BIA 660PF Web Analytics (Spring 2016, Graduate)
Corporate (Pfizer)
Evaluation: 3.5/4 (17 enrolled)

BIA 660A Web Analytics (Fall 2015, Graduate)
Evaluation: 3.79/4 (34 enrolled)

BIA 660B Web Analytics (Fall 2015, Graduate)
Evaluation: 3.9/4 (33 enrolled)

BIA 660A Web Analytics (Spring 2015, Graduate)
Evaluation: 3.77/4 (36 enrolled)

BIA 660WS Web Analytics (Spring 2015, Graduate, Online)
Evaluation: 3.5/4 (26 enrolled)

BT 333A Relational Databases for IT (Spring 2015, Undergraduate)
Evaluation: 3.56/4 (21 enrolled)

BIA 660A: Web Analytics (Fall 2014, Graduate)
Evaluation: 3.62/4 (31 enrolled)

BIA 660B: Web Analytics (Fall 2014, Graduate)
Evaluation: 3.87/4 (31 enrolled)

BIA 660A Web Analytics (Spring 2014, Graduate)

Evaluation: 3.32/4 (28 enrolled)

BIA 660WS Web Analytics (Spring 2014, Graduate, Online)
Evaluation: 3.75/4 (7 enrolled)

MIS 630A Data & Knowledge Management (Spring 2014, Graduate)
Evaluation: 3.53/4 (40 enrolled)

MIS 630WS: Data & Knowledge Management (Fall 2013, Graduate, Online)
Evaluation: 2.68/4 (17 enrolled)

MIS 630A: Data & Knowledge Management (Fall 2013, Graduate)
Evaluation: 3.6/4 (32 enrolled)

INVITED TALKS

Reputation and Contribution in Online Question-Answering Communities.
Winter Conference on Business Intelligence, Utah, 2017

Who Should I Trust? Measuring and Explaining Rating Discrepancies Between the Peanut Gallery and Professional Movie Critics.
Winter Conference on Business Intelligence, Utah, 2017

Strength in Numbers: Can Big Data eliminate the need for complex opinion-mining algorithms?
Drexel University, 2017

Challenging The Spatial Homogeneity Of Online Reviews
INFORMS Annual Meeting, Nashville, 2016

Tracking The Evolution Of User Interests In Online Communities
INFORMS Annual Meeting, Nashville, 2016

Strength in Numbers: Can Big Data eliminate the need for complex opinion-mining algorithms?
INFORMS Annual Meeting, Philadelphia, 2015

Analyzing and Modeling Special Offer Campaigns in Location-based Social Networks
University of Pittsburgh, 2015

The Impact of Fake Reviews on Online Visibility: A Vulnerability Assessment of the Hotel Industry?
Boston College, 2015

The impact of formal education on career outcomes
Winter Conference on Business Intelligence, Utah, 2015

Strength in Numbers: Can Big Data eliminate the need for complex opinion-mining algorithms?
INFORMS Annual Meeting, Philadelphia, 2015

Customized Tour Recommendations in Urban Areas
The 7th ACM WSDM Conference, NYC, 2014

WORK EXPERIENCE

**School of Business,
Stevens Institute of Technology - Assistant Professor Sept. 2013 - Present**

Data Management Lab, Boston University - Full-Time Researcher Sept. 2011 - Aug. 2013

(Fellow at the Rafik B. Hariri Institute for Computing and Computational Science & Engineering.)

Design and implementation of a Review Management System. The platform supports review scraping from online sources, preprocessing (based on both NLP and machine learning methods), opinion and attribute extraction, summarization and ranking of reviews, quality evaluation & spam detection, and reviewer motivation. (Java, Python).

Data Management Lab, Boston University - Visiting Researcher 2010 - 2011

Design and implementation of a web-scraping engine for different types of data, including customer reviews, webpages, blogs, news articles, recipes, user comments, location-based networks and social graphs. The engine includes a pipeline for preprocessing and storing the collected information. (Java, Python, Tor).

Yahoo! Research, Data Mining and Algorithms Group - Intern Summer of 2010

Design and implementation of a machine-learning library for assigning tags to entities in social networks (e.g. pictures, users). Assignment is based on modeling the endorsement networks found in social platforms.

IBM Zurich Research Laboratory - Analytics Group January - May 2010

- *Project 1:* Implementation of a machine-learning toolkit for analytics on product sales. The project included experimentation on real data (purchase information on IBM products and clients) with different classification schemes, such as decision trees and rule-based classifiers, support vector machines and Bayesian methods (Java).

- *Project 2:* Design and implementation of a comprehensibility-aware search engine for foreign-document retrieval. Given a large corpus of documents, NLP methods are used to evaluate the anticipated comprehensibility of each document for the interested user, based on the latter's personal language skills (e.g. a German document for a user proficient in English). Documents are then evaluated based on both their comprehensibility and their relevance to the user's query. (Java, Python).

IBM Almaden Research Center, Data Mining Group - Intern June - September 2008

- *Project 1:* Design and Implementation of an algorithmic library for expert-finding and team formation in social networks. The output is a team of entities that can collectively cover the skills required for a given task, while minimizing the intra-team communication cost. (Java, Python)

- *Project 2:* A machine-learning toolkit for topical segmentation of documents. In the training phase, a set of topic distributions is learned from a given text corpus. An online algorithm is then used to identify and highlight cohesive topical segments in unseen documents (Java, Python).

Yahoo!, Content Match Group - Intern Summer of 2007

Implementation of a machine-learning library for multi-label classification of websites for Ad-matching. Includes a complete engine for preprocessing and tokenizing large text corpora. Supported classification methods include parametric mixture models, support vector machines, decision trees, Bayesian classifiers, and ensemble methods. (C++).

Database Lab, University of California, Riverside - Researcher 2006-2011

Research toward PhD Degree.

Dissertation Title: *Algorithmic Challenges in Social Media Search.*

My thesis tackles different search problems, as they emerge in real social platforms. The focus is on textual corpora (documents streams and collections, opinion-rich content, multi-

lingual text) and graph structures (social networks, citation and co-authorship graphs, endorsement networks). It includes 7 published papers (SIGKDD(3), VLDB, RECSYS, CIKM, PKDD) - see *Publications* Section.

University of California, Riverside - Teaching Assistant **2006-2010**
Courses: Data Mining, Artificial Intelligence, Software Engineering, Computer Programming, Computational Geometry (Labs, Grading, Lectures).

University of California, Riverside - Data Analyst **2008 - 2010**
Student-performance analytics toward the ABET accreditation of UCR's Computer Science Program. Data gathering and standardization, statistical analysis of performance data (correlation analysis, outlier detection), recommendations toward performance improvement.

Ministry of Economics (Greece) - Software Developer **2005 - 2006**
Design and implementation of the parsing engine of the national e-gov website for tax returns (Java). A rule-based system verifies the validity of the submitted documents and suggests appropriate corrections.

Database Lab, Athens Univ. of Economics & Business - Researcher **2004 - 2005**
Implementation of a Java library for text parsing and tokenization. Supported features include stemming, stopword removal, approximate string matching and n-gram extraction.

Malkogianni-Moutsou Foreign Language Institute - English Tutor **2004 - 2005**

Binary Logic Ltd - Software Developer **2001 - 2003**
Development of Teaching Software for foreign-language learning (Visual Basic, performance analytics).

TECHNICAL
SKILLS

Java, C, C++, Python, R, Matlab, PHP, HTML, Apache Tomcat, Apache Hadoop, MongoDB, SQL

LANGUAGES

Greek (Native), English (Fluent), German (Grundstufe Level)

YUE LENG

Phone: +1 646-504-6266 Email: yleng2@stevens.edu

EDUCATION

Stevens Institute of Technology, School of Business

Hoboken, NJ

Ph.D. in Business Administration

Sep, 2018 - Present

- **GPA: 3.9/4.0**

Tulane University, A.B. Freeman School of Business

New Orleans, LA

Master of Finance

Jun, 2015 - May, 2016

- **GPA: 3.6/4.0; Dean's List 2016**

Shanghai University, School of Economics

Shanghai, China

Bachelor of Economics in Finance

Aug, 2011 - May 2015

- **GPA: 3.7/4.0; Academic Scholarship**

PROJECT & RESEARCH EXPERIENCE

Darwin Fenner Student Managed Fund

New Orleans, LA

Portfolio Analyst

Jan, 2016 - May, 2016

- Managed \$1 million of Tulane's Endowment Fund with 26 selected students.
- Analyzed and evaluated stocks in the S&P 600 Banking and Financial Service Sector
- Designed a stock-screening model to construct a portfolio with annual return of 3.8% and downside beta of 0.9
- Led team to rank top 3 in the TIPS 2016 - Student Portfolio Managers Competition

Freeman Reports

New Orleans, LA

Equity Research Analyst

Jan, 2016 - May, 2016

- Covered Newfield Exploration Company and developed a sell-side analyst report to support investment thesis
- Forecasted profit and cost with sensitivity analysis with Excel Modeling
- Conducted a detailed research on Oil Exploration and Production Industry

Shanghai University

Shanghai, China

Research Assistant

Apr, 2013 - Oct, 2013

- Assisted with research on International Carbon Financial System based on carbon currency, with emphasis on Chicago Climate Exchange.
- **Research Project:** International Carbon Financial System Construction
- **Research Project:** Illusion and Reality of Bitcoins

CAMPUS AND INTERNSHIP

Tulane University	New Orleans, LA
<i>Global Collective Community Advisor</i>	Jul, 2015 - May 2016
<ul style="list-style-type: none">Managed residential hall of 150 students and supervised a staff team of three.	
Foresee Assets	Shanghai, China
<i>Investment Intern</i>	Aug, 2014 - Dec, 2014
Institute of Economics Student Union at Shanghai University	Shanghai, China
<i>Vice Minister</i>	Apr, 2013 - Oct, 2014
Bank of Communications Limited	Shanghai, China
<i>Credit Department Intern</i>	Jun, 2014 - Aug, 2014
Apple	Shanghai, China
<i>Campus Representative</i>	Apr, 2013 - Jan, 2014
China Pacific Insurance Company	Shanghai, China
<i>Accounting Intern</i>	Jul, 2013 - Aug, 2013

SKILLS

- CFA Level III Passed
- Data analysis and programming: Eviews, Bloomberg, Stata, Excel Modeling, SQL, Python, Matlab, R, Tableau, and C
- Language: Fluent English, Mandarin Chinese

CERTIFICATES

Managing Big Data with MySQL (Coursera Certificate)	Feb, 2016
Mastering Data Analysis in Excel (Coursera Certificate)	Feb, 2016
Bloomberg Essentials Training Program	Dec, 2015
Business Metrics for Data-Driven Companies (Coursera Certificate)	Nov, 2015
Financial Accounting (Coursera Certificate)	Sep, 2015

Frank H. Lewski
33 Colonial Terrace, Colts Neck, NJ 07722 USA
Phone: +1 908-415-7254
Email: flewski@verizon.net
Website: lewskiassociates.weebly.com

Frank Lewski is an experienced organization and leadership development consultant, coach and facilitator/educator. In this arena since 1986, Frank's experience with corporate organizations, non-profit groups and academia includes work with senior leaders and teams from diverse functions and cultures. In addition to the U.S., Frank has worked with clients in over 20 countries around the world. He currently splits his time between consulting projects to address complex organizational challenges, designing & facilitating advanced leadership, diversity, team and organization development programs, executive coaching, and offering his expertise to academia and non-profit organizations.

Areas of Interest/Expertise:

Leadership	Employee Engagement	Diversity, Equity & Inclusion
Organization Development (OD)	Conflict Resolution	Coaching
Change/Transformation Leadership	Cross-Cultural Interactions	Training/Workshop Design
Strategic Planning & Innovation	Team Development	Experiential Training/Facilitation

Employment History:

2010 – Present Lewski Associates, Colts Neck, NJ

Leadership & Organization Development Consultant, Coach and Facilitator/Educator

- Consulting senior leaders to address complex organizational challenges; executive coaching; designing & facilitating advanced leadership and organization development programs; adjunct instructor at Stevens Institute of Technology (since 2021)

December 2006 – December 2010 Alcatel-Lucent, Murray Hill, NJ

Senior Director, Organization Development

- Led a global Organization Development team, responsible for consulting/coaching senior leaders on organization transformation and employee engagement

April 2002 – December 2006 Lucent Technologies, Holmdel, NJ

Director, Strategic Organization and Professional Development

- Led a global team of Organization Development consultants and Learning Consultants, responsible for consulting/coaching senior leaders and developing management/leadership programs

1996 – April 2002 Lucent Technologies, Holmdel, NJ

Senior Consultant, Learning and Performance Center

- Consulted/coached Lucent leaders in areas of leadership, teams, diversity and organization development

1990 – 1996 AT&T, Somerset, NJ

Senior Training Consultant, AT&T School of Business

- Designed and delivered learning and development interventions in leadership, communications, diversity, team development and personal/career growth for AT&T and its customers

1986 – 1990 Bell Laboratories, Middletown, NJ

Member of Technical Staff

- Researched factors impacting effectiveness of R&D teams; designed and delivered training and consulted to leaders, in quality, management systems, leadership and team development

1981 – 1986 IBM, Poughkeepsie, NY

Middle Manager & Computer Engineer

Partial Client List

- Alyeska Pipeline
- AT&T
- Automotive Resources International (ARI)
- AXA
- BNY Mellon
- Bristol-Myers Squibb
- Canon
- Coca-Cola Enterprises
- Exelon
- FINRA
- H4B Chelsea
- Heico
- Hill & Smith
- Kuwait Foundation for the Advancement of Sciences
- Maimonides Medical Center
- MasterCard
- Munich Re
- Narragansett Bay Commission
- NASA
- National Grid
- Nestle Waters
- North American Partners in Anesthesia (NAPA)
- Prudential
- PSEG
- Puratos
- TATA Consultancy Services
- Time Warner
- Torre-Lazur Healthcare
- PSEG
- Raytheon
- Saudi Aramco
- Verizon
- Weichert Workforce Mobility

Client Industry Experience

High Technology (Telecommunications, Computers), Energy/Utilities, Financial, Pharmaceutical, Healthcare, Manufacturing, Fast-Moving Consumer Goods, Services/Consulting, Advertising, Construction, Insurance, Realty, and Non-Profit

Academic Experience

Adjunct Instructor: Stevens Institute of Technology (since 2021; Business School, Masters Level);
Guest Lecture: Rutgers University, Saint Elizabeth University, Monmouth University, Abu Dhabi University

Education and Professional Training Certifications

- 1997-1999 The American University/NTL Washington, DC
- Master of Science in Organization Development
- 1977-1981 The Pennsylvania State University State College, PA
- Bachelor of Science in Computer Science

Sample Professional Certifications:

- | | |
|------------------------------------|---|
| Professional Coach Certifications | - Adler International, Lore International |
| Strategic Innovation | - Outthinker |
| Myers-Briggs Type Indicator (MBTI) | - Otto Kroeger |
| EQ-i | - MHS |
| 360 Feedback | - PDI |
| Leadership Assessment Center | - PDI |

Publications

- “Stories of Change” (chapter) in “Orchestrating Collaboration at Work”, published by Jossey-Bass/Pfeiffer, 2003.
- “Weaving Story into our OD Tapestry”, OD International Conference Proceedings, 2001.
- “Team-Group Development Handbook”, internal publication, Lucent Technologies, 1998.
- “HR’s Role in Transformation: Assessments & Interventions”, internal publication, Alcatel-Lucent, 2009.

Michele Lewski, PhD
33 Colonial Terrace
Colts Neck NJ 07722

mlewski@verizon.net
732.740.2784 cell

Dr. Lewski is a full-time educator and consultant with a unique blend of knowledge and skills in leadership; human and organizational dynamics; organizational behavior; project and program leadership and management; management and business sciences. A strong technical background and leadership experience lend credibility and relevancy to her work. Achieving results through project, process, and organizational leadership has been a continuous focus of her work as an organization leader, consultant, coach, and educator.

Education and Certification:

The Fielding Graduate University - Santa Barbara, California -- 1997

Ph.D. -- Doctor of Philosophy in Human and Organization Development

The Fielding Graduate University - Santa Barbara, California -- 1995

M.A. - Master of Arts in Organization Development

Stanford University – Palo Alto, California -- 1984

M. S. - Master of Science in Operations Research

University of Pittsburgh – Pittsburgh, PA -- 1982

B. S. - Bachelor of Science in Industrial Engineering – minor in Psychology

Certified Project Management Professional (PMP)

Employment:

1994 – Present: Organization Consultant and Trainer, Private Practice

Clients range from Fortune 500 corporations to not-for-profit organizations

2018 – Present: Duke University ASEP Certificate Program

Deliver programs, in partnership with Duke University's Fuqua Business School

1995 – Present: George Washington University Masters Certification Program –Teaching programs in business analysis, project management, risk management and leadership development

2010 - Present: Stevens Institute of Technology: Adjunct Professor – MBA, PhD, & Masters in Technology Management Programs

Courses include management, project management, leadership, and a doctoral capstone program focused on innovation, entrepreneurship, communication and communicating value (associated masters, Ph. D., EMBA and corporate programs); Leadership Development and Executive Education

Consulting Areas of Specialty:

- leadership, coaching, and communication skills
- organization change and transformation
- organizational behavior
- developmental programs for teams and organizations
- strategic planning and partnering
- programs in facilitations skills, group dynamics, consulting skills, and personal growth
- leadership development programs and programs aimed at high-potential new-hires for large corporations
- project management and cross-functional teaming
- process improvement and streamlining

Clients include:

Sample of Recent Clients: 2021 – 2024: Erste Group, Stryker, Medtronic, Textron, Toby Dynavox, US AID, US Treasury, Senate, CDC, Department of Defense, Department of Homeland Security, FAA, Port Authority of NY/NJ/PA, LA Department of Health, US Navy, FEMA, Military Defense Agency

- **Pharmaceutical and Medical companies** – e.g., Novartis, Abbott Labs, Medtronic, Wyeth Labs, Stryker, Medco, Pfizer.
- **Technology/Telecommunications companies** – Cisco, AT&T, Lucent, Microelectronics (Agere); executives of a mid-size start-up venture in Mexico - Alestra
- **Commonwealth of Kentucky:** CIO, governor’s office, and numerous state agencies (including Transportation)
- **Large consulting firms** - Deloitte & Touch and Ernst & Young
- **Public sector:** Port Authority; Students, faculty, and administrators of several New Jersey school districts; Association of Medical Illustrators

- **Financial institutions** – Merrill Lynch, Credit Suisse, HSBC, Barclays, Vanguard; and the International Monetary Fund
- **Governmental Agencies** – U.S. Senate, CDC, FDA, National Institute of Health, Department of Homeland Security, Veteran's Health Administration, Department of Homeland Security, Department of Navy, Defense Acquisition, State Department
- **Energy** – BP and Exxon Mobile

She brings a global perspective - working with clients from throughout eastern and western Europe, Africa, Mexico, Asia and Bermuda

1994 – Present:

Educator, lecturer, facilitator:

Instructed well over 9000 participants in project leadership and management programs – in person and on-line; topics include:

- Project Leadership, Management, and Communications
- Leading Organization Change and Transformation
- Business Analysis & Skills
- Leadership Development
- Cross-Functional Teaming in Matrix Organizations
- Risk Management
- Negotiations and High-Impact Communication
- Managing IT Projects
- Project Management
- PMP Prep Bootcamp

Corporate Experience:

1983 – 1996: AT&T, AT&T-Bell Laboratories, Lucent Technologies

Fourteen years of corporate experience as a manager and leader of organizations ranging from sales to research and development. During that time, work led to the introduction or advancement of quality, operations, and process improvement practices, project management, change management, and strategic partnering within AT&T and Bell Laboratories organizations.

AT&T QUEST/Lucent Technologies QUEST: Oversight responsibility for an internal consulting organization. Key disciplines involved project management, sales leadership, change management, and process management

AT&T Business Sales Division: District Manager and project manager responsible for ensuring the quality of sales in the NY

Financial district, and Eastern region of the U. S.; established strategic partnerships between AT&T and its largest, most strategic clients

AT&T Bell Laboratories:

- Supervisor and District manager overseeing and leading efforts in process improvement, quality metrics, management science, software development practices, project management practices, and IT practices
- Member of Technical Staff working in R&D, quality, software development practices, project management practices, IT practices, and systems engineering

Publications:

- "From See-saw to Kaleidoscope: A Pattern of Perspectives on Work, Family and Self" - The Fielding Institute, M. L. Lewski Doctoral dissertation, (1996)
- Shared Expectations: A Best Practices Guide, AT&T Quality Library (1991)
- "Stories of Change", M. L. Lewski and F. H. Lewski "Orchestrating Collaboration at Work" Eds. VanGundy, A. B. and Laiman, L. Jossey Bass Pfeiffer (2003)

Sample Recent Professional/Academic Activities:

- Design and delivery of "Taking Charge of Change" ESI International (approved for Accreditation by George Washington University) – August 2013
- Design, development and delivery of "PMIS Workshop for the US State Department"; tested and trial with Syrian Deployment Team –2013/2014
- Renewal of PMP Certification – June 2013
- Design of "BP Planning Assessment and Validation" November 2013
- OLC Symposia: "From Chaos to Order: Thriving Virtually" Conference Presentation, April 2015
- Supported Research Initiative: "An Investigation and Analysis of Synchronous Faculty Preparation in the US" – 2017

Yang Li

Business School, Stevens Institute of Technology

800 Harbor Blvd, Weehawken , NJ 07086

Tel: +13102109271

Email: l50y100@gmail.com

EDUCATION

Wuhan University of Technology, Wuhan, China

B.S. in Material Science and Engineering (Advanced Class) Sep 2009-Jun 2013

Cumulative GPA: 83.3/100.0

Ohio University, Athens, US

Master in Mathematics

Jan 2014-Dec 2015

Cumulative GPA 3.647/4 ;
Program of Study GPA 3.83/4

University of Southern California, LA, US

Master in Mathematical Finance

Aug 2017-May 2019

Cumulative GPA 3.74/4 ;

Stevens Institute of Technology, Hoboken, US

Financial Engineering Doctoral Program

Aug 2019-Dec 2021

Cumulative GPA 3.74/4 ;
Program of Study GPA: 3.89/4

HONORS AND AWARDS

Wuhan University of Technology

- Special Scholarship for Advanced Class Students(Awarded **20 of 768**) Sep 2010
- Wuhan University of Technology Mathematics Competition Second Prize May 2011

RESEARCH EXPERIENCE

State Key Laboratory of Advanced Technology for Materials Synthesis and Processing, Wuhan, China

Thermoelectric materials chiral polymer compounds Synthesis and morphology control Mar 2011 - May 2012

- Responsible for sample preparation and testing. Collaborated with PhD candidates and utilized testing techniques including NMR SEM.
- Analyzed, graphed and reported on the results of Performance Testing

STANDARDIZED TEST SCORES

- TOEFL(iBT): 99 (Reading 30, Listening 27, Speaking 19, Writing 23)
- GRE: Verbal 157 (76%), Quantitative 167 (91%), Analytical Writing 3.5 (41%)
- GRE Math Sub: 850(86%)

EXTRACURRICULUM ROLES

Class Representative, Advanced Class

Sep 2009 - 2011

- Excellent Class Collective (Awarded 2%) 2010, 2011 & 2012
- Led members in preparing and participating in activities, performances and competitions
- Served as Conference Service Volunteer for:2011 International Top-level Forum on Nano Energy Materials & Nano-technology &&The Second International Material Forum(IMF2012) on Materials for Sustainable Energy and Environment

School of Business, Stevens Institute of Technology

- Teaching Assistant

Aug 2019- Present

- TA for FE530, FE535, FE541, FE543, FE550, FE610, FE621, FE680, BIA654, FA590

OTHER SKILLS & QUALIFICATIONS

- Proficient in Julia Scientific Computing, good in Rust, Java

ZEQUN LI

zli61@stevens.edu | (917) 863-6213

EDUCATION

Stevens Institute of Technology

Ph.D. in Financial Engineering

Hoboken, NJ

Expected May 2023

New York University Tandon School of Engineering

Master of Science in Financial Engineering

Brooklyn, NY

May 2018

- **Track:** Computational Finance

University of Rhode Island (Dual Degree Program)

Bachelor of Science in Applied Mathematics

Kingston, RI

June 2016

Bachelor of Science in Finance

December 2015

Zhongnan University of Economics and Law (Dual Degree Program)

Bachelor of Science in Finance

Wuhan, China

June 2016

EXPERIENCE

Stevens Institute of Technology

Teaching Assistant

Hoboken, NJ

September 2019-Present

- Assisted with teaching in Intro to Stochastic Calculus for Finance (Fall 2019), Stochastic Calculus for Financial Engineering (Fall 2019), Computational Finance(Spring 2020), Portfolio Theory(Spring 2020)
- Duties included producing solution manuals, grading homework, and holding office hours

Tradeview Ltd

Trading Operation Analyst

Manhattan, NY

September 2018-July 2019

- Developed Python scripts to automate daily operation tasks such as deploying Gmail and Google Drive API to read client's information data from email and attachments and performing compliance checks using Python packages Selenium and BeautifulSoup
- Selected and processed trading data from MySQL database to generate reports
- Identified problems affecting operation records and prices; collaborated with IT to resolve issues

New York University Tandon School of Engineering

Graduate Assistant

Brooklyn, NY

September 2017-May 2018

- Assisted with teaching in Quantitative Method in Finance (Fall 2017), Financial Econometrics (Fall 2017) and Stochastic Calculus (Spring 2018)
- Duties included producing solution manuals, grading homework, and holding office hours

University of Rhode Island

Student Assistant for Algebra

Kingston, RI

September 2015- December 2015

- Assisted the instructor with classroom management and in-class projects
- Held office hours to answer course-related questions

University of Rhode Island

Research Assistant

Kingston, RI

May 2015- December 2015

- Assisted Dr. Golden Dash on his book, Applied Risk Management: Derivatives, Neuroeconomics, and Automated Trading
- Developed profit equations for 27 option spreads in to be included in Chapter 7, "Profit Equation and Break-Even Point"

WuKong Investment Company

Summer Analyst, Equity Research Department

Shenzhen, China

July 2014-September 2014

- Analyzed financial situation of public companies using financial statements and economic data
- Developed financial models and used other analytical tools for stock and portfolio analysis and wrote analysis reports
- Contributed company profiles, industry trends, comparable companies, and presentation slides to morning meetings

ACADEMIC PROJECTS

New York University Tandon School of Engineering

Brooklyn, NY

Master Thesis: Pairs Trading Incorporate with Market Impact

June 2017-May 2018

- Used Stochastic control approach to find the optimal trading rate during the dynamic pairs trading with a linear market impact model that maximize the expected utility of investor's terminal wealth
- Proposed a pairs trading model with temporary and permanent market impact and a dynamic optimal trading strategy and developed a Hamilton–Jacobi–Bellman (HJB) partial differential equation by optimal stochastic control
- Solved the non-linear partial differential equation by finite difference explicit splitting method

PROGRAMMING & TECHNICAL SKILLS

Skills: Python, SQL, R, C++, MATLAB, LaTeX

Languages: Proficient in English, Native Mandarin

GERALD LIBBY

Weehawken, NJ | (480) 215-9706 | gerald.libby1@gmail.com | linkedin.com/in/gerry-libby

FINANCIAL OPERATIONS | PROJECT MANAGEMENT | ASSOCIATE PROFESSOR

Financial Operations professional, and Associate Professor of Business and Computer Science, with demonstrated experience providing product development, education, and entrepreneurial support for organizations both large and small. Proven ability in P&L management and in consultative services for SAAS products in marketing, sales, installation, ERP and electronic payment systems, and B2B purchasing. Known for supporting a variety of distribution, manufacturing, and retail systems, document management and both back-office and front-office systems. Diverse experience in Financial Services, Technology, and Start-ups.

Software Implementation
Consulting
Business Intelligence

Process Improvement
Analysis & Reporting
Operation Strategies

Integration
Project Management
Requirements Analysis

TECHNICAL PROFICIENCIES AND EXPERTISE

Microsoft Dynamics • Enterprise Software (SQL) • Professional Agile & Scrum Certification • Canvas Certification • Microsoft Customer Relationship Management (CRM) • Enterprise Resource Planning (ERP) Implementations • Microsoft Project • SaaS • SharePoint • Microsoft Sure Step Certification

EXPERIENCE

- Stevens Institute of Technology** – Hoboken, NJ **2023 - Present**
Adjunct Professor – Business Analytics and Operations Management (graduate level)
Teaches courses including Data Analytics and Operations Management.
 - Creates and conducts courses using Canvas and MS Teams.
- SADDLEBACK COLLEGE** – Mission Viejo, CA **2018 - Present**
Associate Professor – Business Information Sciences and Management
Teaches courses including Data Analytics, Project Management, Operating Systems, Information Systems, and Excel Proficiency.
 - Working with department head to develop a Data Analytics curriculum and degree.
 - Creates and conducts courses using Canvas and MS Teams.
- William Paterson University** – Wayne, NJ **2021 - Present**
Adjunct Professor – Business Management
Teaches courses including Operations Management, Systems Analysis
- ADMIRAL CONSULTING GROUP** – Monmouth, NJ **2021 - Present**
Senior Project Manager as a Consultant
Managed various ERP projects using Microsoft Dynamics-BC, -GP and -SL. Responsible for delivering client results as specified, on time and within budget with a 100% success rate.
- Monmouth University** – West Long Branch, NJ **2021 - 2023**
Adjunct Professor – Computer Science & Software Engineering
Teaches courses including Information Technology, Microsoft Office 365, Operating Systems
- AMERICAN EXPRESS** – New York, NY **2019 – 2021**
Senior Manager, Operations, Member of the B2B Payments Team

Managed supplier enrollment for B2B payment platform with the following accomplishments:

- Increased supplier enrollment and credit card revenue 10 times in a six-month period without increasing staff nor expenses.
- Was the “go-to” team member presenting and explaining supplier enrollment on the B2B network to clients.
- Recommended to the sales team how to increase supplier enrollment thus increasing revenue.
- Consulted with technology staff extracting key data vendor and payment data from clients’ ERP systems supporting the B2B network.
- Prepared instructions for both the sales team and clients extracting data from various popular ERP systems.

ACOM SOLUTIONS – Long Beach, CA

2015 – 2019

Manager – Client Solutions

Recruited to sell software and payment output management solutions that help organizations optimize and manage their complete document and disbursement lifecycles.

- Sold over \$1M per year in software and services and cultivated existing clients using various ACOM products.
- Supported and sold paperless automation and document management systems, conducting product demonstrations, evaluating client system requirements, architecting system solutions for clients and performing various project management activities.
- Conducted various presentations to large audiences on paperless automation technologies and their organizational benefits. Invited to be a panelist as a paperless automation expert.
- Worked with AP electronic payments team cultivating clients increasing vendor v-card enrollment.

ADMIRAL CONSULTING GROUP – Phoenix, AZ

2007 - 2015

Managing Director & Principal

Charged with opening the southwest and west coast offices of well-established east coast Microsoft Dynamics ERP & CRM partner.

- Built 100 client consulting practice in less than 2 years. Raised capital and built staff with no turnover.
- Focused consulting practice on specific vertical markets – food and nutraceutical processors, not-for-profit agencies, and professional services. Involved in all aspects of project cycle including pre-sales, sales, project planning, requirements, design, implementation, training, deployment, and support.

ePARTNERS, Inc. – Phoenix, AZ

2004 - 2007

Director and Client Partner

Managed all aspects of a \$10M region for an international consulting firm heavily involved with client relationships and strategic direction of the practice. Focused on Microsoft ERP and CRM system sales and implementations for middle market organizations.

ADDITIONAL EXPERIENCE

RLS ASSOCIATES, INC. – New York, NY

Founder and President

ELECTRONIC DISTRIBUTION CORP -- Hackensack, NJ

Co-Founder and Chief Financial Officer

SUZY SYSTEMS, INC., a subsidiary of Electronic Distribution – Hackensack, NJ

Co-Founder and Executive VP

DRIVER-HARRIS SYSTEMS, INC., a subsidiary of AMEX Co. – Teterboro, NJ

Vice President, Software Products

EDUCATION / PROFESSIONAL DEVELOPMENT

MASTER OF BUSINESS ADMINISTRATION (MBA)

Rutgers University, State University of New Jersey – New Brunswick, NJ

MASTER OF SCIENCE OF COMPUTER SCIENCE

New York University – New York, NY

BACHELOR OF SCIENCE OF MATHEMATICS

Fairleigh Dickinson University – Teaneck, NJ

Guest Lecturer – Microsoft, Arizona State University, Temple University, NY & NJ Dental Associations

EXPERT WITNESS EXPERIENCE

Compulink vs LR Hines, California

OIS versus Vertel, California

EdgeNet versus View22 Technology, Tennessee



Jeremy M. Livingston

Chief Information Security Officer

**CISO of
\$9B organizations
and 20,000
employees**

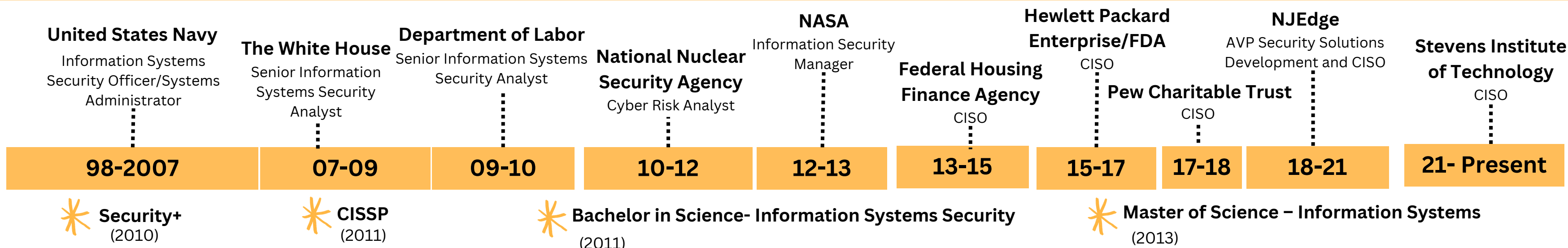
- Transformational technology leader that specializes in turn-around strategy for security programs.
- Compliance expert with a proven record of increased performance while exceeding regulatory requirements.
- Seasoned cybersecurity executive that achieves innovative results with maximum cost efficiency.

Compliance

Cybersecurity

Leadership

WORK
EXPERIENCE



SKILLS

NIST/FISMA/CUI/ISO Policy Implementation | Cyber Risk Management | Technology Security Strategy and Turn-Around | IT Governance | IT Security Program Development | Incident Response | Project Management | FAR COR certified | HIPAA/GDPR Regulatory Compliance | Change Management

Adjunct Professor

- Stevens Institute of Technology
- Howard Community College
- American Public University
- Liberty University

Speaking Engagements

ISMG Cybersecurity Conference - 2021,2022 | EdgeCon – 2019, 2020,2022 | NJ Digital Govt. Summit – 2020 | ISMG – 2021 | Scottish Rite Technology Security Summit – 2020 | Techspo - 2019

Boards/Advisory Roles

InCommon – Steering Committee
Educause – Security Advisory Committee
Cybersecurity and Privacy Professionals Conference Program -2022 Committee member
Eduroam – Chair of Eduroam Advisory Board
NJ Security Community of Practice - Founder/Chair

jeremylivin@gmail.com
 973.985.4996
[linkedin.com/in/jeremylivin](https://www.linkedin.com/in/jeremylivin)

FRANK T. LOCASTRO

7 Laurel Hill Drive
Newfoundland, NJ 07435
franklo13@yahoo.com
(917) 717-3326

PROFESSIONAL SUMMARY

Highly effective management professional that uses experience and creativity in solving complex challenges. Energetic and results-focused with success in developing and leading diverse teams to achieve outstanding results. Currently seeking a position where I can apply my skills and experience to enhance and further the mission and goals of a leading higher education institution.

SKILLS

Facilities Management
Construction / Project Management
Business Services & Administration
Budget preparation / administration
Purchasing & procurement

Enterprise Risk Management and Business Continuity Planning
Environmental Health & Safety
Space Planning
Staff Engagement
Leadership & Motivation

Education

2018 – 2021	STEVENS INSTITUTE OF TECHNOLOGY Master Business Administration (MBA), Finance Master of Science (MS), Technology Management	HOBOKEN, NJ
2001-2005	NEW YORK UNIVERSITY Bachelor of Science (BS), Real Estate	NEW YORK, NY

Experience

2017 – Present	STEVENS INSTITUTE OF TECHNOLOGY Assistant Vice President for Facilities & Campus Operations Responsible for the daily operations and management of the facilities, infrastructure, and grounds of the Stevens campus. Oversee the daily facilities management of fifty academic, administrative, residence hall and athletic facilities. Responsible for all capital improvement infrastructure upgrades, including electrical, HVAC and lighting systems.	HOBOKEN, NJ
----------------	--	--------------------

- Partners with and supports efforts and initiatives of the Vice President of Facilities & Campus Operations, as well as other members of the university’s leadership team.
- Responsible for maintenance and daily operation of the President’s on-campus residence.
- Manages and monitors all aspects of facilities and campus operations (preventive, corrective and scheduled) and construction projects to ensure quality standards are met consistently.
- Responsible for developing and managing operating and capital infrastructure budgets.
- Manages a diverse team of building operations and business services staff.
- Responsible for regulatory compliance and ensures ongoing division-wide reviews are conducted.
- Applies the principles of continuous quality improvement to measure, monitor and assess effectiveness and potential adverse effects of delivery of service to optimize improvement in services.
- Collaborates with multiple team members and actively participates with interdisciplinary teams and committees to ensure a best-in-class standard of care.
- Serves on university committees, Facilities Committee, Board of Trustees, Risk & Safety Committee, Sustainability Committee, Business Continuity and Emergency Management team.
- Supports and recognizes faculty and staff as important customers / stakeholders in university facilities matters.
- Actively supports facility related community efforts and represents the university in the community through participation in community outreach, local organizations, and dialogue with Hoboken residents.

- 2016-2017 **TRUST FOR GOVERNORS ISLAND** **NEW YORK, NY**
Vice President for Operations & Facilities
 Oversee Operations and Facilities at the Trust for Governors Island, a non-profit agency, which owns and operates Governors Island, a 172 acre island located in New York Harbor, that is comprised of historic land mark sites, 50 landmarked building totaling 1.4 million square feet of available space that is to be rehabilitated for commercial use, along with two developments zones, totaling approximately 40 acres, which is now in the early planning stages of re-development that will accommodate 5 million square feet of new commercial space.
- Oversee the daily operations and facilities management of the island which includes: 6 direct reports, an on-site engineering staff, security and ferry operations staff, janitorial staff, grounds and park maintenance staff, consultants, architects, and outsourced contracted service providers.
 - Serve as the lead manager in overseeing the initial phase of the activation and expansion of Governors Island, by planning and managing a \$500 million pre-development scope of work that will prepare the island for a combination of future commercial, academic, non-profit and technology tenants.
 - Plan and facilitate procurements, coordinate public approvals and permitting that support the Trust's mission, goals, and objectives.
 - Oversee the implementation of new enterprise systems, which include a new e-procurement platform, ARC GIS mapping of the island, an asset management system and preventive maintenance / work order system.
- 2011-2016 **CENTRAL PARK CONSERVACNY** **NEW YORK, NY**
Vice President for Operations Management
 Planned, managed, and accountable for the daily operation of Central Park, including all corporate functions concurrent with park-based operations, facilities management, budgets, systems, and support activities.
- Prepared quarterly progress reports to the President & CEO, as well as quarterly presentations to the Conservancy Board of Trustees
 - Managed park-wide horticulture programs, which include tree and turf care, annual planting schedules and maintenance and Integrated Pest Management (IPM) Program.
 - Managed an effective team of 240 operations staff with eight direct reports, including an AVP of Operations Management, Chief of Operations and five Director level positions in Horticulture, Facilities, Environmental Health & Safety and Volunteer Administration.
 - Reviewed all planned capital projects for Central Park for the purpose of developing an integrated, programmatic transition process between departments as capital projects near completion. Managed process, which ensured the Operations Department is properly staffed to maintain newly constructed Park landscapes and spaces.
 - Implemented Enterprise Risk Management (ERM) process, including formation of a Risk Management Committee and Environmental Health & Safety program. Served as co-chair and reported results to Trustee Audit Committee
 - Reduced organization's Workers Compensation costs and experience modification factor by 25%.
 - Researched, selected, and implemented new Operations Management System (OMS) used to plan, track, and record all preventive and daily park-wide maintenance.
 - Directed all purchasing and procurement activity to ensure compliance with company's policies and guidelines.
- 2007-2011 **ZENITHOPTIMEDIA** **NEW YORK, NY**
Vice President, Director of Facilities
 Managed facilities and operations including lease management and construction improvements for over 80 corporate locations in North America.
- Maintain company assets, optimize efficiency, limit risk, and capture operational costs.
 - Analyze and develop scenarios to advise company stakeholders on structuring FM responsibilities customized by site.
 - Establish processes for complying with local code regulations, life safety and emergency management procedures.
 - Created facilities purchasing models from conducting opportunity analyses based on organization's individual site opportunities, budget restrictions and maintenance requirements.
- 2005-2008 **HORIZONS THERMAL TECHNOLOGY** **NEW YORK, NY**
Owner
 Serviced domestic and international markets, providing clients with energy management services, thermal and acoustic Removable/Reusable insulation covers.
- Responsible for sales and overall daily administration
 - Served a diverse client base of corporate, industrial, and service utility companies.
 - Conducted heat loss analysis and provide energy management recommendations to clients.

- Responsible for ordering and inventory of the company's thermal and acoustic insulation product line.

1998-2005

NEW YORK UNIVERSITY

NEW YORK, NY

Manager of Academic Facilities

Managed and directed the strategic, technical, and administrative functions of approximately 3 million square feet of critical and complex academic facilities.

- Managed all aspects of daily facilities and event management at the Washington Square campus.
- Managed a combination of academic, library, classroom, laboratory, and meeting spaces. Ensured high quality standard of care and maintenance was always in place at all times
- Developed and managed annual operating budgets of approximately \$20M.
- Led the implementation of a new computerized maintenance management system (CMMS) to plan, track and record all planned and daily maintenance activity.
- Reduced annual operating expenses by 15% through competitive bidding and operational process improvements.
- Managed the base building and interior construction of the Kimmel Student Center, a 250,000 square foot facility with a \$50M construction budget.
- Managed lobby and clinic renovations at the David B. Kriser Dental center. Approximately 100,000 square feet of space, with a \$20M construction budget.

1995-1998

COMPASS MANAGEMENT & LEASING, INC.

NEW YORK, NY

Regional Director of Facilities

Managed a complex portfolio of corporate and academic facilities for commercial real estate owners and higher education institutions.

- Developed and implemented preventive maintenance protocols for client owned facilities.
- Managed maintenance staff, vendors, and critical infrastructure support teams.
- Developed, managed, and reported on annual operating expense activity to both senior management and our clients.
- Presented strategies and opportunities for operating improvements to clients.

1987-1995

OLYMPIA & YORK DEVELOPMENTS, USA

NEW YORK, NY

Property Manager

Responsible for the management and operation of 3 million square feet office tower in the Financial District and Midtown area of New York City. The tenancies of these properties included prominent financial institutions, insurance providers and other services.

- Managed company owned properties including: One Liberty Plaza, 425 Lexington Avenue, 245 Park Avenue and 59 Maiden Lane.
- Responsible for all building maintenance activity including HVAC and electric distribution systems, elevators, janitorial services, life safety systems and security.
- Managed building maintenance staff, engineers, vendors, and suppliers.
- Oversee and manage all planned building upgrades and renovations.
- Prepared annual operating expense budgets and variance reports.
- Monitored all tenant improvement construction for compliance with building standards, as well as compliance with NYC and national building codes.

Affiliations

EAB, APPA - Member, IFMA – General Member, Member USGBC of New Jersey, National Recreation & Parks Association – CPSI Certification

Community

Kids for Kids Foundation, Volunteer, Crohn's & Colitis Foundation, The Torch Foundation of New York, Rogosin Institute, Muscular Dystrophy Association, St. Johns Bread & Life

Personal

Enjoy traveling, swimming, and boating. I also enjoy time with my family and reading.

WILLIAM LONG

704-654-9083 * wlong57@gmail.com * <https://www.linkedin.com/in/wiliamlong57/>

EDUCATION

Stevens Institute of Technology

Ongoing

PhD in Financial Engineering

Courses: Portfolio Theory & Applications, Financial Technology, Fixed Rate Derivatives, Machine Learning in Finance, Stochastic Processes, Deep Learning, Probability Theory, Natural Language Processing, Mathematical Statistics, Dynamic Programming and Reinforcement Learning

The University of North Carolina at Charlotte

December 2018

Master of Science in Mathematical Finance

Concentration: Computational Finance

Courses: Financial Economic Theory, Advanced Financial Derivatives, Cross Section and Time Series Econometrics, Stochastic Calculus for Finance. Numerical Methods for Financial Derivatives, Financial Computing, Financial Econometrics, Analysis

North Carolina State University

December 2015

Bachelor of Science in Pure Math with a minor in Physics

Honors: Graduated *cum laude*, Consecutive semesters on the dean's list from 2013 through 2015

EXPERIENCE

Stevens Institute Of Technology Hoboken, NJ

Graduate Assistant

August 2019 - Ongoing

- Worked with a financial engineering professor to help teach stochastic calculus
- Graded homework and tests accurately and promptly
- Answered students' questions and helped them understand the material better

UNCC Finance Department Charlotte, NC

Graduate Assistant

August 2017 - May 2018

- Worked with a finance professor to help teach business law classes
- Maintained the grade and attendance records for all 350 students
- Maintained the online resources for the classes and graded assignments
- Reviewed class materials and tests with students
- Developed procedures and methods to improve the class

Ingles Market Asheville, NC

Cashier

March - October 2016

- Ran a check-out line at a supermarket
- Interacted with customers in fast paced environment
- Provided quick, efficient, and friendly service
- Was responsible for managing my till and never came up short

88.1 WKNC Raleigh, NC

On-Air DJ

Summer 2014 - Fall 2015

- Ran a weekly on-air music show and programming decisions
- Hosted on-air interviews with local musical guests
- Volunteered on service projects and community outreach programs

SKILLS

Programming with Python, Matlab, R, Stata, LaTeX, SQL, and Solidity

Earned the Blockchain Developer certification from the Consensys Developer program

SIYUAN MA

Cell: (+1) 201 238 3279 ◊ Email: sma13@stevens.edu

Work Address: 1 Castle Point Terrace, HOBOKEN, NJ 07030

EDUCATION

Stevens Institute of Technology

PhD in Finance Candidate

expect to graduate in 2024

Washington University in St. Louis

Master in Finance

2015-2016

Nankai University

Bachelor in Accounting

2010-2014

RESEARCH AGENDA

~~**Arbitrage Asymmetry, Mispricing Gap, and Momentum Prediction**, Siyuan Ma , Available at SSRN: <https://ssrn.com/abstract=4138394>, **Job Market Paper**~~

Abstract: The Mispricing Gap (Mgap) between overpriced winners and underpriced losers is a strong predictor of stock momentum both in-sample and out-of-sample. This predictability remains even when accounting for various state-of-the-art common risk factors and existing predictors. Moreover, it is not limited to a specific time window used for calculating the formation period return and mispricing score. A one standard deviation increase in Mgap boosts next month's momentum returns by 1.02%, which is 88% of the historical 1.16% return, highlighting its significant economic impact. This predictive power seems to stem from market efficiency determined by the dynamics of both sentiment investors and arbitrageurs. (Presented in New Zealand Finance Meeting 2022, Southwestern Finance Association 2023 Annual Meeting, Stevens Institute of Technology Brown Bag Seminar)

Not Every Factor Has Its Momentum, Siyuan Ma and Peixuan Yuan , Working Paper, Manuscript available upon request

Abstract: We adopt both qualitative and quantitative methods to classify factors into two categories: slow-moving factors (SFCs) and fast-moving factors (FFCs). We find that these two types of factors show significant differences in factor momentum up to 16 months, regardless of the classification method we use. Compared to FFCs, SFCs are less likely to remain in the same portfolio when we estimate the transition probability matrix. Because the majority of FFCs are constructed by taking the difference of SFCs, any investor sentiment associated with SFCs also largely disappears when the horizon extends. Therefore, the persistence of sentiment associated with these two types of factors also diverges significantly. Our results are robust across different sets of factor returns and different categorizing methods.

Horizon Pricing: Is It There?, Siyuan Ma , Working Paper, Manuscript available upon request

Abstract: Different anomaly factors dissipate at different speeds. Since asset returns have substantial commonality, the absence of near-arbitrage opportunities implies that factors attenuating at a slower speed covary more with the stochastic discount factor. However, I find that this is not the case. Both short and long-horizon factors show almost the same explanatory power in explaining factor returns irrespective of the return horizons.

Momentum and Reversal: The Impact of Arbitrage Timing, Siyuan Ma , Work-in-progress Paper

Abstract: Momentum generated by sentiment investors reverses in the long term because arbitrageurs

need time to identify and correct mispriced stocks. Evidence shows that momentum and long-term reversal are not separate anomalies but are driven by different investors at different times. Both underreaction and overreaction contribute to momentum, but the correction of mispricing caused by persistent overreaction takes longer due to arbitrage asymmetry.

OTHER PUBLICATIONS

Parametrically Computing Efficient Frontiers and Reanalyzing Efficiency-diversification Discrepancies and Naive Diversification, Siyuan Ma, Yue Qi and Zhang Yushu , *INFOR: Information Systems and Operational Research*(2019): 1-24.

TEACHING EXPERIENCE

Instructor, BIA 580 *Currently teaching*
Course description: This 3-credit course covers the major mathematical and statistical concepts that underly the field of business analytics. It does so at an elementary level but at a level sufficient to prepare students for success in the more advanced topics covered in the remainder of the BI&A curriculum. Each mathematical and statistical concept is illustrated through one or more business applications that bridge the gap between theory and practice and demonstrate how analytics is applied in practice.

Instructor, MGT 411, 412 (Research Track) *Rating:4.11/5.00*
Course description: Senior Design is a unique, two-course experience – mgt411 in the fall and mgt412 in the spring – that involves students working in teams on a real-world project related to one of three tracks (research, business consulting, or entrepreneurship).

Teaching Assistant, FIN 623
Course description: This course provides students with a rigorous introduction to the fundamental principles of finance. The primary concepts covered include the time value of money, principles of valuation, and risk.

INDUSTRY EXPERIENCE

Analyst Intern, Huarong Securities *Jul 2014 - Jan 2015*
Investment Bank Department
Analyst Intern, Morgan Stanley *Jul 2013 - Aug 2013*
Investment Bank Department
Analyst Intern, China International Capital Corporation *Jan 2014 - March 2014*
Investment Bank Department

PROFESSIONAL SERVICE

Reviewer
Emerging Market Review (ABS-2 Journal)

SKILLS

Programming Languages

R, Python

Languages

English, Chinese

Database

CRSP, COMPUSTAT, Lipper TASS

REFERENCES

Dr. Ying Wu (Committee Chair)

Associate Professor of Finance

School of Business

Stevens Institute of Technology

Email: ywu4@stevens.edu

Dr. Suman Banerjee (Department Chair and Committee Member)

Associate Professor of Finance

School of Business

Stevens Institute of Technology

Email: sbanerj2@stevens.edu

Dr. Anand Goel (Committee Member)

Associate Professor of Finance

School of Business

Stevens Institute of Technology

Email: agoel2@stevens.edu

Paul Magnone

paul.magnone@gmail.com www.linkedin.com/in/paulmagnone/ +1.914.310.7416 Norwalk, CT 06851

SUMMARY

Business builder and systems thinker, focused on making the complex simple, understanding where technology and innovation are headed, and determining what can have impact for your business. I have been at the forefront of technologies that change how businesses operate – broadband, dot.com, service oriented architecture / web services, 5G mobility, big data, cloud, Generative AI. I thrive in rapidly bringing structure to the ambiguity of a complex data-driven landscape and shaping a new business by achieving early market traction including directing customer focused execution with excellence.

EXPERIENCE

Google, Head of Americas Cloud Ecosystems and Partnerships Nov 2015 to present
Teaming with strategic partners to unlock next generation business capabilities and outcomes for clients. Established the initial portfolio of system integrator partners and led the 5-time Global top partnership (Deloitte Consulting). Created the initial Google Cloud AI Partner Summit (2017) and led the AI / Smart Analytics Partner Track at Google NEXT 2018+2019. Co-created solutions in Healthcare, Life Science, Retail, Telco, and Media. Co-led market assessment and go-to-market planning for GenAI launch (2022-2023).

Deloitte Consulting LLP, Innovation Portfolio Lead for New Product Development Nov 2013 to May 2015
Led idea sourcing, market evaluation, and agile development for a diverse solution portfolio addressing business shifts driven by emerging technology (i.e. wearable tech for healthcare; predictive analytics cloud)

Openet Telecom (now Amdocs), VP, Global Alliances Feb 2010 to May 2013
Alliance leadership of IBM, Juniper, and other partners including formation of the global go-to-market strategy and managing revenue opportunities addressing mobility, cloud, and analytics. IBM Beacon Award recipient.

IBM, Program Director, Global Business Development Lead, Client Executive 1988 to 2009

- Designed and led four global strategic consultancies (Grid, Open Source, SOA, Service Management) yielding over \$1B in revenue on \$15M of incremental investment. Directed cross discipline teams of 40 experts driving offer management; enablement; alliance development; initial sales and delivery execution
- Drove acquisition integration of a \$780M Service Management software firm and grew the segment from \$26M to \$180M in revenue and 12 to 250 practitioners with 5 international centers in 18 months.
- Led business due diligence on multiple alliances and acquisitions for internet, telco, and cloud ventures.
- Managed strategic relationships with US, EU and Israel VC/PE firms (Kleiner Perkins, Sequoia Capital, Pequot, Draper Fisher, Accel-KKR, BRM, Israel Seed, OurCrowd, et al)
- Assessed 200+ start-ups for potential go-to-market partnerships including negotiation of IP licensing.
- Initial business development leader addressing the emerging internet / dot.com sector including equity-for-value deals and strategic partnerships
- Designed and led a JointNortel-IBM Development Center for new federal and telco solutions
- Led consultative sales and first-of-a-kind projects at AT&T / Bell Labs (20% YoY growth over 9 years)

EDUCATION

- Bachelor of Engineering, Electrical Engineering, Stevens Institute of Technology, 1988
- Masters of Management Science, Technology Management, Stevens Institute of Technology, 1993
- MIT Executive Education, Applied Data Science Program, August 2023
- Columbia University, Executive Program, Private Equity and Venture Capital, Nov 2021 - May 2022
- Harvard Negotiation Project (HNP) Workshop, Harvard Law School via IBM
- Babson Innovation & Entrepreneurship executive workshop via IBM

IMPACT

A leader in the field, deconstructing complex business problems with clients and colleagues across 4 continents and 35 countries

A proven track record of success, launching 6 business units, authoring 5 patents, and helping many achieve their personal and professional goals

Author:

- **Decisions Over Decimals: Striking the Balance Between Intuition and Information**, 2022 (Wiley) dodthebook.com
- **Drinking from the Fire Hose, Making Smarter Decisions Without Drowning in Information**, 2011 (Portfolio)
- A TEDx speaker, also featured in HBR, Inc., FastCompany, Chief Executive, Forbes, Wharton Business Radio, Harvard's Digital, Data & Design Institute and Malcolm Gladwell, Susan Cain, Dan Pink, Adam Grant's 'Next Big Idea Club.'

Adjunct Professor, Columbia Business School

Aug 2015 to present

- Thought leader addressing decision making; innovation and entrepreneurship
- Faculty co-Director [B7676-100 Leading in a Data-Driven World: Developing Quantitative Intuition \(QI\)™](#)
- Adjunct Faculty participating in the Digital Futures Initiative, as part of the Humans in the Digital Economy Lab

Start-up Mentor / Coach

April 2015 to May 2016

- Launch of an NSF I-Corps™ medical device startup via Customer Development / Lean Startup methods

May 2009 to Jan 2010

- Built / launched in 3 months an online gaming platform addressing unique analytics overlooked in fantasy sports
- Utility patents filed and Angel funds secured. Endorsed by 12 NFL legends and recognized by Sports Illustrated for category innovation

Nicole Malantchouk

Hoboken, NJ
portner.nicole@gmail.com
(609) 744-5505

AREAS OF EXPERTISE

- Accomplished educator and administrator with more than 8 years in higher education with a focus of student success and strategic management
- Experienced with in-person, hybrid and online learning modalities and educational technologies to create strong faculty-student engagement
- Committed to diversity, equity and inclusion through practice, self-reflection, continued education and listening

EDUCATION

Doctor of Education, Strategic Leadership in Education
Vanderbilt University

Master of Science, Information Systems, Business Intelligence & Analytics Graduate Certificate
Stevens Institute of Technology

Bachelor of Science, Business & Technology
Stevens Institute of Technology

TEACHING EXPERIENCE

Course Designer and Instructor, Business Career Seminar
The Business School, Stevens Institute of Technology
August 2016 – Present

- Develop curriculum to align with industry trends of student recruitment
- Instruct undergraduate business students in mandatory course required for graduation
- Tailor sections to accommodate 8 business majors and students' varied career interests
- Incorporate guest speakers from industry to create engaging and interactive lectures

Co-Facilitator, Inclusive Leadership Staff & Faculty Workshop
The Business School, Stevens Institute of Technology
February 2023

- Reviewed and edited teaching materials with peers for applicability to staff and faculty
- Co-facilitated workshop for 65 faculty and staff members

Co-Facilitator, Inclusive Leadership Student Workshop
The Business School, Stevens Institute of Technology
August 2022

- Provided input on workshop materials and activities developed by faculty
- Co-facilitated workshop for 50 first-year students during orientation

Instructor, Higher Education Career Development, Leadership & Application
School of Education, Drexel University

September 2021 – December 2021

- Taught Master and Doctoral level students to develop critical skills for professional advancement within traditional and non-traditional career pathways
- Coached students in office hours to apply course content in career plans and professional interactions

HIGHER EDUCATION EXPERIENCE

Corporate Outreach & Professional Advancement

The Business School, Stevens Institute of Technology

Director (May 2022 – Present)

Assistant Director (May 2018 – April 2022)

Manager (February 2015 – April 2018)

- Oversee the development and implementation of strategic partnerships and career development programs for 2,200 STEM students enrolled in the School of Business
- Serve as point person for cross-departmental collaboration to successfully support students and employers
- Lead 2 direct reports and engage a team of 4 coordinators and 6 directors as an internal consultant on talent development processes and events
- Strategize and execute an industry outreach plan to promote CRAFT and solicit new members
- Published a career resource intranet for students that includes interview preparation, resume help, networking tools and email templates for employer correspondence
- Created a structured and formalized process for international students to be successful at sourcing internships and full-time employment

Operations Manager, Hanlon Financial System Center

The Business School, Stevens Institute of Technology

February 2016 – February 2018

- Drafted and submitted grant applications for funds to support the financial labs and research
- Managed relationships with laboratory sponsors and technology vendors
- Raised money from alumni and corporate partners during events to support student research projects and the SSMIF

Project Manager, Howe School Alliance for Technology Management

The Business School, Stevens Institute of Technology

February 2015 – May 2016

- Organized annual event for 150+ educators and industry professionals
- Hosted monthly workshops for industry partners focused on topics of innovation, leadership and challenges in the workplace
- Pitched new businesses to join the consortium and sponsor research projects and scholarships for students

INDUSTRY EXPERIENCE

Asset Management Division

JPMorgan Chase & Co.

Associate (June 2014 – February 2015)

Analyst (July 2012 – June 2014)

- Educated the global organization of 1,500 employees on industry regulatory changes, creation of a secure control environment through training, and strategic communications on behalf of the Chief Control Officer
- Led quarterly townhalls broadcasted to the global organization and provided updates on critical projects
- Collaborated with Compliance, Risk and Legal to develop best in class policies and procedures that incorporated stakeholder feedback
- Met quarterly with federal regulators to review progress and consult on new initiatives
- Recruited top talent from local universities and a workforce re-entry program annually

LEADERSHIP & SERVICE

Founder & Treasurer

Ukraine Relief Aid – Friends of Chervonohrad

2022 – Present

- Launched programs to build sustainable educational programs for elementary students and medical training programs for therapists and ophthalmologists
- Created administrative processes for social media posts, accounting, and corporate outreach
- Built relationships with companies and obtained basic needs supplies. Established supply chain network to get supplies from the US to refugees in Ukraine
- Sponsored Senior Design consulting project resulting in a social media marketing plan, a grant proposal and partnership outreach to expand operations

Fundraising and Event Planning Coordinator

Friends of the Hoboken Family Planning Clinic

2019 – Present

- Host annual fundraiser and coordinate digital giving day to reach \$30k annual goal
- Oversee social media marketing and email campaigns to donor population and promote clinic achievements, fundraising goals, and upcoming events
- Liaise between clinic and local college student volunteers for events and projects

CONTINUING EDUCATION

12Twenty: 12Twenty Administrator Training	2022
Stevens Institute: Workday training	2021
Stevens Institute: Ally training	2020
Stevens Institute: Microsoft Teams training	2020
National Career Development Association: Facilitator Training	2018
Salesforce: Administration Essentials	2018

INSTITUTIONAL SERVICE & ENGAGEMENT

SIT School of Business Dean's Council	2019 - Present
SIT School of Business Dean's Student Advisory Council	2019 - Present
SIT School of Business Finance Advisory Board	2019 - Present
SIT Fashion Association of Marketing and Entrepreneurs Faculty Advisor	2018 - Present
SIT Women's Varsity Soccer Faculty Mentor	2017 - Present
SIT Women in Business Faculty Advisor	2016 - Present
SIT Women's Varsity Tennis Faculty Mentor	2015 - Present
SIT HR Spirit Day Volunteer	2023
SIT Graduate Co-Operative Education Working Group	2021 - 2023
SIT School of Business Advisory Board – Placement Subcommittee Lead	2020 - 2023
SIT Leadership Development Experience for High Performing Staff	2022
SIT Vice President of Student Affairs Search Committee	2022
SIT HR Flexible Work Arrangement Working Group	2021 - 2022
AACSB Accreditation & Re-Accreditation Working Group	2018, 2020, 2022
SIT School of Business Dean's Committee	2018 - 2020
Hanlon Financial Systems Center Advisory Board	2017 - 2020
Annual Stevens Alumni Awards Selection Committee	2018, 2019
SIT School of Business Innovation Day Judge	2018, 2019
SIT HR Employee Satisfaction Committee	2019
SIT Associate Dean of Operations, Business School Search Committee	2018
SIT HR Performance Review Evaluation Working Group	2018
SIT Vice President of Development & Alumni Engagement Search Committee	2018

TECHNOLOGY PROFICIENCY

- Data Analysis & Visualization: R, SAS, Tableau
- Google Suite: Google Doc, Google Drive, Google Sheet, Google Slides
- Learning Management Systems: Blackboard, Canvas
- MS Tools: Access, Excel, Office, Outlook, PowerPoint, Teams, Word
- Student Information Systems: 12Twenty, Salesforce, Slate, Workday
- Teaching Tools: Perusall, Poll Everywhere, Zoom

REFERENCES

Kristen Betts, Ed.D.

Clinical Professor, School of Education, Drexel University
(912) 257-8336 | kbetts@drexel.edu

Michelle Crilly, M.S.M.

Assistant Dean of Student Success, School of Business, Stevens Institute of Technology
(201) 216-8983 | michelle.crilly@stevens.edu

Warren Petty, Ed.D.

Vice President & Chief Human Resources Officer, Howard University
(516) 510-8433 | warrenpett@gmail.com

Alan C. Maltz, Ph.D

+1 561-632-4848

Present Position

Executive-in-Residence

Program and Project Management
School of Business
Stevens Institute of Technology
Castle Point on Hudson
Hoboken NJ 07030
Phone: +1 (561) 632-4848
E-mail: alan.maltz@stevens.edu

Professional Interests

Research

Program and Project Management
Organizational Management
Corporate Entrepreneurship

Teaching

Project Management

Education

Ph.D	2001	Stevens Institute of Technology	Technology Management
MBA	1974	Pace University	Management Science
B.Eng.	1971	City College of New York	Electrical Engineering

Professional Certifications

Professional Engineer – New York and New Jersey(retired)

Professional Society Memberships

Professional Engineer

Academy of Management

Senior Life Member, IEEE

Member, Project Management Institute

Professional Development

Attended WEBCT/Moodle/ Canvas training workshop (2007 - 2024)

Reviewer for Long Range Planning, Journal of Engineering and Technology Management

Doctoral Committees

Virtual Distance(TM): A proposed model for the study of virtual work
by Sobel Lojeski, Karen, **Stevens Institute of Technology**, 2006.

An agile framework for an information technology outsourcing decision process (ITODP)
by Zandoli, Robert, **Pace University**, 2006.

Determinants of academic entrepreneurship behavior: A multilevel model
by Llano, Joseph Anthony, **Stevens Institute of Technology**, 2010.

Te Wu, Integrating Resource-Based View and Stakeholder Perception on Improving
Project Performance - Closing the Gap between Project Success and Project
Management Success. Pace University.

Non-Academic Experience

2019 – present Vice President , Ballen Isles HOA
2005 - 2014 Partner, Comsci LLC
1995 - 1997 Executive Vice President and Director - Brite Voice Systems
1986 – 1995 President and Founder – Telecom Services Limited
1974 – 1986 Vice President, Telecommunications Systems - Bankers Trust Company
1972 – 1974 Project Engineer – Western Union
1971 - 1972 Project Engineer - New York Telephone.

Academic Experience

2001- 2004 Visiting Assistant Professor - Stevens Institute of Technology
2004 - pres. Executive-in-Residence- Stevens Institute of Technology

Career Highlights

Thirty years of business and management experience at large corporate organizations as well as founder of two successful technology start-ups. Dr. Maltz is currently an Executive-in-Residence of Business at Stevens Institute of Technology. Prior to this, he served as an Executive Vice President and Director of Brite Voice Systems, Inc (public company). Dr. Maltz recently served on the Board of Directors of Callwave, Inc.

(CALL). He was recently a partner and co-founder in ComSci, LLC a leading provider of IT Business Management Solutions.

At ComSci, Dr. Maltz was involved with the strategy, product development and marketing of their cloud-based IT Business Management solution. Major clients include Goldman Sachs, Memorial Sloan Kettering Cancer Center, The New York Stock Exchange, McGraw Hill and The Bank of New York Mellon. Dr. Maltz devotes approximately 40% of his time in client engagements and consulting roles with many of these organizations.

Teaching

Courses Taught

School of Business

MS / MBA: Mgt 609 Project Management Fundamentals
Mgt 613 – Project Portfolio Management and the PMO
Mgt 802/803 – Project Management Exam
PhD: Mgt 726 Seminar in Management

Curriculum Development

: Mgt 609 Project Management Fundamentals

Develop /Academic coordinator: Mgt 613 – Project Portfolio Management and the PMO

Coordinator- Mgt 802/ 803

Developed – Qualification PM PhD exam

Intellectual Contributions

Publications

Refereed Journal Articles

“New media in marketing redefine competitive advantage: A comparison of small and large firms”. With Gary S. Lynn, M. Peter Jurkat, and Michael D. Hammer. **The Journal of Services Marketing**. 1999. 13(1). 9-20. [ABS 2]

“Project Success: A Multidimensional Strategic Concept” (with A. Shenhar, D. Dvir and O. Levy). **Long Range Planning**. 2001. 34. 699-725. [ABS 3]

“Beyond the balanced scorecard: refining the search for organizational success measures”. (with A. Shenhar and R. Reilly). **Long Range Planning** 2003. 36.2. 185-201. [ABS 3]

“Project Success – A Multidimensional Strategic Concept” by Aaron J. Shenhar, Dov Dvir, Ofer Levy, and Alan Maltz, in **Linking Projects to Business Strategy**, Project Management Institute, Newton Square, PA, 2007. [ABS 2]

“Integrating Success Scorecards Across Corporate Organizational Levels” (with A. Shenhar, D. Dvir and M. Poli). **The Open Business Journal**. 2012. 5. 8-19.

“Success comes in many dimensions: The critical role of the human capital and preparing for the future in every organizational scorecard” (with Aaron J. Shenhar, Dov Dvir and Haoyu Gao). **British Journal of Economics, Management & Trade**. 2014. 4(10). 1555-1576.

“Successful MetLife Integration -- A Three Year Project Completed within Seven Months” (with Haoyu Gao). **Journal of Case Research and Inquiry**. 2015. 1. 43-63.

Articles in-progress

“Capability Effectiveness Testing for Architectural Resiliency in Financial Systems” (with Paul Rohmeyer, Tal Ben-Zvi, Donald Lombardi). **International Journal of Innovation and Technology Management**. [ABS 1]

Refereed Conference Proceedings

Rohmeyer, P., Ben-Zvi, T., Lombardi, D., and Maltz, A. “Capability Effectiveness Testing for Resiliency in Financial Systems”, Proceedings of the Portland International Center for Management of Engineering Technology (PICMET) Conference, Portland, Oregon, July 2017

“Defining and Measuring Organizational Success” (with A. Shenhar, and D. Merino). Presented at PICMET 2001.

“Managing telecommunications as a business”. **A presentation to the Securities Industry Association Information Management Conference**. June 5, 1996.

Book Chapters

“Project Success: A Multidimensional Strategic Concept” by A. Shenhar, D. Dvir, O. Levy and A. Maltz. in **Linking Projects to Business Strategy**, Project Management Institute, Newton Square, PA, 2007.

Other publications

“Television cables Save Money for Bankers Trust in wideband data network”. **Data Communications**. 5(3). May/June 1976. 81-86.

“Bankers Trust: BTNet pockets profits with packet switching”. **CommunicationAge**. April, 1984. 26.27.

“Banking on packet switching”. **Computerworld on Communications**. 1986. 91-93.

Service

School and Institute Service

Academic coordinator: Mgt 609 - Project Management Fundamentals
Mgt 613 - Project Portfolio Management and the PMO

Coordinator- Mgt 802/803 Project Management Exam

Developed – Qualification PM PhD exam

Government and Public Service

Government – NASA (2005) Reviewer for Cooperative Program In Space Science for the USRA

Awards and Honors

Awards

Best PhD dissertation in Technology Management (2001). Stevens Institute of Technology

Fellow of Professional Society

Member, IEEE

Board Memberships

Brite Voice (1996-1999)

Callwave (1999-2004)
ComSci LLC (2005-2014)

Caitlin McClure

30 Eastchester Road, Apartment 6A, New Rochelle, NY 10801
(917) 449.6266 • caitlinmcclure@me.com

Other PR = 0

PROFILE

- 25 years of experience designing and leading professional development programs, from C-Suite to new hires.
- Master facilitator and instructional designer, specializing in experiential learning and emotional intelligence.
- Confident, adaptable team member, coach, and creative problem solver with excellent communication and organizational skills.
- 2,000+ hours coaching: designing programs, teaching, coaching others, being coached.
- Editor of *Applied Improvisation: Leading, Collaborating and Creating Beyond the Theatre* published by Bloomsbury Press, 2018. The second in the series, *The Applied Improvisation Mindset* is due August 2021.

PROFESSIONAL & ORGANIZATIONAL DEVELOPMENT EXPERIENCE**Impact International, Greenwich, CT**

Senior Consultant (Freelance)2020-present

Design and facilitate experiential, online-only leadership development programs to support leaders, worldwide, to respond with agility to the multiple crises brought on by the pandemic: broken supply chains, sudden work-from-home requirements, record-setting unemployment, travel restrictions, and industries facing either immediate obsolescence (hospitality) or unimaginable pressure to perform (biotech). External crises include blurring boundaries between personal, professional and societal thanks to the Black Lives Matter movement, climate catastrophes (e.g., the wildfires on the West Coast of the U.S.) and political strife.

Experiential learning forms the foundation of all interventions, ranging from high-touch 10-month leadership journeys, to 3-hour sessions over 3-week intervals. Clients include Pfizer, J&J, Thermo Fisher Scientific, Bristol-Meyers Squibb, and Faurecia.

Senior Consultant (Full-Time)2017–2020

One of nine full-time senior consultants who designed and delivered development solutions throughout the US. Client-facing solutions included designing/facilitating experiential learning programs, needs analyses, group/individual coaching and managing client relationships. Internal responsibilities included leading internal client solutions teams, creating sales proposals, and creating internal processes and intellectual property. Annual book of business \$1M. Clients included US and global companies in finance, grocery, pharmaceutical, truck manufacturing, and healthcare products.

Program topics include leading through uncertainty, giving/receiving feedback, powerful communications, emotional intelligence, building trust, and strategic alignment. Programs run from 3 hours to 12 months. Notable projects include:

- Creating year-long blended learning solution for senior managers intended to build bench strength at German-based grocery chain undergoing massive upheaval (e.g., a dramatic downturn in revenues, CEO replacement, 200% turnover); final participant feedback resoundingly praised my nimble facilitation and credited the program with helping build cohesion, psychological safety and optimism among the participants, removing communications barriers between the functions, and creating a pool of candidates for executive roles.
- Creating an interactive, 1-day Agile Leadership program for regional pharmaceutical sales managers; participants later requested versions of the program be delivered to their teams twice more that year.
- Incorporating Applied Improvisation methodologies into existing Impact program designs resulting in higher engagement in both participants and fellow facilitators.

Tiffany & Co., New York, NY

Senior Specialist, Organizational Effectiveness2016–2017

As one of Tiffany's two OE consultants, created custom solutions for individuals and teams. Notable projects included:

- Improved ability of 20 distribution coordinators to deliver feedback in a consistent, timely fashion. Project revealed lack of role clarity was the most significant barrier, not lack of skill/willingness.
- Worked remotely with a retail leader's team before the 2016 holiday sales push. Offered individual and group Myers-Briggs consultations to deepen their self-awareness and better communicate. The store ranked in the top 10 for holiday revenues that year.
- Coached an Antwerp-based finance director to upskill and set new expectations for her managers in Botswana and Mauritius, while simultaneously being perceived by her NY-based senior director as a strategic thinker; she later reported stronger relationships with all parties and significantly improved performance by her team.

Tiffany & Co., New York, NY

Senior Specialist, Management Development2011–2016

One of three members of the internal team responsible for identifying, developing, facilitating and managing leadership development initiatives, programs and assets across the global organization (\$500K annual budget)

- Facilitated Tiffany & Co.’s three core management development programs for first- and second-level leaders (350 leaders annually over 18 sessions), virtual (semester-length) and face-to-face (2- and 3-day).
- Integral partner in design, consulting and facilitating the Tiffany Academy for Excellence, an 18-month rotational program for high-potential candidates.

Caitlin McClure Consulting, New York, NY2008–2011

- Designed and led 50+ programs, including: five key attributes of strategic thinking, the emotionally intelligent leader, managing the mentor-protégé relationship, listening for leaders, coaching conversations, solutions focus coaching, the neuroscience of play, right-brain thinking, facilitation training, and living your company’s values.
- Coached CEO and senior team of \$3B company on messaging and executive communication skills; coached others formally and informally with career and management concerns.
- Negotiated contracts, conducted needs analyses, led focus groups, trained trainers, delivered assessments, organized and led pilots, and created facilitator guides and course materials.
- Clients included: ZS Associates, Sloan International, Columbia University, the Ball Foundation, University of Chicago’s Booth School of Business, California Public Libraries, Avaya, Morgans Hotel Group, Women’s Transportation Seminar, NFI Industries.

Performance of a Lifetime, New York, NY 2002–2008

Lead Facilitator

One of 30+ contractors at this theater-based leadership development consultancy. Designed and led more than 20 programs, including: executive leadership, women’s leadership, handling difficult conversations, new manager training, and fundamental communication skill development.

Clients included: PricewaterhouseCoopers, the US Olympic Committee, Lehman Brothers, Citibank, American Express, and PNC Bank.

Goldman Sachs, New York, NY 2000–2001

Training and Development Assistant

Coordinated the Pine Street Initiative to develop Goldman’s senior managers, and other executive-level leadership programs. Interfaced with senior management, outside consultants, and internal trainers.

EDUCATION

- M.A. in Adult Learning and Leadership—Columbia University, New York, NY
- B.A. in Art History—Mills College, Oakland, California
- Extensive communications and theater training, including improvisation, theater, voice, and commercial acting

CERTIFICATIONS

Hogan Assessment Suite, Korn Ferry/PDI Ninth House PROFILOR 360, Myers-Briggs Type Indicator, GROW

ADDITIONAL SKILLS

- Expert graphic design skills
- Competent with conversational French

ROBERT STERLING MEYER

LAWYER PASTOR PROFESSOR ADMINISTRATOR



CONTACTS

EMAIL:

frbob@stteresaavila.org

PHONE:

908-277-3700

TWITTER:

@frbobmeyer

LINKEDIN:

[robert-sterling-meyer](https://www.linkedin.com/in/robert-sterling-meyer)

BEHIND STAINED GLASS:

st-teresa.org/blog

Robert S Meyer is an experienced lawyer and mediator with a demonstrated 24-year history of working in diverse and complicated settings. His expertise in contract law, coupled with his incredible people skills has made him a much sought after consultant in universities and small businesses. Having received his JD from Seton Hall School of Law propelled him to become a strong social justice advocate who focuses on community involvement and responsibility.

LEGAL & ADMINISTRATIVE

- 2021 – PRESENT**
ASSISTANT TO THE GENERAL COUNSEL, SACRED HEART UNIVERSITY
Responsible for review of all University contracts ensuring compliance with the law and University policies and procedures
Responsible for training and coaching of University employee in contract negotiations
- 2013 – 2023**
FOUNDER, BOARD MEMBER, THE WATERFRONT PROJECT
Founded the nonprofit to assist Hudson County's economically disadvantaged people through pro bono legal representation, as well as by providing advocacy, advice and information on civil issues, including, but not limited to, landlord-tenant, sexual assault and others
- JANUARY 2008 – APRIL 2010**
CHIEF OF STAFF TO THE PRESIDENT/CEO, ST VINCENT MEDICAL CENTER
Served as Secretary to the Board of Directors
Managed President's day-to-day schedule
Represented President at public events
Supervised Department of Pastoral Ministry
Oversaw budget in President's Office of \$1M
- JANUARY 2005 – DECEMBER 2007**
LEGAL ATTACHÉ, HOLY SEE MISSION TO THE UNITED NATIONS
Representative to Third (Human Rights) Committee and Sixth (Legal) Committee
Representative to UNICEF, UNDP
Prepared legal briefs and strategic position papers
Chief Negotiator at the General Assembly
- 1995 – 2012**
MARRIAGE TRIBUNAL JUDGE, ARCHDIOCESE OF NEWARK
Adjudicated annulment hearings in light of justice, pastoral concern, and canon law
Served as Defender of the Bond
- 1993 – JUNE 2010**
ASSOCIATE VICE PRESIDENT FOR STUDENT AFFAIRS, SETON HALL UNIVERSITY
Reporting to the Vice President
Responsible for the supervision of key non-academic areas (Security, Parking, Career Services, Judicial Services)
Served as student liaison and ombudsman
Chair of Human Relations Council, ensuring respect, diversity, and inclusivity

EDUCATION

1996 - 2000

JD, CIVIL LAW

Seton Hall University School of Law

*Advanced writing on Nonprofit
Boards of Directors*

1990 - 1992

JCL, CANON LAW

The Catholic University of America

*Advanced writing on Directors
of Religious Education*

1987 - 1988

STL, MORAL THEOLOGY

Pontifical Lateran University

*Advanced writing on Institutional Ethics
Committees in Catholic Hospitals*

1985 - 1987

**STB, THEOLOGY –
THEOLOGICAL STUDIES**

Pontifical Gregorian University

1980 - 1984

BA, PHILOSOPHY

Seton Hall University

*Advanced writing on Soren
Kierkegaard and "The Leap of Faith"*

LEADERSHIP

OCTOBER 2017 –
PRESENT

PASTOR, ST TERESA OF AVILA PARISH

Shepherding parish of 2,000+ families

Increased engagement and revenue by 25% to an average of \$2.2M and profitability by 32% over a period of three years

Reconfigured parish staff and responsibilities to model servant leadership

Revitalized parish ministries to read and respond to the signs of the times especially in COVID-19

Restored financial management and cash flow of \$4M budget

Supervised approximately 30 full- and part-time employees in addition to a rotating team of clergy and religious

Running of and responsible for a cemetery of over 9,000 graves and a mausoleum with nearly 2,000 crypts and niches

Oversaw projects at Cemetery and Mausoleum including roof replacement (\$84K project); columbarium update (\$83K project); building and gateway upgrades (\$41K project)

JULY 2010 –
OCTOBER 2017

PASTOR, SAINTS PETER & PAUL CATHOLIC CHURCH

Shepherded parish of 1,000+ families

Increased engagement and revenue (Weekend regular collections increased from \$320K to \$850K annually)

Restored church's antique stained-glass windows (\$200K project)

Erected children's chapel (\$50K project)

Renovated HVAC systems in church, rectory (\$750K project)

Oversaw budget of \$2M

Supervised approximately 20 full- and part-time shared employees in addition to a rotating team of clergy and religious

SEPTEMBER 2014 –
OCTOBER 2017

ADMINISTRATOR, ST LAWRENCE CHURCH

Shepherded parish of 500+ families

Increased engagement and revenue

Replaced church roof (\$150K project)

Face lift to parish grounds

Oversaw budget of \$.5M

Supervised approximately 20 full- and part-time shared employees in addition to a rotating team of clergy and religious

TEACHING

2021 – PRESENT

ADJUNCT PROFESSOR, SACRED HEART UNIVERSITY

Offering courses in business and law

Engages students in advanced classes to understand the legal parameters of the business world

2015 – PRESENT

ADJUNCT PROFESSOR, STEVENS INSTITUTE OF TECHNOLOGY

Offering courses in business, law, and ethics

Engages students to recognize real world issues and respond

1992 – 2020

ADJUNCT PROFESSOR, SETON HALL UNIVERSITY

Offering courses in business, law, ethics, and religious

Engages students to learn course materials and apply to everyday life

SKILLS

INDUSTRY KNOWLEDGE

Higher Education, Budgeting,
Financial and Cash Flow Management,
Event Planning, Research,
Adult Education, Editing,
Grant Writing, Non-profits, Religion,
Curriculum Development,
Curriculum Design, Social Media,
Mediator, International Relations,
Staffing Services

INTERPERSONAL SKILLS

Public Speaking, Fundraising,
Leadership Development,
Staff Development,
Leadership, Career Counseling,
Community Development,
Team Management

TECHNICAL SKILLS

Microsoft Word
Microsoft PowerPoint

LANGUAGES

Spanish, Conversational
Italian, Conversational
French, Conversational

INTERESTS

Reading
Biographies
Traveling

SERVICE

2017 - PRESENT

CHAPLAIN, SUMMIT FIRE DEPARTMENT & SUMMIT POLICE DEPARTMENT

Provides spiritual support for members of the public and professional staff
Organizes prayer and memorial services
Contributes to community public safety discussions

2021 - PRESENT

BOARD OF TRUSTEES, ST ELIZABETH UNIVERSITY

Serves on the Development and Marketing Committee

2020-2023

CHAIR, PRESBYTERAL COUNCIL, ARCHDIOCESE OF NEWARK

Elected leader of more than 500 presbyters in reviewing and shaping policy for the Archdiocese of Newark

2013 - 2021

BOARD OF TRUSTEES, SACRED HEART UNIVERSITY

Develops and approves the university's strategies and budget, in accordance with the school's mission
Serves on Student Affairs and Academic Affairs Committees

2012 - 2014

CHAIRMAN OF THE BOARD, CAREPOINT HEALTH FOUNDATION

Developed and approved plans for the nonprofit that is dedicated to improving healthcare access to those in Hudson County

2015 - 2017

MEMBER OF BOARD OF DIRECTORS, HUDSON CATHOLIC HIGH SCHOOL

Developed and approved the high school's strategies and budget, in accordance with the school's mission

2011-2017

CHAPLAIN, HUDSON COUNTY SHERIFF'S OFFICE, HOBOKEN FIRE DEPARTMENT, HOBOKEN POLICE DEPARTMENT & HOBOKEN AMBULANCE VOLUNTEER CORPS

Provided spiritual support for members of the public and professional staff
Organized prayer and memorial services
Contributed to community public safety discussions

2012-2014

CHAIRMAN, REBUILD HOBOKEN RELIEF FUND

Organized donation efforts and provided spiritual assistance to help rebuild the city of Hoboken post Hurricane Sandy
Raised \$1M for devastation

BRIAN MORIARTY

Fort Lee, NJ 07024 | 917-548-6650 | bmoriarty@gmail.com | <http://www.linkedin.com/in/bmoriarty>

INNOVATION | INTELLIGENT SOLUTIONS | DATA VISUALIZATION | VISUAL DESIGN

- Versatile open source advocate with unique expertise that includes international project management for a top research institution and thought leadership in gesture/interface/adaptive learning technology.
- Expertise spans financial engineering, STEM educational technology, animation and integrated, inter-disciplinary, data-centric research and application.
- Excels in a hands-on leadership role; adapts to evolving requirements, and simultaneously motivates and mobilizes research/development teams to accelerates productivity throughout critical milestone project phases.
- PhD candidate in Systems Engineering and formal professional photographer with clients including *Fortune* and *Wired* magazines and placement in the permanent collections of the J. Paul Getty Museum, Parsons School of Design, and the Duke University Center for Documentary Studies.

Skills & Expertise

- Educational Content Platforms
- Research Design & Execution
- 2D/3D Imaging & Animation
- Next-Gen Technology Infrastructure
- Quantitative Analysis & Modeling
- User Experience (UX) Research
- Data Visualization

Career Milestones

- » **Exponentially increased research capacity** at Stevens Institute of Technology through leadership of cross-departmental initiative to fund, build and support research infrastructure; increased capacity to over 1000 users and a dozen active studies.
- » **Invited to manage implementation teams at Stevens, Deloitte and the University of Zurich on ACTUS**, an open-source financial engineering initiative to create an automated trading platform for financial contracts.
- » **Designed graduate-level coursework in data visualization theory/practice**, and provided strategic and tactical guidance to students in all aspects of GUI engineering and UX optimization.
- » **Co-founded Proxemic Technologies to aggregate and guide research efforts** in Systems Engineering, Chemical Engineering and Physics for STEM role-playing games that provide compelling and effective learning platforms.

PROFESSIONAL EXPERIENCE

TWO SIGMA INVESTMENTS

NOVEMBER 2016-PRESENT

Manager, Strategic Planning and Operations, Security Organization

Report directly to the Chief Security Officer for strategic planning and project management for organization and prioritization of software development and support efforts for all security initiatives for the company.

Key Contributions

- » Coordinate with project leadership across the company to align development efforts.
- » Update developer workflows for communication, efficiency, and
- » Work with product management organization to align resourcing with organizational priorities.
- » Design data visualization infrastructure to enhance awareness and response to intellectual property and related proprietary practices.

PEARSON

SEPTEMBER 2014- OCTOBER 2016

Senior Software Product Manager, Personalized Learning and Analytics

Perform product and market research on next generation personalized learning experiences to drive the adaptive product development roadmap across an array of disciplines in the product portfolio; Drive development of products through the full product lifecycle from POC research to scalable product integration.

Key Contributions

- » Lead efforts on product development for significant business investments.
- » Develop product pipeline to align market requirements with long-term vision and strategy for personalized learning technologies.
- » Collaborate with Product Strategy team on build, buy, and partnership development and market research efforts.
- » Partner with Pearson's Advanced Computing and Data Science Laboratory to develop future personalized learning products based on learner analytics.
- » Deliver best in class natively designed and integrated scaled products globally with engineering partners.

JOHN R. WILEY AND SONS PUBLISHING

MARCH 2014 - SEPTEMBER 2014

Product Designer, Editorial

Managed design efforts for complete product lifecycle for digital courses in adaptive learning platforms.

Key Contributions

- » Provided recommendations to acquisitions team on build, buy, and partnership opportunities for higher education learning platforms.
- » Developed model for integration of adaptive learning technologies into learning platforms across an array of disciplines.
- » Conducted product research to deliver the most efficient and cost effective implementation methods for adaptive learning products.

STEVENS INSTITUTE OF TECHNOLOGY, Hoboken, NJ

2001 – 2014

Teaching Assistant Professor, College of Arts & Lectures (2010 – 2014)**Adjunct Professor, School of Systems and Enterprises – Financial Engineering (2012-Present)**

Perform advanced educational technology and gamification research and serve as faculty advisor for Stevens' Center for Healthcare Innovation. Develop course materials in data visualization, digital imaging, animation, and financial engineering and participate in setting the strategic vision for the College and the department.

Key Contributions

- » **Tapped to lead multi-site ACTUS project** with concurrent phases on three continents, and managed integration, milestone reporting and presentation for Phase II that successfully secured funding for next steps. Java/OpenGamma platform provides risk analysis and automated processing of equity/fixed income transactions.
- » **Secured a \$50,000 grant to develop Stevens' motion capture laboratory**; worked closely with Leap Motion executives and Microsoft partners in enhancement and utilization of gesture/interface technology.
- » **Advised systems architecture as part of collaborative development effort with Lockheed Martin** for Systems Engineering Research Center and the Smart Cities project.
- » **Created Stereo 3D certification program with Panasonic**, as well as web programming courses in HTML 5, CSS 3, Javascript, MySQL and PHP, and a summer research program for Visual Arts and Technology at Stevens.
- » **Course development highlights include:** Fundamentals of Information Visualization, Interactive Web Programming, Digital Imaging 1/2/3, Video 1/2 Animation 1/2/3, Principles of 2D Design, 3D Form and Design, Interactive Installations, Data Visualization Applications, Data Visualization Programming for Financial Applications, Data Products Development (in progress).

STEVENS INSTITUTE OF TECHNOLOGY, Hoboken, NJ

Systems Manager (2008 – 2011); Adjunct Professor, College of Arts and Letters (2009 – 2010)

Stepped in during transitional period for the College and provided administrative and curriculum leadership as Acting Director; accountable for systems management and extensive needs analysis/infrastructure planning efforts with leaders institution-wide.

Key Contributions

- » **Designed and deployed a high-density computation system** for the High Accuracy Computational Chemistry Group and created a flexible, responsible system architecture for Systems Engineering Visualization, Modeling, and Computation Group.

- » **Renovated and innovated the Visual Arts & Technology Curriculum** to align student focus with industry opportunities; initiated a paradigm shift towards comprehensive business/technical acumen, interdisciplinary research, corporate partnerships, and entrepreneurship.
- » **Consulted with colleagues at various stages of research planning** to recommend infrastructure, technology, and strategic sourcing options as best-fit options to meet complex current-state and projected needs.

System Administrator (2001 – 2008)

Recruited in an Assistant capacity and rapidly assumed leadership of a campus-wide initiative to increase capacity, availability and responsiveness of the research infrastructure.

Key Contributions

- » **Expanded the program from two to 60 researchers users** and from only one active lab to 12 sites in multiple academic disciplines.
- » **Led grant writing and fund allocation that paved the way for significant network and server upgrades** including a cluster-based server architecture and 60 TB of SAN storage.
- » **Initiated and secured executive sanction/sponsorship for Stevens' first true researched-based IT group** to sustain and expand funded research.

EDUCATION

STEVENS INSTITUTE OF TECHNOLOGY, Hoboken, NJ – School of Systems and Enterprises

Ph.D. Candidate, Systems Engineering

YALE UNIVERSITY, New Haven, CT – School of Art and Architecture (1996)

M.F.A., Photography

NEW YORK UNIVERSITY, New York, NY – Tisch School of the Arts (1994)

B.F.A., Photography

RECENT PUBLICATION & PRESENTATIONS

Moriarty, B.; Lennon, E. *Development of Natural-Gesture, Game-Based Environments for Mathematics and STEM Education*, World Engineering Education Forum, Cartagena, Colombia, 2013

Moriarty, B.; Lennon, E.; DiCola, F.; Buzby, K.; Manzella, M.; Hromada, E. *Utilizing Depth Based Sensors and Customizable Software Frameworks for Experiential Application*, Complex Adaptive Systems, Washington, D.C., 2012

Moriarty, B.; Amaba, C.; Moy, Z. *Utilizing Explorable Visual Environments for Experiential Applications*, Conference on Systems Engineering Research, St. Louis, MO, 2012

TECHNICAL PROFILE

IT SOFTWARE ARCHITECTURE: Apache, LDAP + Kerberos, Solaris OS +zfs, Unix/Linux/Mac OS

VIDEO: Non-Linear Editing including Final Cut Pro, Grass Valley Edius; S3D including Panasonic Z10K cameras

VISUALIZATION: Curricular development, Processing Development Environment, d3.js, Gephi, ArcGIS, R Programming, Tableau

WEB PROGRAMMING: Curricular development, HTML5, CSS 3, Javascript, jQuery, JSON

BRIAN MUELLER

Westfield, NJ | 908-803-6948 | [linkedin.com/in/MuellerB90](https://www.linkedin.com/in/MuellerB90) | [@BrianMueller90](https://twitter.com/BrianMueller90) | MuellerB90@gmail.com

DATA ANALYTICS, RISK, OPERATIONS, ENGINEERING

A strategic and innovative leader with proven capabilities in the management and utilization of data and technologies in support of critical business needs. This expertise includes data engineering solutions, data operations and provisioning, the use of data to support decision and risk, data analytics for insight, and the leadership of teams in supporting end-to-end management of data.

Strong experience in focused in the area of relationship management, alliance building and the use of persuasive presentations to drive success.

AREAS OF EXPERTISE

Data Management | Team Leadership | Data Warehouse | Data Acquisition and Consumption | AI/ML | Analytics & Visualization Insight | Operations | Governance | Agile | Cloud | Vendor Management

ACCOMPLISHMENTS

- **Data Engineering, Operations, and Applying Data for Purpose:** Led the transformation and the team responsible for modernization of the data ecosystem to support the growth of data ingestion and consumption within the enterprise. This was a multi-phase program to build out a data hub for the dissemination of data to downstream systems, the modernization of the data warehouse to effectively handle the aggregation and availability of data for intelligence purposes, the rationalization of business intelligence to support self-service reporting and the introduction of ETL technology to handle increased growth and synthesis of internal data and data from third party providers and customers. The transformation was built in a partnership across IT and business stakeholders while maintaining a tight communication loop to ensure that the needs of the business were foremost in focus during this endeavor. The result of this effort is a 47% reduction in warehouse batch processing time, a 100% increase in growth of data coming in to the environment with an alignment to data quality and a higher degree of predictability of handling new customers by using operations data and predictive and prescriptive modeling.
- **Analytics Evangelization:** Revamped the entire analytics and BI/reporting process for the sales by improving the quality of deliverable, repurposing and re-processing the delivery method, integrating reporting abilities across multiple systems. This work involved re-building the team with a managed services vendor implementation and investing in technology to allow for self-service solutions of analytics tools, expeditious data engineering and consumption, visualization tools, and on demand mining of product, claims experience and financial related data. The area had been delivering a total of 500 annual reports to the business; however the timeliness, quality and technical maturity of the reports was lacking. With the investments made, the team now delivers ~1700 reports annually outside of the reports that have been turned in to self-service capable. This strategy was developed by building stronger relations with the business community, understanding and listening to their needs, and executing a strategy that was built to suit the requests of the stakeholders and business.
- **Leadership and Team Transformation:** Provided leadership and guidance to the core team to allow for a growth transformation experience. Utilized leadership principles of leadership by example, thinking with discipline, affiliative management style for the inheritance of new technology, and fostered a culture of transparency and accountability for the team. The teams I have worked with have recognized the difference I have made by the open-ness and honesty I bring. The team grew in size from an initial set of 13 to 75 individuals. I am happy to share my leadership feedback surveys to prove my credibility and character in this area. I take leadership and character for more than just words; words together with actions matter. Trusted member of the leadership team, influencing focus on core data management competencies. Acknowledged for solid leadership skills, instilling confidence and building and strengthening relationships across the spectrum.

PROFESSIONAL EXPERIENCE

Verstandnis Analytics Corporation

2020 - Present

Sr. Principal and Founder

Provide services to clients relative to data analytics, risk management utilities and tools, data visualization, and analytics. These services provide clients with business solutions relative to risk and decision making, geo-spatial visualization, analytics solutions, NLP processing and technology implementation.

Customers currently include those in the transportation, military, law enforcement, education and real-estate.

- Risk Based Modeling services utilizing data, and modeling
- Econometric modeling to detail ROI of particular investments
- Geo-Spatial visualization for determining patterns in auto-theft
- Implementation and oversight of projects to implement transportation efficiencies

Prudential Financial, Newark, New Jersey

2012 - 2020

Director –Operations, Engineering, Analytics

Overall owner of the global big data, analytics and business intelligence reporting function for the \$3B Group Insurance business of Prudential; providing the vision, leadership and management of all cross-functional efforts and projects to deliver impactful data-driven insights to internal and external stakeholders.

- Partnered across business and technology to deliver strategic initiatives and analytics relative to business needs. This included working with sales associates and directly with clients to provide insights at the client level and/or across the macro-view of products and multi-dimensional sales views. These solutions range from the gathering of data to support cross-sell and up-sell opportunities, to the building of technology solutions that use data to support crime enforcement, the development of analytical tools to gain insights from historical and descriptive and prescriptive information as well as yielding insights on predictive modeling and clustering.
- Developed a process for the client data management team to synthesize data and proactively assess the quality of the data coming in to the environment. This effort used ETL technologies to segregate and identify varying data files and their associated formats and determine the adherence to data file formats. The effort allowed the client data management team to handle growth of clients and more effectively onboard clients to meet critical deadlines.
- Responsible for the management of vendors and vendor agreements for the organization. This focus was on the negotiation and renegotiation of contracts, the management of the managed services vendor contracts and the review of SLAs associated with the contracts.
- Applied supervised machine learning techniques by analyzing feature vectors to identify ingested data and make determinations as to what product the data represents. This effort led to improvements in the ability of the operations teams to proactively onboard clients and reduced governance related issues by 35%.
- Utilized big-data technologies and systems for the enablement of data, analytics and business intelligence across the organization. Oversaw the implementation of client data ingestion solutions using HDFS and SQOOP to ingest client data,, store and analyze the data and feed it to downstream RDBMS systems. This solution has reduced the onboarding time for clients.

Medco Health Solutions, Franklin Lakes, New Jersey

2011 - 2012

Director - Client Benefit Administration

Led the development activities for a corporate wide effort to modify the Medco Client Benefit Administration system using Java and Pega based business process management technology. Supported the solicitation and administration of client benefits and to allowed for a more seamless integration across technical and business processes.

- Led and managed several teams of business analysts, developers and testers tasked with the definition of technologies and frameworks to meet the needs of the business process champions. Project used an Agile/SCRUM methodology for delivery, consisted of 65+ resources across 5 scrum teams each charged with delivering functional and business value.

JPMorgan/Chase, Jersey City, NJ**2010-2011****Vice President –Program/Project Manager Treasury**

Managed a program of critical projects that were implemented to transform data from a wide range of disparate treasury bond systems into a unified JPMorgan's system. This involved a team of technical subject matter experts responsible for a largescale data conversion from legacy applications to a newly developed portal-based application.

Chubb Specialty Insurance, Warren, New Jersey**2008-2010****Senior Technical Project Manager – Predictive Modeling**

Led a project team consisting of technical development, third-party vendors and geo-dispersed project team members to introduce new predictive modeling program. These projects served to implement and deliver a predictive modeling solution using a service-oriented architecture with integration to credit reporting agencies using vendor partners (Accenture, Dun & Bradstreet, Moody's, Experian, FICO). This program involved the management of a multi-year budget of \$35M with geo-dispersed development and quality assurance teams. Partnered with third-party vendors to oversee the integration of the solution with credit rating bureaus provide information around clients and credit ratings.

- Partnered with third-party vendors to oversee the integration of the solution with credit rating bureaus provide information around clients and credit ratings.
- Successfully delivered a predictive modeling program. This program involved partnerships across multiple vendors to define and deliver a scoring engine to be used by Chubb Specialty Insurance.

AT&T Bell Laboratories, Murray Hill, New Jersey**Distinguished Member of Technical Staff - Bell Laboratories Business Modeling**

A Distinguished Member of Technical Staff with AT&T Bell Laboratories; responsibilities included development and integration of the UNIX Operation System and the building of predictive and econometric models and ERP systems.

- Member of Bell Labs Business Modeling team. This team developed decision support models and tools to be used by the sales teams to demonstrate scenarios to customers. These scenarios ranged from the use of selling text capabilities, to building business models that demonstrated profit and loss.
- Developed business econometric models that considered multi-variate decision making for telephony based clients. These models were developed to offer providers the ability to understand options for price bundled offerings and market basket analysis.
- Managed the analysis and development of Decision Support models to be used by sales representatives in the field. These models were meant to provide information about the potential sales volume and pricing relative to products such as texting, ring tones and/or subscription volume.

TECHNOLOGY STACK/SKILLS CHECKLIST

AI/ML: Classification, Decision Tree, Neural Networks, SVM, regression, clustering, KNN, predictive modeling, Bayesian techniques

Programming Languages/Scripting: Python, SciPy, NumPy, pandas, NLTK, NLP, AWK, Shell, Perl Java, JavaScript, C, C++, SAS, DB2, Oracle

Visualization, Insights, Storytelling: Tableau, ESRI, ArcSoft, Excel, Power BI, Python

Data Science Toolkit: Python, R, WordJ, KNIME, NLTK, Tableau, Multivariable Calculus, Linear Algebra, Data Wrangling, Data Visualization, Visual Encoding, Data Presentation, Visualization, Data Inferences, Supervised/Unsupervised Learning, Hadoop, ETL, Risk Modeling, AWS Cloud CCP, Data Warehouse, Data Hub

Environments and Technologies: UNIX, Windows, Hadoop, Informatica, Attunity, SAP, Cognos

IDE-Environments and Technologies: Anaconda, R-Studio, Eclipse

Statistics/Mathematics: Descriptive and Inferential Statistics, Multivariable Calculus, Linear Algebra, Multi-Attribute modeling, Multi-Object modeling, Sensitivity Analysis

Management and Business Intelligence Software: MS Office, COGNOS, SAP, Business Objects, Tableau, SAS, SPSS, @RISK

VOLUNTEER, CERTIFICATIONS, AWARDS

Vice President of Innovation - Association of the United States Army (www.ausa.org) –First Region – Vice President of Innovation and Treasurer for the First Region of AUSA. This region comprises 10 northeastern states

from Maine through Maryland with over 17,000 members. AUSA is a non-profit professional development organization supporting America's Army.

2020 – Citation awarded by Association the United States Army for Exceptional Service in Support of National Defense

2019 – Certificate in Data Analytics, Visualization for Risk and Decision Making, Stevens Institute of Technology

2000 – NJ Meritorious Service Medal – Awarded by the Adjutant General of the State of New Jersey for Service to Veterans

EDUCATION | LEADERSHIP DEVELOPMENT

Master's Certificate - Data Analytics and Visualization for Risk and Decision-Making, **Stevens Institute of Technology**

MBA - Master of Business Administration – Management Science, **Rutgers Business School**

MS - Master of Science - Computer Science, **Stevens Institute of Technology**

BS – Bachelor of Science - **St. Peter's College**

Korn Ferry Leadership Program

Adjunct Professor – Big Data Technologies

Teaching Experience

Computer Fundamentals – introductory undergraduate level course with an intro to computer hardware and software, software design and development, programming and fundamentals.

Introduction to Computers with Python – introductory undergraduate level course to students who have been exposed to computers but are desiring to understand software development. This course utilizes python to provide an introduction to programming. The students are assigned several programming assignments as well as homework and exams relative to software developments using foundational constructs.

Leadership - introductory course taught to secondary and post-secondary students that deals with managing your career and navigating organizations. This course is intended to provide information to those who are new to the workforce; it provides insight on how to excel in career planning, build character and leadership skills, gain recognition within an organization and diminish the skills-gap that exists for new entrants in to the workforce.

Mohammad Nikouei

mohammad.nikouei@gmail.com • (201) 234-9363 • Hoboken, NJ, Github

Experience

Dun and Bradstreet

Florham Park, NJ

Generative AI Tech Lead

Jun '20 – present

Leading 10 data scientists and data engineers in various GenAI efforts:

- Leading the architecture design and validation for D&B.AI Lab: tech and data requirements, workflow and dataflow pipelines and user interface.
- Building AI Agents using Langchain and, open source and proprietary LLMs to connect to REST APIs, SQL databases and repository of documents as backend for ChatDnB.
- Designing and Building D&B's first evaluation framework for consistency checking and regression testing for bots built internally and by strategic (IBM, Google, Microsoft) partners.
- Leading the tech and data science teams to create first Chat with D&B Data live demo for internal use.
- Leading the design and preparation of specifications for chatbots created by Google in Vertex AI and IBM in WatsonX for DB.
- Leading the design and implementation of RAG solution with and without similarity search.
- Designing and implementing a web scraping capability that leverages the power of LLMs to discover and extract relevant information.

Stevens Institute of Technology

Hoboken, NJ

Adjunct Faculty

Jan 2021 – Present

Teaching at Business School's Department of Business Intelligence and Analytics:

- BIA 810 - Developing Business Applications Using GenAI: A brief intro to GenAI for BIA and CS students.
- BIA 679 - Big Data Practicum: Managing teams of students on design and implementation of Big Data pipelines for a variety of different problems.
- BIA 678 - Big Data Technologies: Introducing a collection of big data tools such as Hadoop and Spark with emphasis on distributed execution on cloud infrastructures such as AWS and Databricks.
- MIS 637 - Data Analytics and Machine Learning: A combination of theory and application for future data scientists.
- MIS 634 - Business Intelligence & Data Integration - LAB: Hands on experience for data modeling and data analysis.

Publicis Spine

New York, NY

Full Stack Data Scientist

Jan '19 – Jun '20

- Designed, implemented and managed product data science framework (DSF) for distributed computation on AWS EMR clusters using Apache Spark
- Used clustering techniques like K-Means clustering for lookalike and recommendation algorithms as part of DSF
- Used classification techniques like random forest to model advertising audience's propensity toward different advertised products as part of DSF
- Packaged DSF code-base into a SDK for use of clients' data science teams
- Worked on existing NLP algorithms in Apache Spark to extract insight and statistics hidden in data as part of DSF
- Tuned Apache Spark configs for DFS jobs for optimized use of resources provided by AWS EMR clusters

Stevens Institute of Technology
Research and Teaching Assistant

Hoboken, NJ
Sep '13 – Dec '18

- Developed the theory of relational program logic for comparing two programs together
 - Developed WhyRel, a tool for verification of software equivalence
 - Designed a Java-like language
 - Designed a greedy method of program weaving
 - Developed compilers for the new language using OCaml in functinal paradigm
 - Created a subset of WhyML for use in the compilers
-

Publications

Computer Science:

- Mohammad Nikouei, Anindya Banerjee, and David A. Naumann. Data abstraction and relational program logic. arXiv, 1910.14560, (2019)
- A. Banerjee and D. Naumann and M. Nikouei, A Logical Analysis of Framing for Specifications with Pure Method Calls, TOPLAS, (2018)
- A. Banerjee and D. Naumann and M. Nikouei, Relational Logic with Framing and Hypotheses, FSTTCS, (2016)

Mathematics:

- S. Azam and M. Nikouei, Classification of extended affine root systems (A combinatorial approach)
 - S. Azam and M. Nikouei, A Length Function for Weyl Groups of extended affine root systems of Type A_1 , Algebra Colloquium, (2015)
 - S. Azam and M. Nikouei, Weyl Groups Associated with Affine Reflection Systems of Type A_1 (Coxeter Type Defining Relations), Publications of the Research Institute for Mathematical Sciences, Kyoto University, (2013)
-

Education

Stevens Institute of Technology

HOBOKEN, NJ

PhD, Computer Science: Logical Analysis

Thesis title: A Logical Analysis of Relational Program Correctness

Select Courses: Data mining in Telecommunication, Knowledge Discovery in Databases, Programming Languages

University of Isfahan

ISFAHAN, IRAN

PhD, Pure Mathematics: Lie Algebras

Thesis title: The Geometry of Affine Reflection Systems

Select Courses: Advanced Statistics, Stochastic Process Analysis, Monte-Carlo Simulations

University of Isfahan

ISFAHAN, IRAN

Master of Science, Pure Mathematics: Lie Algebras

Thesis title: Vertex operator algebras and their modules

First honor

University of Isfahan

ISFAHAN, IRAN

Bachelor of Science, Pure Mathematics

Select Course: Mathematical Probability Theory, Time Series Analysis

Tools

Languages: Python, Java

Generative AI: Langchain, OpenAI API, Vertex AI API, WatsonX.AI, Transformers API, Fastchat API

Data Mining and Machine Learning Platforms: Spark, Pandas, Pytorch, Huggingface API

Cloud Platforms: GCP, WatsonX, Databricks, AWS

Alexandros Panayides, Professor and Chair
Department of Economics, Finance and Global Business
William Paterson University
1600 Valley Rd, Wayne, NJ 07474
Tel: 9737202962, Fax: 9737203721
E-mail: panayidesa@wpunj.edu

Education

- | | |
|-------------------------|--|
| 2000 - PhD Economics | State University of New York at Binghamton
Dissertation: "Telecommunication Improvements and Urban Development" |
| 1996 - M.A. Economics | State University of New York at Buffalo |
| 1993 - M.S. Mathematics | Johann Wolfgang Goethe University of Frankfurt on Main, Germany
Thesis: "Metric Simplicial Complexes with Non-Positive Curvature" |

Academic Experience

- | | |
|--------------|--|
| 2011-present | Professor, Department of Economics, Finance & Global Business, Cotsakos College of Business, William Paterson University |
| 2007-2011 | Associate Professor, Department of Economics, Finance & Global Business, Cotsakos College of Business, William Paterson University |
| 2006-present | Chair, Department of Economics, Finance & Global Business, Cotsakos College of Business, William Paterson University |
| 2005-2006 | Interim Chair, Department of Economics, Finance & Global Business, Cotsakos College of Business, William Paterson University |
| 2001-2006 | Assistant Professor, Department of Economics, Finance & Global Business, Cotsakos College of Business, William Paterson University |
| 2000-2001 | Visiting Assistant Professor, Department of Economics & Finance, Monmouth University |

1997-2000 Lecturer, Department of Economics, Binghamton University, Binghamton, NY

1999-2000 Lecturer, School of Business & Department of Economics, Ithaca College

Industry Experience

2003-2007 Cablevision
Consultant Responsibilities: Strategy planning to increase advertising

Peer Reviewed Journal Articles

1. Alexandros Panayides, Giuliana Campanelli Andreopoulos and Susanna Tardi. 2018. "The Rise of Contingent Faculty in the US System of Higher Education." *Journal of International Management Studies*, Vol. 18 (3): 63-69.
2. Alexandros Panayides, Bader Almazur, Augustine Arize, Giuliana Campanelli Andreopoulos, and John Malindretos. 2018. "The Reasons and Evaluations of Mergers and Acquisitions." *Accounting and Finance Research*, Vol. 7 (3): 211-220.
3. Alexandros Panayides, Augustine Arize, Ioannis Kallianiotis, John Malindretos and Demetri Tsanacas. 2018. "A Comparison of the Current Account and the Monetary Theories of Exchange Rate Determination." *International Journal of Economics and Finance*, Vol. 10 (2): 102-107.
4. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2017. "Jobs on Demand: The New Frontier of the US Labor Market." *International Journal of Business Strategy*, Vol. 17 (3): 41-46.
5. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2017. "Pollution and Cancer Mortality: The Case of New Jersey." *Review of Business Research*, Vol. 17 (3): 60-65.
6. Alexandros Panayides, George Andreopoulos and Giuliana Campanelli Andreopoulos. 2017. "Surrogacy in the US: The Role of Military Wives." *Journal of International Finance and Economics*, Vol. 17 (1): 51-56.
7. Alexandros Panayides, Augustine Arize, Dipasri Ghosh, Krishna Kasibhatla, and John Malindretos. 2015. "Asymmetric and Nonlinear Exchange Risk Effect on Export Growth: A Nonlinear ARDL." *The International Journal of Economics and Finance*, Vol. 27 (2): 277-302.

8. Alexandros Panayides, Augustine Arize, Charles Berendt, Ioannis Kallianiotis, and John Malindretos. 2015. "Time Series Prognostication Models Applied to the US Dollar and the Japanese Yen." *The International Journal of Finance*, Vol. 27 (4): 502-516.
9. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos and Taghi Ramin. 2015. "The Market for Kidneys: Is the Iranian Model a Viable Alternative?" *International Journal of Business Strategy*, Vol. 15(3): 83-87.
10. Alexandros Panayides, George Andreopoulos and Giuliana Campanelli Andreopoulos. 2015. "The Black Market for Kidneys: Assessing the Challenges." *International Journal of Economics and Social Science*, Vol. 5 (Spring 2015): 105-110.
11. Alexandros Panayides, Augustine Arize, Ioannis Kallianiotis, Krishna Kasibhatla, and John Malindretos. 2014. "Interrelationship of Key Worldwide Money Market Interest Rates: An Econometric Study of the United States." *The Journal Of Business and Economic Studies*, Vol. 20 (2): 21-30.
12. Alexandros Panayides, Augustine Arize, Paraskevas Bakarezos, Krishna Kasibhatla, and John Malindretos. 2014. "The GINI Coefficient. Decomposition and Overlapping." *Journal of Advanced Studies in Finance*, Vol. V 1(9): 47-55.
13. Alexandros Panayides, Augustine Arize, Ioannis Kallianiotis, Scott Liu, and John Malindretos. 2014. "National Debt and Its Effects on Several Other Variables: An Econometric Study of the United States." *International Journal of Financial Research*, Vol. 5 (4): 98-113.
14. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2014. "The Presidency and the Debt." *Journal of International Finance and Economics*, Vol. 14 (4):153-158.
15. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2014. "Understanding the Complexities of the Supply Chain's Linkages: The Case of Anti-Malaria Drugs in Africa." *Journal of Academy of Business and Economics*, Vol. 4 (4):119-124.
16. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2013. "The Large and Opaque Networks of the Anti-Malaria Drug Supply Chain." *Review in Business Research*, Vol. 13 (4): 141-148.
17. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2013. "The Role of Developing Countries in the Prescription Drug Market." *Journal of International Management Studies*, Vol. 13 (1): 75-82.
18. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2012. "A Long Term Approach of Bilateral Aid: The Case of Germany." *Research in Business and Economics Journal*, Vol. 7: 1-8.

19. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2011. "US Foreign Assistance and the Changing Aid Architecture." *European Journal of Management*, Vol. 11 (4): 110-116.
20. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2011. "Multilateral vs. Bilateral Aid: Addressing Some Puzzles." *European Journal of Management*, Vol. 11 (4): 73-78
21. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos, and Eliza Durzynska. 2010. "Bilateral Aid: A True Instrument of Development? The Case of the United States." *Journal of International Management Studies*, Vol. 10 (4): 106-111
22. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2010. "Teaching Microeconomic Principles: Does Student Quality Play a Role?" *Review of Business Research*, Vol. 10 (4): 126-131
23. Alexandros Panayides. 2010. "The Correlation Between Improvements in Telecommunications Technology and Growth of Cities." *International Journal of Management & Information Systems*, Vol. 14 (2): 85-91
24. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2010. "Does Student Quality Matter in the Teaching of Economic Principles?" *American Journal of Business Education*, Vol. 3 (5): 81-85
25. Alexandros Panayides, Uros Andrejevic, and Giuliana Campanelli Andreopoulos. 2009. "Are Tariffs Higher on Necessities or Luxuries? The Paradoxical Case of the US Economy" *Review of Business Research*, Vol. 9 (4): 107-112
26. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2009. "The Regulation of Corporate Activities Under the International Human Rights Covenants." *European Journal of Management*, Vol. 9 (4): 96-101
27. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2009. "Teaching Economics to the Best Undergraduates: What are the Problems?" *American Journal of Business Education*, Vol. 32 (6): 117-121
28. Alexandros Panayides, Giuliana Campanelli Andreopoulos, Eliana Antoniou, and Evros Vassiliou. 2009. "The Impact of Employment and Physical Activity on Academic Performance." *College Teaching Methods & Styles Journal*, Vol. 4 (10): 17-21
29. Alexandros Panayides, Uros Andrejevic, and Giuliana Campanelli Andreopoulos. 2008. "The Double Discrimination of the US Tariff System." *Review of Business Research*, Vol. 8 (4): 127-133

30. Alexandros Panayides, Uros Andrejevic, and Giuliana Campanelli Andreopoulos. 2008. "Tariffs in Apparel and Footwear: A Gender Approach." *Journal of Diversity Management*, Vol. 3 (3): 1-6
31. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2008. "On the Responsibility of MNCs: Some Reflections." *International Business & Economics Research Journal*, Vol. 7 (6): 61-65
32. Alexandros Panayides, Eliana Antoniou, and Evros Vassiliou. 2008. "Cost of Biological Sciences Research: An Empirical Investigation." *International Journal of Business and Public Administration*, Vol. 5 (1): 141-147
33. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2008. "Teaching Economics to Undergraduates: What are the Problems?" *International Journal of Education Research*, Vol. 3 (1): 118-123
34. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2006. "Absorption Policies for South-South Migration." *Journal of Business and Economics Research*, Vol. 4 (11): 79-84
35. Alexandros Panayides, Uros Andrejevic, and Giuliana Campanelli Andreopoulos. 2006. "Tariffs on Necessities: Which Consumer Pays the Highest Bill?" *Journal of Academy of Business and Economics*, Vol. 6 (2): 37-42
36. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos, and Eliana Antoniou. 2006. "Economic Development and South-South Migration: A Two Stage Approach." *Journal of International Business and Economics*, Vol. 5 (1): 130-135
37. Alexandros Panayides, Jess Boronico, and Lori Goldstein. 2006. "A Mathematical Optimization Model to Support Decision Making for Fast Food Enterprises." *Journal of Applied Business Research*, Vol. 22 (1): 121-130
38. Alexandros Panayides and Clifford Kern. 2005. "Information Technology and the Future of Cities: An Alternative Analysis." *Urban Studies*, Vol. 42 (1): 163-167
39. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos, and Eliana Antoniou. 2005. "The Effects of South-South Migration on Economic Development and Its Security Implications." *International Business and Economics Research Journal*, Vol. 4 (7): 17-22
40. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2005. "Outsourcing: Who Gains in the Short Run?" *International Business and Economics Research Journal*, Vol. 4 (6): 1-6
41. Alexandros Panayides. 2004. "Do Advances in Technology Affect City Size? A Theoretical Investigation," *Journal of Business and Economic Studies*, Vol. 10 (1): 35-42

42. Alexandros Panayides. 2004. "The Effects of Improvements in Information Technology on Growth of Cities: A Model with Multiple Activities," *Journal of Business and Economics Research*, Vol. 2 (7): 7-10
43. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2004. "The Macroeconomics Effects of 9/11," *Journal of Business and Economics Research*, Vol. 2 (10): 51-54
44. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2004. "Is the Level of Development Significant for the Theory of Factor Price Equalization," *International Business and Economics Research Journal*, Vol. 3 (2): 85-89
45. Alexandros Panayides. 2002. "The Effects of Improvements in Information Technology on Growth of Cities: An Extension," *International Business and Economics Research Journal*, Vol. (11): 41-48
46. Alexandros Panayides and Jess Boronico. 2001. "The Joint Determination of Price, Quality and Capacity: An Application to Supermarket Operations." *Journal of Applied Mathematics and Decision Science*, Vol. 5 (3): 132-150

Book Chapters

Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2007. "Multinational Corporations." *Encyclopedia for Social Problems*, V. Parrillo (ed.), SAGE publications

Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2004. "Wages and Employment in Global Markets: Is the Stage of Development Important?" *Competitive Advantage: Contemporary Perspectives*, Jess Boronico

Peer Reviewed Proceedings

1. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2014. "Understanding the Complexities of the Supply Chain's Linkages: The Case of Anti-Malaria Drugs in Africa." *Proceedings of the International Conference of the Academic and Business Research Institute*
2. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2013. "The Counterfeit Drug Market: The Case of Malaria in Africa," *Proceedings of the Academy of Business and Public Administration Disciplines Conference*
3. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2012. "A Long Term Approach of Bilateral Aid: The Case of Germany," *Proceedings of the Academic and Business Research Institute Conference*

4. Alexandros Panayides. 2010. "The Correlation Between Improvements in Telecommunications Technology and Growth of Cities," *Proceedings of the International Applied Business Research Conference*
5. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2010. "Does Student Quality Matter in the Teaching of Economic Principles?" *Proceedings of the International College Teaching & Learning Conference*
6. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2009. "Teaching Economics to the Best Undergraduates: What are the Problems?" *Proceedings of the College Teaching & Learning Conference*
7. Alexandros Panayides, Giuliana Campanelli Andreopoulos, Eliana Antoniou, and Evros Vassiliou. 2008. "The Impact of Employment and Physical Activity on Academic Performance," *Proceedings of the College Teaching & Learning Conference*
8. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2008. "On the Responsibility of MNCs: Some Reflections," *Proceedings of Applied Business Research Conference*
9. Alexandros Panayides, Uros Andrejevic, and Giuliana Campanelli Andreopoulos. 2008. "Tariffs In Apparel and Footwear: A Gender Approach," *Proceedings of Applied Business Research Conference*
10. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2007. "What is Wrong With the Teaching of Introductory Economics?" *Proceedings of The International Academy of Business and Public Administration Disciplines Conference*
11. Alexandros Panayides, Eliana Antoniou, and Evros Vassiliou. 2007. "Analysis and Cost of Research Productivity in the Field of Biological Sciences," *Proceedings of The International Academy of Business and Public Administration Disciplines Conference*
12. Alexandros Panayides. 2006. "The Effects of Improvements in Information Technology on Growth of Cities: A Cobb-Douglas Payoff Function Approach," *Proceedings of Applied Business Research Conference*
13. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos, and Eliana Antoniou. 2006. "Economic Development and South-South Migration: A Two Stage Approach," *Proceedings of International Business and Economics Research Conference*
14. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2005. "Absorption Policies for South-South Migration," *Proceedings of International Business and Economics Research Conference*

15. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2005. "Outsourcing: Who Gains in the Short Run?" *Proceedings of International Applied Business Research Conference*
16. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos, and Eliana Antoniou. 2005. "The Effects of South-South Migration on Economic Development and Its Security Implications," *Proceedings of International Applied Business Research Conference*
17. Alexandros Panayides, Giuliana Campanelli Andreopoulos, and Eliana Antoniou. 2004. "Migration Within the Developing Countries," *Proceedings of Northeast Business and Economics Association Conference*
18. Alexandros Panayides. 2004. "The Effects of Improvements in Information Technology on Growth of Cities: A Model With Multiple Activities," *Proceedings of International Applied Business Research Conference*
19. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2004. "The Macroeconomic Effects of 9/11," *Proceedings of International Applied Business Research Conference*
20. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2003. "Is the Level of Development Significant for the Theory of Factor Price Equalization," *Proceedings of International Business and Economics Research Conference*
21. Alexandros Panayides. 2002. "The Effects of Improvements in Information Technology on Growth of Cities: An Extension," *Proceedings of International Applied Business Research Conference*
22. Alexandros Panayides. 2002. "The Effects of Improvements in Information Technology on Growth of Cities," *Proceedings of the American Society of Business and Behavioral Sciences Conference*

Peer Reviewed Invited Proceedings

1. Alexandros Panayides, Jess Boronico and Lori Goldstein. 2001. "Optimal Shutdown Policy: An Introduction to the Application of Optimization Procedures to Fast Food Franchises," *Proceedings of International Business and Economic Research Conference*

Peer Reviewed Paper Presentations

1. Alexandros Panayides, Augustine Arize, Ioannis Kallianiotis, John Malindretos and Moschos Scoullis. 2019. "A Critique of the Monetary Payments and International Payments." Northeast Decision Sciences Institute 2019 Annual Conference.

2. Alexandros Panayides, Augustine Arize, Ioannis Kallianiotis, John Malindretos and Dimitris Tsanacas. 2019. "Monetary Theories of Exchange Rate Determination: An Econometric Analysis of the Current Account." *Eastern Economic Association 2019 Annual Conference*.
3. Alexandros Panayides, Giuliana Campanelli Andreopoulos and Susanna Tardi. 2018. "The Rise of Contingent Faculty in the US System of Higher Education." *International Academy of Business and Economics Conference*.
4. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2017. "Jobs on Demand: The New Frontier of the US Labor Market." *International Academy of Business and Economics Conference*.
5. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2017. "Pollution and Cancer Mortality: The Case of New Jersey." *International Academy of Business and Economics Conference*.
6. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2017. "Surrogacy in the US: The Role of Military Wives." *International Academy of Business and Economics Conference*.
7. Alexandros Panayides, Arize Augustine, Brian Maruffi, Ioannis Kallianiotis and John Malindretos. 2015. "Several Econometric Tests of Exchange Rate Efficiency for a Few European Countries." *Academy of Business and Public Administration Disciplines Conference*.
8. Alexandros Panayides, Arize Augustine, Krishna Kasibhatla, John Malindretos and Moschos Scoullis. 2015. "The Interrelationship of Diverse Interest Rates: An Empirical View." *Academy of Business and Public Administration Disciplines Conference*.
9. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2015. "The Black Market for Kidneys: Assessing the Challenges." Mustang International Academic Conference.
10. Alexandros Panayides, Augustine Arize, John Malindretos, Krishna Kasibhatla, and Moschos Scoullis. 2015. "Determinants of Exports: An Econometric Study" *Eastern Economic Association Annual Conference*.
11. Alexandros Panayides, Augustine Arize, John Malindretos, Brian Maruffi, and Alfred Verrios, 2015. "Purchasing Power Parity: An Econometric Study." *Eastern Economic Association Annual Conference*.
12. Alexandros Panayides, Augustine Arize, Ioannis Kallianiotis, John Malindretos, and Moschos Scoullis. 2015. "Statistical Specification and Tests of Efficiency in Foreign Exchange Markets." *Northeast Decision Sciences Institute Annual Conference*.

13. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2014. "Understanding the Complexities of the Supply Chain's Linkages: The Case of Anti-Malaria Drugs in Africa." *International Academy of Business and Economics Conference*
14. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2014. "The Presidency and the Debt." *International Academy of Business and Economics Conference*
15. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2014. "Understanding the Complexities of the Supply Chain's Linkages: The Case of Anti-Malaria Drugs in Africa." *International Conference of the Academic and Business Research Institute*
16. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2013. "The Large and Opaque Networks of the Anti-Malaria Drug Supply Chain." *International Academy of Business and Economics Conference*
17. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2013. "The Counterfeit Drug Market: The Case of Malaria in Africa." *Academy of Business and Public Administration Disciplines Conference*
18. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2012. "The Role of Developing Countries in the Prescription Drug Market." *International Academy of Business and Economics Conference*
19. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2012. "A Long Term Approach of Bilateral Aid: The Case of Germany." *Academic and Business Research Institute Conference*
20. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2011. "Multilateral vs. Bilateral Aid: Addressing Some Puzzles." *International Academy of Business and Economics Conference*
21. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2011. "US Foreign Assistance and the Changing Aid Architecture." *International Academy of Business and Economics Conference*
22. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos, and Eliza Durzynska. 2010. "Bilateral Aid: A True Instrument of Development? The Case of the United States." *International Academy of Business and Economics Conference*
23. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2010. "Teaching Microeconomic Principles: Does Student Quality Play a Role?" *International Academy of Business and Economics Conference*

24. Alexandros Panayides. 2010. "The Correlation Between Improvements in Telecommunications Technology and Growth of Cities," *International Applied Business Research Conference*
25. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2010. "Does Student Quality Matter in the Teaching of Economic Principles?" *International College Teaching & Learning Conference*
26. Alexandros Panayides, Uros Andrejevic, and Giuliana Campanelli Andreopoulos. 2009. "Are Tariffs Higher on Necessities or Luxuries? The Paradoxical Case of the US Economy," *International Academy of Business and Economics Conference*
27. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2009. "The Regulation of Corporate Activities Under the International Human Rights Covenants," *International Academy of Business and Economics Conference*
28. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2009. "Teaching Economics to the Best Undergraduates: What are the Problems?" *College Teaching & Learning Conference*
29. Alexandros Panayides, Uros Andrejevic, and Giuliana Campanelli Andreopoulos. 2008. "The Double Discrimination of the US Tariff System," *International Academy of Business and Economics Conference*
30. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2008. "The Regulation of Corporate Activities Under Human Rights Treaties," *International Academy of Business and Economics Conference*
31. Alexandros Panayides, Giuliana Campanelli Andreopoulos, Eliana Antoniou, and Evros Vassiliou. 2008. "The Impact of Employment and Physical Activity on Academic Performance," *College Teaching & Learning Conference*
32. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2008. "On the Responsibility of MNCs: Some Reflections," *Applied Business Research Conference*
33. Alexandros Panayides, Uros Andrejevic, and Giuliana Campanelli Andreopoulos. 2008. "Tariffs In Apparel and Footwear: A Gender Approach," *Applied Business Research Conference*
34. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2007. "What is Wrong With the Teaching of Introductory Economics?" *The International Academy of Business and Public Administration Disciplines Conference*
35. Alexandros Panayides, Eliana Antoniou, and Evros Vassiliou. 2007. "Analysis and Cost of Research Productivity in the Field of Biological Sciences," *The International Academy of Business and Public Administration Disciplines Conference*

36. Alexandros Panayides, Uros Andrejevic, and Giuliana Campanelli Andreopoulos. 2006. "Tariffs on Necessities: Which Consumer Pays the Highest Bill?" *International Academy of Business and Economics Conference*
37. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos, and Eliana Antoniou. 2005. "Economic Development and South-South Migration: A Two Stage Approach," *International Academy of Business and Economics Conference, 2006 and International Business and Economics Research Conference*
38. Alexandros Panayides. 2006. "The Effects of Improvements in Information Technology on Growth of Cities: A Cobb-Douglas Payoff Function Approach," *Applied Business Research Conference*
39. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2005. "Absorption Policies for South-South Migration," *International Business and Economics Research Conference*
40. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2005. "Outsourcing: Who Gains in the Short Run?" *International Applied Business Research Conference*
41. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos, and Eliana Antoniou. 2005. "The Effects of South-South Migration on Economic Development and Its Security Implications," *International Applied Business Research Conference*
42. Alexandros Panayides, Giuliana Campanelli Andreopoulos, and Eliana Antoniou. 2004. "Migration Within the Developing Countries," *Northeast Business and Economics Association Conference*
43. Alexandros Panayides. 2004. "The Effects of Improvements in Information Technology on Growth of Cities: A Model With Multiple Activities," *Applied Business Research Conference*
44. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2004. "The Macroeconomic Effects of 9/11," *International Applied Business Research Conference*
45. Alexandros Panayides. 2004. "Using Basic Algebra and Differentiation to Make Economic Analysis Understandable," *Teaching and Learning Conference*
46. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2003. "Is the Level of Development Significant for the Theory of Factor Price Equalization," *International Business and Economics Research Conference*
47. Alexandros Panayides. 2003. "Aspects of the Gini Coefficient in the Case of Greece," *2nd International Conference on Banking and Finance: Issues and Strategies*

48. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2003. "Wages and Employment in Global Markets: Is the Stage of Development Important?" *Cotsakos College of Business Research Forums*
49. Alexandros Panayides. 2002. "The Effects of Improvements in Information Technology on Growth of Cities: An Extension," *International Applied Business Research Conference*
50. Alexandros Panayides. 2002. "The Effects of Improvements in Information Technology on Growth of Cities," *American Society of Business and Behavioral Sciences Conference*
51. Alexandros Panayides. 2001. "Information Technology and the Future of Cities: An Alternative Analysis," *Cotsakos College of Business Research Forums*

Peer Reviewed Invited Paper Presentations

1. Alexandros Panayides, Jess Boronico, and Lori Goldstein. 2001. "Optimal Shutdown Policy: An Introduction to the Application of Optimization Procedures to Fast Food Franchises," *International Business and Economic Research Conference*

Research Awards and Honors

1. Recognized by WPU for outstanding academic research 2001-2005
2. Alexandros Panayides, George Andreopoulos, and Giuliana Campanelli Andreopoulos. 2008. "On the Responsibility of MNCs: Some Reflections," The paper was selected as the best session paper at the *Applied Business Research Conference*
3. Alexandros Panayides, Uros Andrejevic, and Giuliana Campanelli Andreopoulos. 2008. "Tariffs In Apparel and Footwear: A Gender Approach," The paper was selected as the best session paper at the *Applied Business Research Conference*
4. Alexandros Panayides. 2006. "The Effects of Improvements in Information Technology on Growth of Cities: A Cobb-Douglas Payoff Function Approach," The paper was selected as the best session paper at the *Applied Business Research Conference*
5. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos, and Eliana Antoniou. 2006. "Economic Development and South-South Migration: A Two Stage Approach," The paper was selected as the best session paper at the *International Business and Economics Research Conference*
6. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos. 2005. "Absorption Policies for South-South Migration," The paper was selected as the best session paper at the *International Business and Economics Research Conference*

7. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2005. "Outsourcing: Who Gains in the Short Run?" The paper was selected as the best session paper at the *International Applied Business Research Conference*
8. Alexandros Panayides, George Andreopoulos, Giuliana Campanelli Andreopoulos, and Eliana Antoniou. 2005. "The Effects of South-South Migration on Economic Development and Its Security Implications," The paper was selected as the best session paper at the *International Applied Business Research Conference*
9. Alexandros Panayides. 2004. "The Effects of Improvements in Information Technology on Growth of Cities: A Model With Multiple Activities," The paper was selected as the best session paper at the *Applied Business Research Conference*
10. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2004. "The Macroeconomic Effects of 9/11," The paper was selected as the best session paper at the *International Applied Business Research Conference*
11. Alexandros Panayides and Giuliana Campanelli Andreopoulos. 2003. "Is the Level of Development Significant for the Theory of Factor Price Equalization," The paper was selected as the best session paper at the *International Business and Economics Research Conference*
12. Alexandros Panayides. 2002. "The Effects of Improvements in Information Technology on Growth of Cities: An Extension," The paper was selected as the best session paper at the *International Applied Business Research Conference*
13. Awarded Assigned Released Time for Research (ART) by William Paterson University for the academic years 2003-2011

Teaching Awards and Honors

1. Cotsakos College of Business Faculty Award for Teaching Excellence, William Paterson University, 2005
2. Cotsakos College of Business Faculty Award for Teaching Excellence, William Paterson University, 2002
3. Graduate Student Award for Excellence in Teaching, Binghamton University, 1999
4. Certificate in College Teaching, Binghamton University, 2000

Grants

1. Summer Research Grant, Cotsakos College of Business, William Paterson University, 2018
2. Summer Research Grant, Cotsakos College of Business, William Paterson University, 2017
3. Summer Research Grant, Cotsakos College of Business, William Paterson University, 2016
4. Summer Research Grant, Cotsakos College of Business, William Paterson University, 2006
5. Summer Research Grant, Cotsakos College of Business, William Paterson University, 2005
6. Summer Research Grant, Cotsakos College of Business, William Paterson University, 2004
7. Summer Research Grant, Cotsakos College of Business, William Paterson University, 2003
8. Summer Research Grant, Cotsakos College of Business, William Paterson University, 2002
9. Summer Research Grant, School of Business Administration, Monmouth University, 2001
10. Summer Research Grant, Grants-in-Aid-for-Productivity, Monmouth University, 2001

Curriculum and Program Development

1. BA in Economics program
2. Financial Planning concentration within the Business Administration program
3. BS in Finance
4. BS in Financial Planning
5. BS in Global Business
6. Finance concentration within the MBA program
7. MS in Finance and Financial Services
8. Developed and implemented various graduate and undergraduate courses

Teaching

Graduate: *Managerial Economics*
 Mathematical Methods for Business
 Mathematical Analysis for Economists
 International Economics

International Finance

Undergraduate: *Principles of Microeconomics*
Principles of Macroeconomics
Microeconomic Theory
Macroeconomic Theory
International Economics
International Finance
Managerial Economics
Business Mathematics
Mathematical Economics
Business Statistics
Money and Banking
Independent Study

Service

Professional Service

Referee: *Journal of Business and Economic Studies*
Management Research News
Reviewer: *Papers for conference proceedings*
Several textbooks
Chair: *Various conference sessions*
Discussant: *Various conference sessions*

University Service

Member: *University Chairs Council 2005-present*
UCC Committee 2010-present
Information Technology Advisory Committee 2002-present
Summer Session Ad Hoc Committee 2005-present
Sabbatical Leave Committee 2010
Range Adjustment Committee 2019
Advisement and Registration Senate Committee 2005-2008
Technology Across the Curriculum Committee 2001-2006
A contributor to the WPU Youth Program Spring and Summer 2010

College Service

Chair: *Research Support Committee 2008-present*
Research Grant Committee 2003-2008
Research Forum Committee 2003-2006
Working Paper Series Committee 2003-2006
Member: *Curriculum Committee 2001-present*
Mission Committee 2010-present
AACSB Maintenance Committee 2008-present

Research Forum Committee 2001-present
College of Business first Community Day 2007
120-Credit Task Force Fall 2009
Associate Dean Search Committee
Advisor: Practicum/Consulting project 2001-present
Participant: Annual Stakeholders Conference 2001-present
Finance Symposium 2001-2002
Author: Research faculty chapter in the "Self Evaluation Report" for the AACSB accreditation

Department of Economics, Finance and Global Business Service

Chair: Department of Economics, Finance & Global Business 2006-present
Interim Chair: Department of Economics, Finance & Global Business 2005-2006
Chair: Curriculum Committee 2001-present
Member: Various Search Committees
Finance Symposium Committee
Course Leader: Course leader for various economics and finance courses
Academic Advisor: All Economics, Finance, Financial Planning and Global Business Majors
Participant: Open Houses, Major/Minor Day, In Person Registration, etc.

Professional Affiliations

American Economic Association
The American Real Estate and Urban Economics Association
National Register's WHO'S WHO in Executives and Professionals (2006-2007 edition)
Kean University's Institutional Animal Use and Care Committee (IACUC)
AHEPA (American Hellenic Educational Progressive Association)

🐦: @Jiali_Maggie_Qi
✉: jq16@stevens.edu

School of Business, Stevens Institute of Technology
Hoboken, New Jersey, 07030

Jiali Qi

I investigate knowledge collaboration in online communities, with particular emphasis on structures, practices, and processes of artifacts design. I applied qualitative (e.g., interview, observation) and quantitative (e.g., survey) methods to understand community members' mental models and behavioral patterns.

Education

2018-2024
(Expected)

Ph.D. in Business Administration, Information Systems and Analytics Track
School of Business, Stevens Institute of Technology, NJ, USA

2015-2017

M.S. in Global Finance
Fordham University, NY, USA

2010-2014

B.A. in Economics, International Cultural Trade
Beijing International Studies University, Beijing, China

Publications & Presentations

WORKING PAPER

2023

Jiali Qi and Aron Lindberg. Digital Co-creation – How are the Efforts of Firm and User Integrated? A Knowledge Perspective.
Jiali Qi, Di Zhu and Aron Lindberg. Understanding How Does the Cognition of Agentic Artifacts among Firm and Community Members Co-evolve.

2019

Jiali Qi and Aron Lindberg. Understanding the Structure and Diffusion of Pseudo-knowledge in Social Media: A Practice Perspective.

PRESENTATIONS & WORKSHOPS

2021

Jiali Qi and Aron Lindberg. (2021). Understanding the Reactive Practices of Third-party Developers. Paper presented at the the 81st Annual Meeting of the Academy of Management - AOM'21.

2019

Ji Sui, **Jiali Qi** and Shuang Wu. (2019). Predicting Consumer Probability of Default: A Comparison of Four Models. Poster presented at School of Business Student Research Showcase at Stevens Institute of Technology.

BOOK CHAPTERS

- 2013 **Jiali Qi** (2013). A Report of Beijing and Foreign Copyright Trade. *Research Report of Beijing International Cultural Trade 2012 (ISBN7510308984)* - **pp 87-102**.
- Jiali Qi** (2013). A Case Study of China and Foreign Copyright Trade. *Study on the Selected Chinese Cases of Cultural Trade (ISBN7510309980)* - **pp 195-205**.
-

Research Experience

- 2018.8-present **Research Assistant, Stevens Institute of Technology**
- Collaborated with undergraduate Pinnacle Scholars over three summers, providing guidance and mentorship in their research endeavors, fostering their academic growth and cultivating their research skills.
 - Assisted Dr. Aron Lindberg (PI) in qualitative data collection. Conducted thorough transcriptions of key informant interviews and in-depth interviews.
- 2014.7-2014.9 **Research Intern, Credit Reference Center, People's Bank of China**
- Supported the research on credit reporting regulations through extensive literature reviews, acquiring an in-depth understanding of the field's current state of knowledge and identifying research gaps.
 - Authored comprehensive reports synthesizing diverse data sources, effectively conveying key findings and their implications.
- 2012.9-2013.6 **Research Assistant, National Institute of Cultural Development (NICD)**
- Contributed to the successful organization and preparation of the 7th and 8th International Service Trade Forums, actively participating in logistical arrangements, coordination of sessions, and ensuring smooth execution of the events.
 - Participated in the Strategic Reform of State-owned Academy of Performance Art research project, supported by The National Social Science Fund of China (Grant No. 11BG072). Responsibilities included conducting extensive literature reviews, gathering field data through participant observation and conducting in-depth interviews.
 - Demonstrated strong analytical skills by writing detailed analytic memos, effectively summarizing key insights from the collected data.
 - Actively contributed to the interpretation of research findings, collaborating with the research team to derive meaningful conclusions and implications.
-

Teaching Experience

- 2023 **Instructor**
- Acted as an instructor for two recitation sections of the undergraduate course **BT353R-Project Management**, delivering high-quality instruction that resulted in consistently positive student

feedback. Received a 5 out of 5 rating and received commendable evaluations from students.

2020-2022

Teaching Assistant

- Worked with Dr. Foad Mahdavi Pajouh on course development and grading for an MBA course: **MGT657-Operations Management**.
 - Worked with Dr. Aron Lindberg on grading for a graduate-level management information system course: **MIS699-Digital Innovation**.
 - Worked with Dr. Gaurav Sabnis to support class discussion, provide demonstration, and facilitate Q&A for three undergraduate-level business & technology courses: **BT417-Marketing Analytics & Research**, **BT435-Social Media & Network Analysis** and **BT403-Marketing Strategy in Digital World**, and an MBA course **BIA672-Marketing Analytics**.
-

Fellowships

2018-2024

Stevens Provost Doctoral Fellowship

2023

Swedish Center for Digital Innovation (SCDI) Fellowship

Frontiers in digital innovation research course, (off- and on-site at Riksgränsen, Sweden).

Services

CONFERENCE REVIEWER

2022

ICIS 2022, HICSS 2022

2021

ICIS 2021

2020

ICIS 2020, HICSS 2020, AMCIS 2020

2019

ICIS 2019

Student Activities

2022

Cornell University Winter Writing Boot Camp 2022, (Online).

2022

iJOBS Workshop 2022: SciPhD Leadership and Business Skills for Scientists, (Online).

2019

Stevens Institute of Technology Teaching at the College Level program, Hoboken.

2015-2016

Fordham University Chinese Students & Scholar Association, New York.

2013

International Youth Leadership Summit 2013, Hong Kong.

2012

Global Volunteer Program at Faith With Action Children's Organization (FWACO), Nairobi.

Memberships

2019-present

Association for Information Systems (AIS)

2021-present

Academy of Management (AOM)

Last updated: July 17, 2023

ANAND RAI

Basking Ridge, NJ 07920 ♦ 8454227999 ♦ arai2@stevens.edu

PROFESSIONAL SUMMARY

Experienced transformation leader with a passion for solving complex business challenges using AI, Big Data analytics, and emerging technologies. Proven ability to champion data-driven ideas, lead end-to-end development, and ensure cross-functional success. Strong analytical thinker known for root cause analysis, effective communication, and negotiation skills. Six Sigma Green Belt trained, skilled in Agile methodologies, and a self-starter with exceptional learning agility. Background in wireline, wireless telecommunications, IT, and Product.

KEY CAREER ACCOMPLISHMENTS

- Network Automation Analytics: Used the cell site router temperature as a proxy for the site temperature by adding intelligence and other data to create three use cases. All of which have a bearing on your OPEX.
- AI & Cloud computing: Implemented Network ThoughtSpot, Development of Virtual Assistant AI coach using GenAI, Led Poc's for Public Cloud for Verizon and Hackathon for Interns, Led AWS migration for application and database.
- Big Data COE initiative: Big data IT Transformation champion Role– Promoted Big Data and provided education to the organization. Worked within VP organizations to identify opportunities for leveraging Big Data and connected teams and SMEs to drive Big Data projects forward.

HONORS AND AWARDS

- Big Data COE IT Transformation
- Verizon Patent Award
- Innovation Award from Product Leadership
- Received several Spotlight Award

SKILLS

- Tableau, Qlik Sense, Python, Rapid Miner
- Agile framework
- Customer Journey Analytics.
- Automation
- GenAI, Big Data & Cloud (AWS, GCP)
- Cross-functional team leadership
- Learning Agility

WORK HISTORY

Adjunct Faculty, 01/2023 - Current

Stevens Institute of Technology

- Adjunct faculty at Stevens teaching Applied analytics solving complex business problems using data technology.

Principle Engineer, 04/2019 - Current

Verizon

- Spearheaded automation and network personalization in Network Operations, improving network transparency and customer experience
- Enhanced Wireless Echo Insights by integrating outage data with demographics, enabling better outage impact analysis

- Introduced self-serve analytics with ThoughtSpot and upgraded Outage Characterization Tool with new visualization technology
- Leading GenAI troubleshooting assistant development, integrating data for proactive troubleshooting and contributing to critical business use cases, served as Agile Product Owner for Network Big Data pipeline.

Manager-BI&A, 08/2016 - 04/2019

Verizon

- Contributed to improved decision-making and business strategies in the New Product and Business team, focusing on Customer Journey & Next Best Action insights for product acquisition, churn reduction, and 5G engagement
- Enhanced BI&A capabilities by implementing the first production Qlik Sense platform at Verizon with mobile app support
- Recognized as a go-to person for IT, data discovery, cross-functional leadership and building strong relationships with stakeholders
- Consistently delivered valuable analytics insights to product managers and stakeholders and conducted POCs for new tools like ThoughtSpot, and Narrative Science.

Manager-IT, 02/2012 - 08/2016

Verizon

- Led a 12-member team encompassing App DBA, Report, C++, and Java (UI) developers, providing technical leadership throughout the software development lifecycle and coordinating efforts with vendors, internal teams, and other business units
- Spearheaded the evaluation of public cloud options, leading a 20-member cross-functional team to select a solution in just 10 working days
- Managed the total cost of ownership and migration of applications to the AWS public cloud
- Provided education and guidance to application teams on optimizing analytics tools, resulting in successful use case implementation and enhanced ROI for Big Data resources
- Delivered Projects - Customer Journey mapping for call in rate reduction using Aster, DVS weblog analytics using Hadoop, NoSQL and Solr, Fraud POC using site catalyst data, Business user training for Tableau and Hadoop, and Text mining on survey data for increasing front line rep productivity
- Call reasons for billing related calls using vision notes using Spark,Hive,Python and machine learning.

Data Architect-IT,01/2010-2/2012

Verizon

- Built several oracle databases.
- Spearheaded the evaluation of exadata options and completed proof of concepts .
- Managed the mission critical activation database and tuned to perform 24*7 .with milli sec response.
- Provided education and guidance to application teams on optimizing queries, resulting in successful releases,upgrades and new feature implementation.

EDUCATION

- Master of business intelligence and Analytics Stevens Institute of Technology
- Certificate in Machine Learning Cornell University
- Master of Information Systems Boston University
- Bachelor of Engineering National Institute of Technology Allahabad India

Executive and entrepreneur-turned-academician with over 27 years of experience in teaching and founding/running departments/companies in five countries (USA, Singapore, Belgium, Philippines, India). In the last 11 years in academia, as a top-rated faculty and consultant, has held various leadership roles and presented research in international conferences. A critical thinker, has exemplified innovative thinking, exceptional people skills, and a global mindset.

Areas of Expertise

- Teaching excellence
- Program management
- Student mentorship
- International partnerships
- Alumni and industry relations
- Consulting and leadership coaching

Teaching Experience

(USA, India, Singapore)

- **Teaching Faculty (Adjunct) at Stevens School of Business, USA (2024)**
 - Teaching Design Thinking at graduate level (with 4.8+/5 student evaluation)
 - Developed a new course, 'Critical Thinking in Business and Technology'
- **Assistant Professor (FT faculty) at SPJIMR Mumbai, India (2013 - 2023)**
(#1 Business School in India, #FT40 globally)
 - Designed and delivered graduate-level courses in multiple management programs, (with 9.5+/10 student evaluation)
 - Courses included Critical Thinking, Design Thinking, Leadership Communication and Digital Marketing
 - Designed and delivered certificate courses for corporate and government clients
 - Conducted faculty development programs
 - Conducted Master Classes on various contemporary topics

(List in appendix)
- **Director of Education at TiE (The Indus Entrepreneur) Singapore (2012-2013)**
 - Researched, developed, and facilitated workshops for budding entrepreneurs at both undergrad and professional levels

Research, Consulting and Coaching Experience

(Europe, Singapore, Australia, India)

Presented research papers at international conferences. Research also presented to the Indian government advisory agency. Appeared in several industry panels and conferences in India, Australia, Singapore, and USA. Articles appeared in publications like Forbes India and Business World, amongst others.

(List in appendix)

As a certified coach & consultant, worked with large multinational companies and government entities, including the Indian Embassy in the Philippines, Glenmark in Mumbai, and Abbott in Mumbai, in various domains like Strategic Communication, Critical Thinking, and Leadership Coaching.

Academic Administration Experience

(USA, India)

At Stevens School of Business, Hoboken, USA

- **Associate Director of MBA Programs (2023- present)**
 - Re-designed and relaunched two executive programs: MS in Technology Management and Executive MBA
 - Created a student industry readiness track and personally coach select students
 - Develop and co-execute a plan to improve student engagement and Schools culture

At SPJIMR, Mumbai, India (#1 Business School in India, #FT40 globally)

• **Dy Program Chairperson, Executive MBA (2021- 2023)**

- Fine-tuned academic architecture, enhanced student experience and developed international immersion programs
- Collaborated with industry partners and led digital marketing to increase the application pool

• **Founder Mentor of Speak - The Public Speaking Club (2014 – 2023)**

- Worked with the annually elected student body to create a culture of debate and discussion in student community

• **Faculty Project Director, certificate programs (2015 – 2023)**

- Developed customized programs for large corporate and government organizations

• **Director, Alumni Relations (2019-2021)**

- Spearheaded a three-prong (access, engage, and collaborate) approach to building alumni relationships for the institute across a network of 15000+ alums spread globally

• **Founding Head, Career Development Program (2016-2019)**

- Founded and set up an industry readiness program, working with an annually elected student body, alumni and faculty to support participants in their preparation for entry into the industry

• **Dy Chairperson, Industry Integration (2013-2019)**

- Created and nurtured industry relationships with thought leaders and organizations for business academia conclaves, advisory councils, student mentorship initiatives

Entrepreneurial and Corporate Experience (Singapore, USA, Belgium, Philippines, India)

Twelve years (2000 – 2012) of diverse global experience in setting up and running businesses in the USA, Europe, Philippines, Singapore, and India. Clients included multinational organizations like Kroger (USA), Veritas (Europe), Tan Tok Sen Hospital (Singapore), LaSalle University (Singapore), and Nanyang Academy of Fine Arts (Singapore).

(List in appendix)

Three years of corporate experience in identifying markets and developing high-profile launch events for premium brands involving brand ambassadors from films and sports in India. Brands included super premium brands like Harry Winston and Van Cleef & Arpels.

Boards and Awards (India)

On the advisory boards of Ed-Tech start-up and award-winning international NGO. A Femina Super Achiever Award winner, also on the Editorial Advisory Board of the academic journal of a premier undergraduate college in India.

(List in appendix)

Education & Professional Training (India, Singapore, USA)

- PhD (Marketing), Indian Institute of Management, Lucknow, India (2024)
- Post Graduate Diploma in Management (MBA), SPJIMR, Mumbai, India (1997)
- B.Sc. Honors (with distinction), Delhi University, New Delhi, India (1994)

Certificates:

- Certification in Digital Marketing, Columbia Business School, USA (Online, 2019)
- Certification for Transformative Coaching, Coach Master's Academy, Singapore (2017-2018)
- Diploma for Teachers and Trainers (with distinction), Cambridge University, Singapore (2012-2013)
- Advanced Certificate in Training and Assessment, Singapore Training & Development Association, Singapore (2013)

Appendix

Teaching:

- **Academic courses taught:**
 - Design Thinking at Stevens (4.8/5 consistent student evaluations, highest 4.9/5)
 - Design Thinking at SPJIMR (9+/10 consistent student evaluations, highest 9.5/10)
 - Critical Thinking at SPJIMR (9+/10 consistent student evaluations, highest 9.1/10)
 - Business Communication at SPJIMR (9+/10 consistent student evaluations, highest 9.8/10)
 - Digital Marketing at SPJIMR (8+/10 consistent student evaluations, highest 8.8/10)
- **Academic programs taught:**
 - Graduate level programs at SPJIMR including 2-year MBA, 1-year MBA, EMBA, Family Managed Business Program, Global Management Program, Returning Women's Program, Entrepreneurial Program
- **Faculty development courses taught:**
 - Internal SPJIMR faculty: 'Engaged classroom.'
 - External faculty at Marketing Foundation of Mumbai: 'Social Listening'
- **Corporate programs taught (at SPJIMR):**
 - Design Thinking for Abbott Healthcare
 - Critical Thinking in Project Management for Larson and Toubro
 - Data-driven Communication for Larson and Toubro
 - Design Thinking for Economic Times Masterclass
 - Customer Centricity (Virtual Engagement) for Tata Management Training Centre
 - Personal Effectiveness for BSH Household Appliances
 - Customer Engagement for Yes Bank
 - Leveraging social media as a marketing tool for SCOPE Academy (Award winning Government Units)
 - Leadership Coaching for Glenmark Pharmaceuticals
 - Enhancing Performance through Coaching and Mentoring as an open certificate program
 - Business Communication for Lupin Laboratories
 - Business Communication for Times Group
 - Advanced Programme in Sales Management for Lupin Laboratories
 - Stakeholder Management for Tata Housing
 - Time Management for staff
 - Email Writing for staff

Service:

- **Editorial Position:**
 - Editorial Advisory Board: annual academic journal of Lady Shri Ram College for Women Delhi University
- **Research Article Reviewer Experience:**
 - Reviewer for Journal, Management and Labor Studies, Sage Publications
- **Social Impact:**
 - Academic Advisor for award-winning NGO: Vidya, Mumbai, India (in education for slum children)
- **Board Memberships:**
 - Board of Advisors at Untaboo, India (an Ed-tech startup)

Entrepreneurial and Corporate Experience:

- Director, Indicrats International LLP, 2002 – 2013, USA & EU
- Director, RCG Global Pte. Ltd., 2009 – 2012, Singapore
- CEO, RG Global LLC, 2007 - 2012, USA
- Trade Consultant, Embassy of India, 2001 – 2003. Philippines
- Brand Manager, Sigem 1997 – 2001, India

Speaking:

(Keynote speaker, panelist and moderator)

- Speaker & Moderator, DEI Leadership Summit, New York, July 2024
- Speaker, Harvest AI, Stevens Institute of Technology, USA, November 2023
- Speaker, LeadHERship Conference, Stevens Institute of Technology, USA, October 2023
- Speaker, DEI panel, Centelon Solutions, Australia, March 2022
- Session Chair, 12th European Marketing Academy (Research) Conference, Poland, September 13, 2021
- Podcast (DEI) interview of Ms. Megha Tata, Managing Director, Discovery India, November 2021
- Podcast (DEI) interview of Ms. Mansi Tripathy, Regional Vice President, Shell Lubricants, Singapore, July 2021
- Keynote speaker, 'D&I and Leadership', PWC USA Advisory Leadership Team, January 2021
- Moderator, 'Leadership in Crisis', Federation of Indian Chambers of Commerce & Industry (FICCI), June 2020
- Keynote speaker, Alumni Engagement, Almaschine Thought Leadership Series, June 2020
- Speaker & Moderator, DEI Leadership Summit Singapore (India Edition), India, May 2019
- Speaker panelist, 'Women Entrepreneurship', Federation of Indian Chambers of Commerce & Industry, India, March 2019
- Panel Moderator and Speaker, DEI Leadership Summit (India Edition), May 13, 2019
- Speaker panelist, 'Women in Workplace', Federation of Indian Chambers of Commerce & Industry (FICCI) and FICCI Ladies Organization, India, March 29, 2019.
- Organizer, SPJIMR Business Academia Conclave, India January 2019, 2018 and 2017
- Session Chair, Conference Track at the 8th PRME Conference (Sustainability), Asia Chapter in partnership with UN General, India, December 13, 2018.
- Speaker panelist, DEI World Summit 2017 for Women in Leadership, India, May 2017
- Speaker panelist, Marketing ComStrat 2017, India, July 2017

Writing:

(Research papers, cases, and business articles)

- Gore, R., Center of Excellence in Research and Education, Conference, IIM Indore, India, 'Do I have to? Factors on social network sites that affect user behavior and attitude'. (June 2, 2022).
- Agarwal, R. & Gore, R. (2022). Harish at Maharani Pharma. Sage Business Cases, Online ISBN:9781529779592.
- Gore, R., European Marketing Academy Regional Conference, 'User behavior on social network sites: voluntary vs. mandatory entry'. (September 22, 2021).
- Agarwal, R., Datta, S., & Gore, R. (2021). 'NAVIGATING THE SOCIAL PARADOXES: A STUDY ON WOMEN ENTREPRENEURSHIP IN INDIA', FICCI-FLO, Niti Aayog.
- Gore, R. (2020), Forbes India, 'Regular classes go online: Behind the screens'
- Gore, R. (2020), Business World Well-being, 'Gratitude In Lockdown: Story from A Slum Colony'
- Gore, R. (2020), Business World Education, 'Prep Under Lockdown: How Management Students Can Use This Time'.

Paul Rohmeyer, Ph.D.
94 Cairns Place • Belle Mead, NJ 08502
Cell 908.531.2551
paul@rohmeier.com
prohmeie@stevens.edu

Summary

Paul Rohmeyer has over twenty-five years of professional experience in IT Management, Cybersecurity, IT Governance, Risk and Compliance, among other areas. A consultant since 2000, Paul delivers executive-level guidance in the areas of risk management, information assurance and cybersecurity to leading organizations in the financial services, healthcare, pharmaceutical, and energy industries.

Paul is an adjunct faculty member at Stevens Institute of Technology where he teaches courses in cybersecurity risk management, digital innovation, project management, and database management. He previously held full-time academic positions at Stevens Institute of Technology and Embry-Riddle.

Prior to his academic career, Paul served as Director of IT for AXA Financial where he designed and implemented a complex data warehouse and business intelligence environment, and Director of IT Architecture Planning for SAIC/Bellcore where he led numerous enterprise computing projects such as the design and implementation of secure computing and messaging architectures, and management of large data centers. Paul also held management positions with CitiBank, and Midlantic National Bank.

Paul has achieved the CGEIT (Certified in the Governance of Enterprise IT), CDPSE (Certified Data Privacy Solutions Engineer), PMP (Project Management Professional), HITRUST Certified CSF Practitioner (CCSFP), and NSA-IAM (U.S. National Security Agency Information Assurance Methodology) credentials. Paul is a member of the Information Systems Audit and Control Association (ISACA) and the Project Management Institute (PMI). He previously served as a Board Member for the NJ Chapter of ISACA. A frequent speaker at industry conferences, he has been cited in information security, IT, and business publications.

Paul is a member of the editorial boards for Computers & Security (Elsevier), Cybersecurity & Cybercrime (Maritime Cybersecurity Center, Polish Naval Academy in Gdynia), and the International Journal of Service Science, Management, Engineering, and Technology (IGI Global).

Paul's academic credentials include a B.A. in Economics from Rutgers University, M.B.A. in Finance from St. Joseph's University, and M.S. and Ph.D. degrees in Information Management from Stevens Institute. His Ph.D. research at Stevens focused on Information Security Management.

Present Positions

Principal Consultant, Enterprise Risk Services
Palindrome Technologies
21 Roszel Road, Suite 105
Princeton, NJ 08540-6669

Adjunct Professor, School of Business
Stevens Institute of Technology
Castle Point on Hudson
Hoboken, NJ 07030

Professional Interests

Teaching & Research

Cybersecurity Risk Management, Information Security Management Systems, Digital Innovation, Project Management, Management Information Systems

Administration

Curriculum Development, Program Leadership

Consulting

Cybersecurity, IT Governance, Risk, and Compliance Topics

Education

Ph.D.	2006	Stevens Institute of Technology, Hoboken, NJ	Information Management
M.S.	1996	Stevens Institute of Technology, Hoboken, NJ	Information Management
M.B.A.	1991	St. Joseph's University, Philadelphia, PA	Finance
B.A.	1989	Rutgers University, New Brunswick, NJ	Economics, Philosophy Minor

Academic Experience

2021-Present Adjunct Professor, Stevens Institute of Technology, Hoboken, NJ
2015-2021 Assoc Teaching Professor, Stevens Institute of Technology, Hoboken, NJ
2017-2019 Program Director, Stevens Institute of Technology, Hoboken, NJ
2014-2015 Assistant Professor, Embry-Riddle Aeronautical University
2014-2015 Adjunct Professor, Stevens Institute of Technology, Hoboken, NJ
2011-2014 Program Director, Stevens Institute of Technology, Hoboken, NJ
2008-2012 Member, Enterprise Computing Community at Marist College
2006-2011 Member, IBM Academic Initiative
2006-2011 Industry Asst. Professor, Stevens Institute of Technology, Hoboken, NJ
2000-2006 Adjunct Professor, Stevens Institute of Technology, Hoboken, NJ
2005-2008 Curriculum Developer, Thomas Edison State College, Trenton, NJ
2002 Guest Lecturer, LaSalle University, Philadelphia, PA

Non-Academic Experience

Consultant. Cybersecurity, IT Governance, Risk, & Compliance (Jan. 2001 – Present)

Provide executive advisory consulting to senior financial services industry leaders on topics such as financial systems architecture, technology risk management and compliance, IT governance, audit and controls; information and network security; and information technology architecture.

AXA Financial. Director of IT (May 1999-January 2001)

Guided the design and implementation of technical architecture for the corporate financial data warehouse as part of AXA's global customer relationship management program. Budget oversight and project control for permanent staff and consulting team, which consisted of over 80 individuals. Designed and implemented IT general controls architecture for a complex data warehouse and business intelligence environment. Received AXA's Global CEO Project Innovation Award.

SAIC/ Bellcore. Director of IT Architecture Planning. (May 1995 – May 1999)

Led numerous enterprise computing projects such as the design and implementation of secure computing and messaging architectures. Developed and maintained secure computing labs for use by software development teams. Led risk assessment and redesign of corporate mainframe datacenter to improve disaster recovery and business resumption capabilities. Managed technology and personnel budgets. Managed project teams of up to 125 individuals. Direct report to CIO.

American Home Products. Manager of Corporate Systems. (August 1991 – May 1995)

Conducted general controls and information security audits of subsidiary businesses. Conducted numerous information security evaluations of AS400 and mainframe computing environments. Completed detailed information systems assessment of clinical data management systems in European subsidiary businesses. Designed secure messaging architectures. Contributed to development of corporate information systems security standards manual. Evaluated IT budgets and project proposals from business units. Direct report to global CIO.

Teaching

Stevens Institute of Technology: Graduate

- FIN 545 Risk Management for Financial Cybersecurity
- MGT 609 Project Management
- MGT 613 Enterprise Project Portfolio Management
- MGT 671 Digital Innovation
- MIS 501 Information Management
- MIS 610 Managing Enterprise Systems
- MIS 613 Project Portfolio Management
- MIS 620 Systems Analysis and Design
- MIS 630 Data and Knowledge Management
- MIS 636 Data Warehousing and Business Intelligence
- MIS 640 Managing Information Networks
- MIS 645 Cyber Security Principles

MIS 646 Information Security Management
MIS 647 Information Security and the Law
MIS 699 Managing Emerging Technologies
MIS 720 Network Security Architectures
MIS 750 Managing IT Organizations
SES 602 Foundations of Systems Security Engineering
SES 622 Systems Security Engineering
SME 610 Service Management in the Global Market

Stevens Institute of Technology: Undergraduate

BT333 Relational Databases for IT
BT353 Project Management
BT421 Systems Analysis and Design
MIS201 Management Information Systems
MIS401 Business Systems Analysis
MIS460 Managing the IT Organization
TG401 Entrepreneurship and Business
TG 403/404 Senior Innovation

Embry-Riddle Aeronautical University

MISA 501 Assured Business Systems: Managing and Protecting the IS Enterprise
MISA 502 Risk Management and Business Continuity

Curriculum Development

Stevens Institute of Technology

2020 Revised MIS 631 Data Management / MIS 632 Data Management Lab
2020 Developed new course; MIS 720 Managing Enterprise Network Security Arch.
2019 Developed new graduate certificate, Cybersecurity Risk Management
2016 Developed new course; FIN 545 Risk Management for Financial Cybersecurity
2013 Development Team for New Innovation Courses for Undergraduate Engineering
2011 Developed new course; Information Systems Audit and Control
2010 Developed new MS degree program; Information Security Management
2009 Developed a new course SME 610; Service Management in the Global Market
2008 Developed a new course MIS 736; Managing IT Service Operations
2008 Developed a new course MIS 735; Managing IT Service Processes
2008 Developed a new degree concentration; MSIS IT Service Management
2006 Developed a new degree concentration; MSIS Enterprise Systems
2006 Developed a new course MIS 610; Managing Enterprise Systems
2004 Developed a new course MIS 646; Information Security Management
2002 Developed new course materials for MIS 640 Managing Information Networks

Embry-Riddle Aeronautical University

2014 MISA 502 Risk Management and Business Continuity
2014 MISA 504 Enterprise Systems Architectures for Information Assurance

Thomas Edison State College, Trenton, NJ

2008 Reviewer for a new course; Project Management
2005 Developed a new course; Disaster Response & Recovery

Intellectual Contributions

Peer-Reviewed Journal Papers

Progoulakis, I., Rohmeyer, P., Nikatakos, N., (2021) "Cyber Physical Systems Security for Maritime Assets", Journal of Marine Science and Engineering, MDPI, Vol. 9, Issue 12.

Progoulakis, I., Nikatakos, N., Rohmeyer, P., Bunin, B., Dalaklis, D., Karamperidis, S. (2021) "Perspectives on Cyber Security for Offshore Oil and Gas Assets", Journal of Marine Science and Engineering, MDPI, Vol. 9, Issue 2.

Ben-Zvi, T., Rohmeyer, P., and Lombardi, D. (2015) "The Diameter and Company Profitability: An Experiment in Network Evolution", Journal of American Academy of Business, Cambridge, Vol. 21, No. 1, pp. 12-17, September 2015

Ben-Zvi T., Rohmeyer, P., Lombardi, D., (2015) "Strategic Positioning, Centrality and the Impact on Company Performance", World Journal of Management, Vol. 6, No.1, March 2015

Ben-Zvi, T., Lombardi, D., Rohmeyer P. (2015) "Support Systems for Decision Makers: Impact on Performance", International Journal of Engineering and Innovative Technology, Vol. 4, Issue 8, Feb. 2015

Peer-Reviewed Conference Proceedings

Rohmeyer, P., Ben-Zvi T., Lombardi, D., Maltz, A. (2017) "Capability Effectiveness Testing for Architectural Resiliency in Financial Systems", PICMET 2017. Conference Session Chair – Resilience of Systems.

Rohmeyer, P. and Ben-Zvi, T. (2015) "Managing Cloud Computing Risks in Financial Services Institutions", PICMET 2015.

Ben-Zvi, T. and Rohmeyer, P. (2013) "The Network Diameter and its Impact on Company Performance", PICMET 2013.

Rohmeyer, P. and Ben-Zvi T. (2012) "Emerging Trends in Decision Making of IT Leaders", PICMET 2012.

Rohmeyer, P. and Ben-Zvi T. (2010) "Risk Management Decision Making in Service Design", MCIS 2010.

Ben-Zvi T. and Rohmeyer, P. (2010) "Decision Support Systems: Impact on Company Performance", MCIS 2010.

Rohmeyer, P. and Ben-Zvi, T. (2009) "Risk Management Decision Making in ICT for Development." Second Annual Workshop, ICT in Global Development, Pre-ICIS Workshop. Phoenix, Arizona, December 2009. ISBN: 978-0-9826068-1-0

Books

Rohmeyer, P. & Bayuk, J. (2019) Financial Cybersecurity Risk Management: Leadership Perspectives and Guidance for Systems, Institutions, and Markets. Apress/Springer.

Book Chapters

Rohmeyer, P. (2012) Cybersecurity Policy Guidebook. Wiley. ISBN-10: 1118027809

Rohmeyer, P. (2010) CyberForensics: Understanding Information Security Investigations. "Technology Malpractice". Humana Press. ISBN-10: 1607617714.

Rohmeyer, P. (2004) Organizing for Security. "Guarding Your Business – Enterprise Architectures for Security". Ghosh, Malek, Stohr (ed.). Kluwer Academic Publishing. February 2004. ISBN: 0306484943.

Other Research

Rohmeyer, P. and Gupta, M. (2010). "Information Security and the Mainframe." Stevens Institute of Technology. Supported by a grant from the IBM Academic Initiative.

Rohmeyer, P. (2005). "An Evaluation of Information Security Management Effectiveness." Ph.D. Dissertation. Stevens Institute of Technology.

Rohmeyer, P. and Stohr, E. (2003). "An Examination of Business Continuity Planning Practices in the Pharmaceutical Industry". Stevens Institute of Technology. Supported by a grant from the AT&T Foundation.

Unpublished Academic Conference Presentations

November 2019 FinCyberSec Conference 2019. Theme - Emerging Trends in Cybersecurity for Financial Institutions. Conference Organizer, Event Moderator.

May 2018 FinCyberSec Conference 2018. Theme – Emerging Threats, Conference Organizer, Event Moderator

May 2017 FinCyberSec Conference 2017. Theme - Cybersecurity Effectiveness. Conference Organizer, Event Moderator

June 2016 FinCyberSec Conference 2016. Theme - Financial Cybersecurity Trends. Conference Organizer, Event Moderator

April 2013 Cyber Security in Financial Systems. Stevens Technical Leadership Conference. Hoboken, NJ.

January 2010 In Pursuit of the Insider Threat. SERC Information Security Conference. Washington, DC.

April 2004 The Role of the Chief Information Security Officer. University of California SecureIT Conference. San Francisco, CA.

October 2002 Information Security Panel. LaSalle University Computer Science Department Conference. Philadelphia, PA.

October 2002 Corporate Architecture for Security. Stevens Institute of Technology - Management of Technology Symposium, Hoboken, NJ.

Editorial Board Membership

Computers & Security (COSE) (Elsevier), Impact Factor 5.6. 2023-Present.

Cybersecurity & Cybercrime (Maritime Cybersecurity Center, Polish Naval Academy in Gdynia), 2023-Present.

International Journal of Service Science, Management, Engineering, and Technology (IJSSMET), IGI Global. 2011-Present.

Ph.D. Committees

Bayuk, Jennifer. Measuring System Security. Stevens Institute of Technology. Defended 2012.

Friedhof, Jerry. IT Risk Analysis. Stevens Institute of Technology. Defended 2016.

Goren, Esra. Stevens Institute of Technology. HIPAA Security Rule. Defended 2016.

Grants Awarded

Name	Agency	Amount\$	Start/End	PI	Co-PIs
Information Security and the Mainframe	IBM Academic Initiative	\$25,000	5/1/08 – 9/1/10	Paul Rohmeyer	
Business Continuity in the Pharmaceutical Industry	AT& T Foundation	\$50,000	6/1/03 – 9/1/04	Lou Laucirica, E. Stohr	Paul Rohmeyer

Awards and Honors

2008 IBM Faculty Award – Enterprise Systems

2000 AXA Global CEO Project Innovation Award – Business Intelligence Architecture

Practice Activities

Professional Certifications

Project Management Professional (PMP)
Certified in the Governance of Enterprise IT (CGEIT)
Certified Data Privacy Solutions Engineer, (CDPSE)
HITRUST Certified Cybersecurity Framework Practitioner (CCSFP)
U.S. National Security Agency Information Assurance Methodology (NSA IAM)

Consulting

Completed numerous cybersecurity risk and IT Governance, Risk and Compliance projects for organizations in banking, financial services, life sciences, pharmaceuticals, healthcare, and other industries.

Professional Organizations

2015-2018 Elected Board Member, Information Systems Audit and Controls Association (NJ Chapter)

Professional Society Memberships

Information Systems Audit and Control Association (ISACA)
Project Management Institute (PMI)
Ponemon Institute (Fellow)

Professional Development

Completed numerous technical training programs on financial and information systems management, security and audit. Completed Bellcore's Project Management Development program.

Technical Skills

Network Security Systems Architecture, including Firewalls and Intrusion Detection
Distributed Systems and E-Commerce Architectures
Business Intelligence Architectures
Data Center Management
MySQL, Postgress, other database management systems
SAS
WordPress

Industry Conference Presentations

June 2020 InfoSecWorld Digital Conference. Cyber Risk in IoT (Internet of Things).
Cyber Risk Alliance.

February 2020 Analyzing Risk in Emerging Technologies - Webinar Series. ISACA Harrisburg Chapter. Harrisburg, PA. Session 1 – Risk in Internet of Things, Session 2 – Risk in Blockchain, Session 3 – Risk in Artificial Intelligence and Machine Learning.

- June 2019 Building and Measuring Enterprise Cybersecurity Capabilities. ISACA Harrisburg Chapter. Harrisburg, PA.
- April 2019 How Do We Keep Current? Developing a Continuing Educational Program for Your Cyber Team. InfoSecWorld 2019 Conference. Orlando, FL.
- March 2019 Challenges in Responding to Real-World Cyber Incidents. ISACA Greater Hartford Chapter. Hartford, CT.
- March 2018 Crafting a Cyber Vision - Building the Ideal Cybersecurity Architecture. InfoSecWorld 2018 Conference. Orlando, FL.
- April 2017 Facing Emerging Threats - Evolving from Penetration Testing to Capability Effectiveness Testing, InfoSec World 2017 Conference. Orlando, FL.
- April 2016 Hedging Your Bets: Using Cyber Insurance as a Technology Risk Treatment Option. InfoSec World 2016 Conference. Orlando, FL.
- March 2015 The New Security Leader. InfoSec World 2015 Conference. Orlando, FL.
- December 2014 Cloud Computing Governance, Risk, and Compliance. MISTI Cloud Security Summit. Orlando, FL.
- April 2014 Big Data Security. InfoSec World 2014 Conference. Orlando, FL.
- December 2014 Cloud Computing Governance, Risk, and Compliance. Cloud Security Summit. Orlando, FL
- April 2014 Big Data Security. InfoSec World Conference Presented by MIS Training Institute. Orlando, FL.
- February 2012 Mobility – Security Case Study. New Jersey Tech Council CIO Conference. East Brunswick, NJ.
- April 2010 Data Leakage in the Web 2.0 Environment. InfoSecWorld Conference Presented by MIS Training Institute. Orlando, FL.
- April 2010 Security in IP Messaging Architectures. InfoSecWorld Conference Presented by MIS Training Institute. Orlando, FL.
- October 2009 Risk Management - Presentation and Panel Discussion. ISACA Audit Directors Roundtable. Florham Park, NJ
- January 2009 Design of Access Control Mechanisms. ISACA Training Week. Philadelphia, PA
- August 2008 New Technologies and Compliance. FDIC Annual Conference. Arlington, VA.
- July 2008 Selecting a Security Management Platform. TechTarget.com Podcast. Needham, MA.

October 2007 Identity Management Strategies. Government Security Summit 2007 Presented by MIS Training Institute. Arlington, VA.

May 2006 IT Service Provider Oversight. New Jersey Bankers Association Annual Compliance School. Iselin, NJ.

January 2005 Due Diligence for IT Service Providers. BankSecurity News Annual Conference. Los Angeles, CA.

May 2004 Developing the Information Security Program. Massachusetts Society of CPA's. Boston, MA.

March 2004 Regulatory Requirements for the Information Security Program. CBS Fiserv Worldwide Conference. Orlando, FL.

November 2003 Penetration Testing – Tools and Techniques. Internal Auditors Division, Securities Industry Association (SIA). New York, NY.

May 2003 Developing the Information Security Program. New Jersey Bankers Association Compliance Officers School, Cranbury, NJ.

October 2002 Assessment of Information Security Architectures: Concepts and Methodologies. Telemanagement Forum - University Workshops. Las Vegas, NV

October 2002 Executive Security Roundtable. Hosted by CMP Media and CRN Magazine. New York, NY.

March 2002 HIPAA Security Requirements. ECC Annual Conference. New York, NY.

March 2002 Enterprise Information Security Architectures. Guest Lecture at LaSalle University. Philadelphia, PA

February 2002 Business Continuity & Disaster Recovery Planning. HIMSS 2002 National Conference. Atlanta, GA.

Industry Publications

GLBA Compliance and Emerging Technologies. Information Security Magazine. March 2010

Relying on basic network intrusion detection systems isn't enough. Information Security Magazine. March 2010.

Compliance is not Security. Information Security Magazine. November 2009.

Inviting Risk – Managing the Information Risks Associated with the use of Contractors. Information Security Magazine. May 2007.

Risky Business – How to Perform a Business Impact Analysis. Information Security Magazine. November 2006.

All Penetration Tests are Not Created Equal. Co-Authored with Blake Wiedman. New Jersey Bankers Association Journal. Winter 2004.

Industry Media Commentary

04.03.22	Cyber Defense: Paul Rohmeyer Of Stevens Institute of Technology On The 5 Things Every American Business Leader Should Do To Shield Themselves From A Cyberattack	Authority Magazine
11.23.20	7 Attributes Every IT Leader Must Have	CIO Magazine
11.04.20	Fraud in Cash Payment Apps a 'Growing Problem'	Newsday.com
08.12.20	7 steps to prepare IT for a second-wave COVID-19 outbreak	CIO Magazine
06.29.20	IoT adds value, risk but management within reach	SC Magazine
06.23.20	7 low-cost, high-impact IT initiatives you can launch today	CIO Magazine
03.12.19	How Moving Away From Traditional Academia Has Changed Cybersecurity Education	SC Magazine
11.20.19	Disney Blames Past Hacks for User Accounts Sold Online	Associated Press – Numerous Online and Print Outlets.
07.24.17	Choosing the Infosec Career Path That's Right for You	MIS Training Institute (MISTI)
05.08.17	Forget about the firewall: Employees are first line of defense	NJBIZ
06.12.12	Is Flame virus fallout a Chinese, Russian plot to control the Internet?	MSNBC.com
04.01.11	An Internet Kill Switch Wouldn't Ensure Security	Information Security Magazine
03.21.11	Working to Get Shoppers to Trust Phone Security	NJ BIZ Magazine
05.20.10	Cybersecurity Bill Lacks Details	Information Security Magazine
03.07.10	GLBA compliance and emerging technologies	Information Security Magazine
08.25.09	Audit Requirements Drive Demand for Privileged Account Management	Information Security Magazine
09.04.08	Lessons learned: The State Street Corp. Breach.	Information Security Magazine
02.01.08	Interlocking Priorities.	Information Security Magazine
05.01.07	Inviting Risk - Contractor Risks.	Information Security Magazine

11.01.06	Risky Business - Business Impact Analysis.	Information Security Magazine
09.01.05	Business Intelligence – Training Certifications.	SC Magazine.
07.11.05	Cardsystems Breach Leaves Company Open to Large Fines.	BankSecurityNews
02.01.05	Honeypot Project Finds Decline in Linux Attacks.	SC Magazine
02.23.04	Securing Compliance.	CRN Magazine
01.27.04	Mydoom Predicted to be as Bad as Sobig.	Wall Street & Technology
01.23.04	The Final Cut – Symantec’s Reach.	CRN Magazine
11.17.03	Sourcefire Rolls Out Realtime Network Awareness Device.	CRN Magazine
11.01.03	Get Qualified – Why Certification is the Name of the Game.	SC Magazine
04.11.03	Tactical Maneuvers.	CRN Magazine
04.11.03	Solution Providers Differ On Market Opportunities.	CRN Magazine
03.21.03	Security Focus Sharpens, not all businesses are ready to spend.	CRN Magazine
02.04.03	Slammer Points Out Security Flaws.	CRN Magazine
01.27.03	Slammer Worm Highlights Need For Up-To-Date Security.	CRN Magazine
11.25.02	Patch Management Software Catching On.	CRN Magazine
10.23.02	To Err is Human, to Pick up Business Divine.	Computing (UK)
10.22.02	Bucking A Down Economy.	CRN Magazine
07.17.02	Solution Providers Upbeat On Symantec Acquisitions.	CRN Magazine
07.03.02	Symantec Eyes Desktop.	CRN Magazine
03.13.02	Simple Win For Symantec.	CRN Magazine
01.11.02	AOL Instant Messaging Flaw Spurs Security Debate.	CRN Magazine
11.16.01	Symantec’s Strategic Shift.	CRN Magazine
10.19.01	Scares Could Renew Interest In PKI, E-Docs.	CRN Magazine
11.03.00	Cognos Conjures up Uses for Intelligent Software.	Investor's Business Daily

OVERVIEW

Lead large-scale business model strategy, operating model, and workforce transformation programs across the front-, middle-, and back-office of the financial services sector. Focus on the future of financial services and the implications for work, the workforce and workplace.

EXPERTISE

Leading organizational change, specializing in socio-technical systems.

- Business & Operating Model Transformation
- Application of Innovative Technologies (Cloud, AI/ML, IoT)
- Workforce Transitions, Upskilling & Adoption

PUBLICATIONS & HONORS

- Leveraging Talent for Sustained Performance; Springer; June 2022
- Workplace Reflection in the Age of AI: Materiality, Technology and Machines; Sage; June 2020
- The Evolution of the Workforce During the Fourth Industrial Revolution; Taylor & Francis; May 2020
- CIO 100 Award Winner for JPMorgan Chase & Co.'s AI/ML Platform—OmniAI
- Workforce Development During the Fourth Industrial Revolution; Academy of Human Resource Management (AHRM); February 2020
- The Future of Work; International Transformative Learning Conference; Columbia University; November 2018
- State-Sponsored Cryptocurrency: Adapting the best of Bitcoin's Innovation to the Payments; Deloitte; July 2015
- Robo-Advisors: Capitalizing on a Growing Opportunity; Deloitte; July 2015
- 10 Disruptors in Wealth Management; Deloitte; June 2015
- Reshaping the Customer Experience in Retail Banking; Deloitte; December 2014
- Governance Operating Models in Financial Services; Deloitte; March 2014
- Decision Rights in Financial Services: Defining the New Normal; Deloitte; April 2012
- Building Enterprise Risk Intelligence in Banking and Securities; Deloitte; February 2012
- The M in ERM; The Risk Professional; December 2009

DENISE ROTATORI, PHD

+1.646.226.6028 | DENISE.ROTATORI@OUTLOOK.COM

EXPERIENCE

Senior Director, Engineering

Bank of New York (BNY). New York. July 2020 – Present.

- Support the definition of the firm's technology strategy and associated resiliency priorities to execute across the firm's lines of business in a consistent, scalable fashion, including regular briefings to the BNY Board of Directors and Technology Operating Committee
- Identify and incorporate emerging technology trends into the delivery roadmap (e.g., approach for scaling cloud technologies, artificial intelligence and blockchain)

Executive Director, Global Technology

JPMorgan Chase & Co (JPMC). New York. January 2018 – July 2020.

- Responsible for standing up a new Chief Technology Office (CTO) to deliver cross-functional capabilities for the firm across LOBs (e.g., cloud computing, artificial intelligence)
- Responsible for articulating CTO's strategy and progress on delivery, including regular briefings to senior executive forums, including the Operating Committee, Firmwide Risk Committee and Global Technology Leadership
- Accountable for leading end-user adoption and engagement across CTO initiatives to ~50K global technologists/engineers

Director, Global Markets Technology

Credit Suisse. New York. September 2015 – December 2017.

- Lead strategy, business model transformation and day-to-day departmental operations (financial management, risk management, human capital management, communications) for the Global Markets technology department
- Lead project portfolio governance for F2B firm-wide programs within the repo trading and margin services for house collateral (OTC & Secured Financing Transactions) businesses (e.g., OCRR, CCAR)
- Responsible for orchestrating operating model transformation across the Bank's Group Business Services (GBS), with the goal of driving increased transparency around service demand and cost
- Served as an architect for applying leading innovation trends like IoT, Robotics and Machine Learning into the mid- and back-office

Senior Manager; Deloitte Consulting LLP

New York, NY. January 2011 – September 2015.

- Financial services business model transformation; delivered large-scale workforce change programs across the front-, middle- and back-office
- Surpassed sales and managed revenue targets (\$5M annually); representative clients include AIG, AXA, Bank of America, CLS, Citigroup, Credit Suisse, Deutsche Bank, HSBC, Liberty Mutual, Vanguard, Wells Fargo

Manager; Bridgewater Associates LLP | Consultant; Willis Towers Watson | College Work-Study; UBS

EDUCATION

Columbia University

Doctor of Philosophy (Ph.D.); Organizational Development & Change; February 2020

- Dissertation: *Leaders Adapt to the Workforce Implications Associated with the Increased use of Artificial Intelligence in Financial Services During the Fourth Industrial Revolution*
- Post-Doctoral Research (Fielding University): *Human-Machine Collaboration in Financial Services during the Fourth Industrial Revolution: A Case Study*

The University of Pennsylvania

Masters of Science (M.S.); Organizational Dynamics; May 2010

- Thesis: *Organizational Life: Recovering the Ethical Foundation for an Innovative Future* (post-2008 Financial Crisis)

Duke University

Bachelors of Science (B.S.); Economics; May 2005

- Minors: Mathematics and Philosophy; Year early graduation; Dean's List; Phi Beta Kappa; Leading at Duke Award; Activities: Duke Investment Club, President Duke Golf Club

COMMUNITY INVOLVEMENT

MBA Faculty: Stevens Institute of Technology, Business School. 2022-Present.

Alumni Interviewer: Duke University. 2010-Present.

Executive Sponsor: Year Up Partnership @BNYM. 2020-Present.

Executive Sponsor: Code for Good @JPMC. 2018-2020.

Executive Sponsor: Junior Achievement Partnership @Deloitte. 2011-2015.

Narczyz Roztocki, Ph.D.
Professor (tenured) (State University of New York)
Phone: (845) 257-2935
E-mail: roztockn@newpaltz.edu

Vita Summary

- 40 Published Papers in Peer Reviewed Journals
- 64 Published Papers in Refereed Conference Proceedings
- Special Issue Co-Editor for IS/MIS-Discipline Journals
 - *Electronic Journal of Information Systems in Developing Countries (EJISDC)* with Jolanta Kowal, Vol. 57 (2013)
 - *Journal Information Systems Management (ISM)* with Heinz Roland Weistroffer, Vol. 28, No. 3 (2011).
 - *Journal Information Technology for Development (ITD)* with Heinz Roland Weistroffer, Vol. 17, No. 3 (2011).
 - *European Journal of Information Systems (EJIS)* with Nicholas Romano, Jr. and James Pick, Vol. 19, No. 2 (2010).
 - *International Journal of E-Collaboration (IJeC)* with Nicholas Romano, Jr. and James Pick, Vol. 5, Issue 1 and Issue 2 (2009).
 - *Journal of Global Information Technology Management (JGITM)* with Heinz Roland Weistroffer, Vol. 11, No. 4 (2008).
 - *Journal Information Technology for Development (ITD)* with Heinz Roland Weistroffer, Vol. 14, No. 1 (2008), pp. 1-10.
 - *Journal of Information Technology Theory and Application (JITTA)* with Nicholas Romano, Jr. and James Pick, Vol. 8 No. 4 (2007).
 - *Journal of Information Science and Technology (JIST)* with James Pick, Vol. 2, No. 4 (2005).
 - *Electronic Journal of Information Systems in Developing Countries (EJISDC)* with James Pick and Carlos Navarrete, Vol. 19 (2004).
- Senior Editor/Member of the Editorial Review Board
 - *Journal of Global Technology Management (JGITM)*.
 - Senior Editor for journal *Information Technology for Development (ITD)*.
 - Senior Editor for the journal *Information Systems Management (ISM)*.
- Track Co-Chair
 - Americas Conference on Information Systems (AMCIS) 2009-2010, 2012-2018.
- Mini-Track Co-Chair
 - Hawaii International Conference on System Sciences (HICSS) 2006-2018.
 - Americas Conference on Information Systems (AMCIS) 2004-2009.
- Associate Editor
 - International Conference on Information Systems (ICIS) 2005-2009, 2011.
- Reviewer (Selected)
 - *MIS Quarterly*
 - *Journal of Management Information Systems (JMIS)*,
 - *European Journal of Information Systems (EJIS)*; and
 - *Decision Support Systems (DSS)*.
- Teaching (Selected Courses)
 - Graduate (MBA) Courses:
 - Managing Operations and Information Technology
 - Management Information Systems
 - Undergraduate Courses:
 - Business Decision Support Systems
 - Operations Management
 - Statistics for Business and Economics I

Narczyz Roztocki, Ph.D.
Professor (tenured)

School of Business
State University of New York at New Paltz
75 South Manheim Blvd., New Paltz, NY 12516-2443
Phone: (845) 257-2935
E-mail: roztockn@newpaltz.edu

Education

Ph.D., August 1999

University of Pittsburgh, Pittsburgh, PA
Major Field: Industrial Engineering

M.S.,(Diplom-Ingenieur), June 1991

Technische Universität Hamburg-Harburg (TUHH), Hamburg, Germany
Major Field: Mechanical Engineering

Dissertation

Title:

An Integrated Activity-Based Costing and Economic Value Added System for Small Manufacturing Companies

Executive Summary:

The dissertation proposes an integrated costing and performance measurement system that combines Activity-Based Costing with Economic Value Added. This system will give managers in small manufacturing companies more accurate and reliable product cost information that will lead to improved decision making and the ability to increase a company's value. The purpose of proposed research is to investigate how to create and implement such a joint system as well as evaluate its potential impact on small manufacturers' business performance.

Professional and Related Experience

2012–Present

Professor (tenured)
State University of New York (School of Business), New Paltz, NY
Associate Professor of MIS
1.0 (Full-Time)

2005–2012

Associate Professor (tenured)
State University of New York (School of Business), New Paltz, NY
Associate Professor of MIS
1.0 (Full-Time)

1999–2005

Assistant Professor
State University of New York (School of Business), New Paltz, NY
Assistant Professor of MIS
1.0 (Full-Time)

1995–1999

Research and Teaching Assistant
University of Pittsburgh, Pittsburgh, PA
Research and Teaching Assistant
0.5 (Part-Time)

1995

Certified Computer Aided Design Trainer
CAAD-Labor Buxtehude, Buxtehude, Germany
Taught courses in AutoCAD for professionals
0.25 (Part-Time)

1991–1995

Instructor
Fachhochschule, Nordostniedersachsen, Lüneburg, Germany
Instructor and Lab Engineer
1.0 (Full-Time)

Fellowships, Awards, Grants Received**2019**

2019-2020 Research and Creative Projects Award
State University of New York (SUNY), New Paltz, NY
Received \$1,300.00

2018

National Science Centre Poland (Narodowe Centrum Nauki) Grant
“Effectiveness of Enterprise System Implementations in the Public Sector”
OPUS 15 Program; Granted funds: 176,820 PLN 2019-2022

2018-2019 Research and Creative Projects Award
State University of New York (SUNY), New Paltz, NY
Received \$1,750.00

2017

2017-2018 Research and Creative Projects Award
State University of New York (SUNY), New Paltz, NY
Received \$1,500.00

2016

Finalist for the Best Paper Award at the 49th Hawaii International Conference on System Sciences (HICSS 2016), Kauai, Hawaii, January 5-8, 2016.

Professional Development Award

State University of New York (SUNY), New Paltz, NY
Received \$500.00

2016-2017 Research and Creative Projects Award

State University of New York (SUNY), New Paltz, NY
Received \$2,500.00

2014

School of Business Award in Category Research

School of Business at the State University of New York (SUNY), New Paltz, NY
Received \$1,000.00

2013

2013-2014 Research and Creative Projects Award

State University of New York (SUNY), New Paltz, NY
Received \$1,530.00

2012

2012-2013 Research and Creative Projects Award

State University of New York (SUNY), New Paltz, NY
Received \$1,880.00

2011

2011-2012 Research and Creative Projects Award

State University of New York (SUNY), New Paltz, NY
Received \$1,103.00

Professional Development Award

State University of New York (SUNY), New Paltz, NY
Received \$1,000.00

2008

Professional Development Award

State University of New York (SUNY), New Paltz, NY
Awarded \$881.00

2006

Professional Development Award

State University of New York (SUNY), New Paltz, NY
Received \$746.00

2005

2005-2006 Research and Creative Projects Award
State University of New York (SUNY), New Paltz, NY
Received \$1,300.00

2004

Winner of the 2004 Ted Eschenbach Best Engineering Management Journal Paper in Volume 15.

Professional Development Award
State University of New York (SUNY), New Paltz, NY
Received \$1,000.00

2004-2005 Research and Creative Projects Award
State University of New York (SUNY), New Paltz, NY
Received \$1,050.00

2003

2003-2004 Research and Creative Projects Award
State University of New York (SUNY), New Paltz, NY
Received \$1,300.00

Professional Development Award
State University of New York (SUNY), New Paltz, NY
Received \$496.27

2002

2002-2003 Research and Creative Projects Award
State University of New York (SUNY), New Paltz, NY
Received \$2,500.00

2000

2000-2001 Research and Creative Projects Award
State University of New York (SUNY), New Paltz, NY
Received \$1,500.00

1999

Finalist for the Merritt Williamson Best Paper Award at the 1999 ASEM (American Society for Engineering Management) Annual National Conference

1998

Finalist for the Merritt Williamson Best Paper Award at the 1998 ASEM (American Society for Engineering Management) Annual National Conference

Publications

Refereed Journals (40)

40. Roztocki, N., Strzelczyk, W., Weistroffer, H. R. (2024). Enterprise Systems in the Public Sector: Current Research Landscape, *Information Systems Management*, DOI: 10.1080/10580530.2024.2361617
39. Roztocki, N., Strzelczyk, W., Weistroffer, H. R. (2024). Impact of COVID-19 on e-government: a pilot study of Poland, *Information Technology for Development*, DOI: 10.1080/02681102.2024.2361477
38. Roztocki, N., Strzelczyk, W., Weistroffer, H. R. (2023). The role of e-government in disaster management: A review of the literature. *Journal of Economics and Management*. Vol.45. https://sbc.org.pl/Content/647818/01_06.pdf
37. Roztocki, N., Strzelczyk, W., Weistroffer, H. R. (2020). Sustaining Organizational Operations during an Outbreak: Problems, Needs, and Opportunities for Information Systems. *Information Systems Management*, 37(4), 348-356. <https://www.tandfonline.com/doi/full/10.1080/10580530.2020.1821133>
36. Roztocki, N., Soja, P., Weistroffer, H. R. (2020). Enterprise systems in transition economies: research landscape and framework for socioeconomic development. *Information Technology for Development*, 26(1), 1-37. <https://doi.org/10.1080/02681102.2017.1377148>
35. Narcyz Roztocki, Piotr Soja and Heinz Roland Weistroffer 2019. "The role of information and communication technologies in socioeconomic development: towards a multi-dimensional framework," *Information Technology for Development*, (25:2), pp. 171-183. DOI: 10.1080/02681102.2019.1596654.
34. Gabryelczyk, R. and Roztocki, N. 2018. "Business Process Management Success Framework for Transition Economies" *Information Systems Management (ISM)*, (25:3), pp. 234-253. DOI: 10.1080/10580530.2018.1477299.
33. Roztocki, N. and Weistroffer, H.R. 2016. "Conceptualizing and Researching the Adoption of ICT and the Impact on Socioeconomic Development," *Information Technology for Development* (22:4), pp. 541-549.
32. "Job Satisfaction of IT Professionals in Poland: Does Business Competence Matter?" with Jolanta Kowal. *Journal of Business Economics and Management (JBEM)* (2015), Volume 16, Issue 5, pp. 995-1012.
31. "Information and Communication Technology in Transition Economies: An Assessment of Research Trends," with Heinz Roland Weistroffer. *Information Technology for Development (ITD)* (2015), Vol. 21, No. 3, pp. 330-364.

30. "Does Organizational Ethics Improve IT Job Satisfaction In The Visegrád Group Countries? Insights from Poland," with Jolanta Kowal. *The Journal of Global Information Technology Management (JGITM)* (2015), Vol. 18, No. 2, pp. 127-145.
29. "Investments in Enterprise Integration Technology: An Event Study," with Heinz Roland Weistroffer. *Information Systems Frontiers (ISF)* (2015), Vol. 17, No. 3, pp. 659-672.
28. "Adoption of ERP Systems: Does Information Transparency Matter?" with Ibrahim M. Al-Jabri. *Telematics & Informatics*, (2015), Vol. 32, No. 2, pp. 300-310.
27. "Creativity, Coordination and Knowledge Co-Creation on a Global Scale - The Process Perspective," with Olivera Marjanovic. *Journal of International Technology and Information Management*, Vol. 22, No. 1, (2013), pp.43-63.
26. "Information and Communication Technology Management for Global Competitiveness and Economic Growth in Emerging Economies," with Jolanta Kowal. *The Electronic Journal of Information Systems in Developing Countries*, Vol. 57, 1 (2013).
25. "Information Technology Investment Announcements and Market Value in Transition Economies: Evidence from Warsaw Stock Exchange," with Dorota Dobija, Karol Klimczak and Heinz Roland Weistroffer. *Journal of Strategic Information Systems (JSIS)*, Vol. 21, No. 4 (2012), pp. 308-319.
24. "From the Special Issue Editors: Information Technology in Transition Economies," with H. Roland Weistroffer. *Information Systems Management (ISM)*, Vol. 28, No. 2 (2011), pp. 188-191.
23. "Information Technology Success Factors and Models in Developing and Emerging Economies," with H. Roland Weistroffer. *Information Technology for Development (ITD)*, Vol. 17, No. 3 (2011), pp. 163-167.
22. "A Motivational Model for Technology-Supported Cross-Organizational and Cross Border Collaboration," with Nicholas Romano, Jr. and James Pick. *European Journal of Information Systems (EJIS)*, Vol. 19, No. 2 (2010), pp. 117-133.
21. "Activity-Based Management for Electronic Commerce: A Structured Implementation Procedure." *Journal of Theoretical and Applied Electronic Commerce Research (JTAER)*, Vol. 5, No. 1 (2010), pp. 1-10.
20. "Information Technology Investments: Does Activity based Costing Matter?" with Heinz Roland Weistroffer. *Journal of Computer Information Systems (JCIS)*, Vol. 50, No. 2 (2009), pp. 31-41.
19. "Research Trends in Information and Communications Technology in Developing, Emerging and Transition Economies," with Heinz Roland Weistroffer. *Roczniki Kolegium Analiz Ekonomicznych* (Annals of the Collegium of Economic Analysis) published by

Warsaw School of Economics, Collegium of Economic Analysis, Warsaw, Poland, Vol. 20 (2009), 113-127.

18. "The Impact of Enterprise Application Integration on Stock Prices" with Heinz Roland Weistroffer. *Journal of Enterprise Information Management (JEIM)*, Vol. 22, No. 6 (2009), pp.709-721.

17. "Investigating the Impact of Firm Strategy – Click-and-Brick, Brick-and-Mortar, and Pure-Click – on Financial Performance," with Myung Ko. *Journal of Information Technology Theory and Application (JITTA)*, Vol. 10, Issue 2 (2009), pp.4-18.

16. "Synthesizing the Research Advances in Electronic Collaboration: Theoretical Frameworks" with James Pick and Nicholas Romano, Jr. *International Journal of e-Collaboration (IJeC)*, Vol. 5, Issue 1 (2009), pp. 1-12.

15. "Evaluating Investments for Services: A Value Chain Analysis Framework," with Heinz Roland Weistroffer. *Journal of Service Science (JSS)*, Vol. 1, No. 2 (2008), pp. 47-56.

14. "Information Technology in Transition Economies," with Heinz Roland Weistroffer. *The Journal of Global Information Technology Management (JGITM)*, Vol. 11, No. 4 (2008), pp. 1-10.

13. "Information Technology Investments in Emerging Economies," with Heinz Roland Weistroffer. *Information Technology for Development (ITD)*, Vol. 14, No. 1 (2008), pp. 1-10.

12. "Editorial Introduction to the Special Issue on Collaboration Issues in Cross-Organizational and Cross-Border IS/IT," with Nicholas Romano, Jr. and James Pick. *Journal of Information Technology Theory and Application (JITTA)*, Vol. 8, No. 4 (2007), pp. iii-iv.

11. "Stock Price Reaction to the Investments in IT: Relevance of Cost Management Systems," with Heinz Roland Weistroffer. *Electronic Journal of Information Systems Evaluation (EJISE)*, Vol. 9, No. 1 (2006), pp. 27-30.

10. "Evaluating Information Technology Investments: A Fuzzy Activity-Based Costing Approach," with Heinz Roland Weistroffer. *Journal of Information Science and Technology (JIST)*, Vol. 2, No. 4 (2005), pp.30-43.

9. "Introduction to the Special Issue on Information Technology Investments in Emerging Economies," with James Pick. *Journal of Information Science and Technology (JIST)*, Vol. 2, No. 4 (2005), pp.1-5.

8. "Offshoring without Profit or the New Global Model?" with Jerry Fjermestad. *Journal of Information Science and Technology (JIST)*, Vol. 2, No. 2 (2005), pp. 1-4.

7. "A Procedure for Smooth Implementation of Activity-Based Costing in Small Companies," with J. David Porter, Robin M. Thomas and Kim LaScola Needy. *Engineering Management Journal (EMJ)*, Vol.16, No.4 (December 2004), pp. 19-27.

6. "IT Investments in Developing Countries: Editorial Introduction," with James Pick and Carlos Navarrete. *The Electronic Journal of Information Systems in Developing Countries (EJISDC)*, Vol. 19, 0, 1-3 (October 2004).
5. "Evaluating Information Technology Investments Emerging Economies Using Activity-Based Costing," with Heinz Roland Weistroffer. *The Electronic Journal of Information Systems in Developing Countries (EJISDC)*, Vol. 19, 2, 1-6 (October 2004).
4. "An International Comparison of the Use of Cost Management and Financial Tools," with Joan Hollister and Sally M. Schultz. *Journal of Accounting and Finance Research (JAFR)*, Vol. 12 No. 5 (Fall II, 2004), pp. 42-48.
3. "The Integrated Activity-Based Costing and Economic Value Added System for the Service Sector." *International Journal of Service Technology and Management*, Special Issue on "Managing the Technologies to Enhance the Services in High-Tech Industry," Vol. 4, Nos. 4/5/6 (2003), pp. 494-506.
2. "Implementing Activity-Based Costing Systems in Small Manufacturing Firms: A Field Study, with Kim LaScola Needy, Heather Nachtmann, Rona Colosimo Warner, and Bopaya Bidanda. *Engineering Management Journal*, Vol.15, No.1 (March 2003), pp. 3-10.
1. "Integrating Activity-Based Costing and Economic Value Added in Manufacturing," with Kim LaScola Needy. *Engineering Management Journal*, Vol.11, No.2 (June 1999), pp. 17-22.

Refereed Conference Proceedings (64)

64. Roztocki, N., Strzelczyk, W. (2020). Enterprise Systems in the Public Sector: A Literature Review. *Proceedings of the 26th Americas Conference on Information Systems (AMCIS 2020)*, Salt Lake City, Utah, USA (on-line) (pp. Paper 23).
63. "What Attracts the Best Information Technology Talents? Employer Branding in Transition Economies" with Dorota Dobija, Grzegorz Mazurek Grzegorz Mazurek, and Heinz Roland Weistroffer. *Proceedings of the 24th Americas Conference on Information Systems (AMCIS 2018)*, New Orleans, LA, August 16-18, 2018.
62. "Effects of BPM on ERP Adoption in the Public Sector," with Renata Gabryelczyk. *Proceedings of the 22nd Americas Conference on Information Systems (AMCIS 2017)*, Boston, MA, August 10-12, 2017.
61. "The Six Pillars of Knowledge Economics," with Carsten Brockmann. *Proceedings of the 50th Hawaii International Conference on Systems Sciences (HICSS 2017)*, Hilton Waikoloa Village, Waikoloa, Hawaii, January 4-7, 2017.
60. "Business Process Management in Transition Economies: Current Research Landscape and Future Opportunities" with Renata Gabryelczyk and Arkadiusz Jurczuk. *Proceedings of*

the 22nd Americas Conference on Information Systems (AMCIS 2016), San Diego, CA, August 11-14, 2016.

59. "Gender and Job Satisfaction of Information Technology Professionals in Transition Economies" with Jolanta Kowal. *Proceedings of the Hawaii International Conference on System Sciences (HICSS 2016)*, Kauai, Hawaii, January 5-8, 2016.

58. "Enterprise Systems in Transition Economies: An Initial Literature Review" with Piotr Soja, and Heinz Roland Weistroffer. *Proceedings of the 21th Americas Conference on Information Systems (AMCIS 2015)*, Puerto Rico, August 13-15, 2015.

57. "Topics on Knowledge Management: An Empirical Insight into Articles Published in the International Journal of Knowledge Management," with Carsten Brockmann. *Proceedings of the 48th Hawaii International Conference on Systems Sciences (HICSS 2015)*, Grand Hyatt, Kauai, Hawaii, January 5-8, 2015.

56. "Market Reaction to Information Technology Investment Announcements in Russian Firms" with Xenia Boyko, Elena Rogova, and Heinz Roland Weistroffer. *Proceedings of the 20th Americas Conference on Information Systems (AMCIS 2014)*, Savannah, Georgia, August 9-11, 2014.

55. "The Evolution of Knowledge Economics through the Course of Time - An Analysis of the Hawaii International Conference System Sciences Minitrack" with Carsten Brockmann. *Proceedings of the 47th Hawaii International Conference on System Sciences (HICSS-2014)*, Hilton Waikoloa, Big Island, Hawaii, January 6-9, 2014.

54. "Information Technology Investments and Stock Market Reaction: Evidence from Czech Republic, Hungary and Slovakia," with Radoslav Delina, Miroslava Packová and Heinz Roland Weistroffer. *Proceedings of the Second International Conference on ICT Management for Global Competitiveness and Economic Growth in Emerging Economies (ICTM 2013)*, Wroclaw, Poland, September 16-17, 2013.

53. "The Current Research Landscape of Crowdsourcing: Implications for Emerging Economies," Olivera Marjanovic. *Proceedings of the Second International Conference on ICT Management for Global Competitiveness and Economic Growth in Emerging Economies (ICTM 2013)*, Wroclaw, Poland, September 16-17, 2013.

52. "Organizational Ethics and Job Satisfaction of Information Technology Professionals in Poland," with Jolanta Kowal. *Proceedings of the Nineteenth Americas Conference on Information Systems (AMCIS 2013)*, Chicago, Illinois, USA, August 15-17.

51. "Information Technology Research Trends in Transition Economies," with Heinz Roland Weistroffer. *Proceedings of the International Conference on ICT Management for Global Competitiveness and Economic Growth in Emerging Economies (ICTM 2012)*, Wroclaw, Poland, September 17-18, 2012, pp. 17-26.

50. "Business Competency of IT Professionals and Job Satisfaction in Transition Economies: Insights from Poland," with Jolanta Kowal. *Proceedings of the 18th Americas Conference on Information Systems (AMCIS 2012)*, Seattle, Washington August 9-11, 2012.
49. "Stock Market Reaction to Information Technology Investment Announcements in the USA and Poland: A Comparative Event Study." *Proceedings of the 45th Hawaii International Conference on System Sciences (HICSS-2012)*, January 4-7, 2012, Grand Wailea, Maui, Hawaii.
48. "Solution Based Procedures to Determine Business Models of Enterprise Systems Providers," with Katja Andresen and Carsten Brockmann. *Proceedings of the 45th Hawaii International Conference on System Sciences (HICSS-2012)*, January 4-7, 2012, Grand Wailea, Maui, Hawaii.
47. "Global Knowledge-Intensive Business Process: Extending the Boundaries of Business Process Management," with Olivera Marjanovic. *Proceedings of the Seventeenth Americas Conference on Information Systems (AMCIS 2011)*, Detroit, Michigan August 4-7, 2011.
46. "Business Models for Enterprise System Providers: Towards the Solution Based Procedure," with Katja Andresen and Carsten Brockmann. *Proceedings of the Seventeenth Americas Conference on Information Systems (AMCIS 2011)*, Detroit, Michigan August 4-7, 2011.
45. "Event Studies in Information Systems Research: Past, Present and Future," with Heinz Roland Weistroffer. *Proceedings of the 19th European Conference on Information Systems (ECIS 2011)*, Helsinki, Finland, June 9-11, 2011.
44. "Market Reactions to Investments in Information Technology: Insight from Warsaw Stock Exchange," with Dorota Dobija, Karol Klimczak and Heinz Roland Weistroffer. *Proceedings of the Sixteenth Americas Conference on Information Systems (AMCIS 2010)*, Lima, Peru, August 12-15, 2010.
43. "Adoption and Use of Information Technology in Mandatory Settings: Preliminary Insights from Saudi Arabia," with Ibrahim M. Al-Jabri. *Proceedings of the Sixteenth Americas Conference on Information Systems (AMCIS 2010)*, Lima, Peru, August 12-15, 2010.
42. "Digital Cross-Organizational Collaboration: A Metatriangulation Review," with Maria Madlberger. *Proceedings of the 43 Hawaii International Conference on System Sciences (HICSS 2010)*, Kauai, Hawaii, January 5-8, 2010.
41. "Digital Cross-Organizational Collaboration: Towards a Preliminary Framework" with Maria Madlberger. *Proceedings of the Fifteenth Americas Conference on Information Systems (AMCIS 2009)*, San Francisco, California, August 6-9, 2009.

40. "Event Studies in Information Systems Research: An Updated Review," with Heinz Roland Weistroffer. *Proceedings of the Fifteenth Americas Conference on Information Systems (AMCIS 2009)*, San Francisco, California, August 6-9, 2009.
39. "Information and Communications Technology in Developing, Emerging and Transition Economies: An Assessment of Research," with Heinz Roland Weistroffer. *Proceedings of the Fifteenth Americas Conference on Information Systems (AMCIS 2009)*, San Francisco, California, August 6-9, 2009.
38. "Stock Market Reaction to Information Technology Investments: Towards an Explanatory Model," with Heinz Roland Weistroffer, *Proceedings of the the 17th European Conference on Information Systems (ECIS 2009)*, Verona, Italy, June 8-10, 2009.
37. "Digital Cross-Organizational and Cross-Border Collaboration: A Scientometric Study," with Maria Madlberger, *Proceedings of the 42 Hawaii International Conference on System Sciences (HICSS 2009)*, Big Island, Hawaii, January 5-8, 2009.
36. "Cross-Organizational and Cross-Border IS/IT Collaboration: A Literature Review," with Maria Madlberger, *Proceedings of the Fourteen Americas Conference on Information Systems (AMCIS 2008)*, Toronto, Ontario, Canada, August 14th-17th, 2008.
35. "Event Studies in Information Systems Research: A Review," with Heinz Roland Weistroffer, *Proceedings of the Fourteen Americas Conference on Information Systems (AMCIS 2008)*, Toronto, Ontario, Canada, August 14th-17th, 2008.
34. "Stock Price Reactions to Investments in EAI and ERP: A Comparative Event Study" with Heinz Roland Weistroffer, *Proceedings of the 41 Hawaii International Conference on System Sciences (HICSS 2008)*, Big Island, Hawaii, January 7-10, 2008.
33. "IS/IT in Developing and Emerging Economies," with H. Roland Weistroffer, Sonali Morar, and Syed Nasirin, *Proceedings of the Thirteen Americas Conference on Information Systems (AMCIS 2007)*, Keystone, Colorado, August 09th-12th 2007.
32. "Cross-Organizational and Cross-Border IS/IT Collaboration: Mini-Track Introduction," with Nicholas Romano, Jr. and James Pick, *Proceedings of the Thirteen Americas Conference on Information Systems (AMCIS 2007)*, Keystone, Colorado August 09th-12th 2007.
31. "Identifying Success Factors for Information Technology Investments: Contribution of Activity Based Costing," with Heinz Roland Weistroffer, *Proceedings of 15th European Conference on Information Systems (ECIS 2007)*, St. Gallen, Switzerland, June 7-9, 2007, pp. 1031-1040.
30. "Financial Performance of Internet and Brick-and-Mortar Companies – A Comparative Analysis," with Myung Ko, *Proceedings of the 18th Information Resource Management*

Association (IRMA 2007), Vancouver, British Columbia, Canada, May 19-23, 2007, pp. 426-429.

29. "How Do Investments in Enterprise Application Integration Drive Stock Prices?" with Heinz Roland Weistroffer, *Proceedings of the 40 Hawaii International Conference on System Sciences (HICSS 2007)*, Big Island, Hawaii, January 3-6, 2007.

28. "Enterprise Application Integration and its Effect on Business Value: A Stock Market View," with Heinz Roland Weistroffer, *Proceedings of the Twelfth Americas Conference on Information Systems (AMCIS 2006) Conference*, Acapulco, México, August 4-6, 2006, pp. 506-511.

27. "A Framework for IT Investment Evaluation in Emerging Economies," with Heinz Roland Weistroffer. *Proceedings of the Eleventh Americas Conference on Information Systems (AMCIS 2005) Conference*, Omaha, Nebraska, August 11-14, 2005, pp. 742-748.

26. "The Effect of Stakeholder Consideration in IT Investment Evaluation on Business Value: Evidence from Sweden," with Elisabeth Frisk. *Proceedings of the Eleventh Americas Conference on Information Systems (AMCIS 2005) Conference*, Omaha, Nebraska, August 11-14, 2005, pp. 308-314.

25. "Fuzzy Logic Value Chain Analysis: Information Technology Investment Evaluation in Emerging Economies," with Heinz Roland Weistroffer. *Proceedings of the ISOneWorld2005 Conference*, Las Vegas, Nevada, March 30-April 1, 2005.

24. "Information Technology Investment Announcements and the Stock Price Reaction: The Case of Japan," with Kaori Takeuchi. *Proceedings of the 12th American Society of Business and Behavioral Sciences (ASBBS) Annual Conference*, Las Vegas, NV, February 24-27, 2005, pp.1652-1658.

23. "A Framework for Evaluating Information Technology Investments Using Value Chain Analysis," with Heinz Roland Weistroffer. *Proceedings of the 2004 Annual Decision Sciences Institute (DSI) Meeting*, Boston, MA, November 20-23, 2004, pp. 3061-3066.

22. "The Impact of Information Technology Investments and Cost Management Systems on Stock Price Reaction," with Heinz Roland Weistroffer. *Proceeding of the 2004 European Conference on Information Technology Evaluation (ECITE 2004)*, Amsterdam, Netherlands, November 11-12, 2004, pp. 525-529.

21. "Using Activity-Based Costing for Evaluating Information Technology Related Investments in Emerging Economies: A Framework," with Heinz Roland Weistroffer. *Proceedings of the 2004 Americas Conference on Information Systems (AMCIS 2004)*, New York, August 6-8, 2004, pp. 642-645.

20. "IT Investments in Developing Countries: Mini-Track Introduction," with James Pick and Carlos Navarrete. *Proceedings of the 2004 Americas Conference on Information Systems (AMCIS 2004)*, New York, August 6-8, 2004, pp. 664-665.
19. "Activity-Based Management for E-Commerce." Refereed paper presented at the pre-International Conference on Information Systems (ICIS 2003) workshop entitled "The Second Workshop on e-Business" (WeB 2003) in Seattle, WA (December 13-14, 2003). Published in the *Web 2003 Conference Proceedings*, pp. 121-129.
18. "The Use of Web-Based Surveys for Academic Research: Lessons Learned from the Field." *Proceedings of the 2003 Annual Decision Sciences Institute (DSI) Meeting*, Washington, DC, November 22-25, 2003.
17. "An Exploratory Study of the Impact of Information Technology Announcements on Companies' Values in Japan," with Atsuko Imai. *Proceedings of the 2003 Americas Conference on Information Systems (AMCIS 2003)*, Tampa, FL, August 4-6, 2003, pp.1480-1487.
16. "Adoption and Implementation of Activity-Based Costing: A Web-Based Survey," with Sally M. Schultz. *Proceedings of the 12th Annual Industrial Engineering Research Conference (IERC 2003)*, Portland, OR, May 18-20, 2003.
15. "Is the Applicability of Web-Based Surveys for Academic Research limited to the Field of Information Technology?" with Nawal Ait Lahri. *Proceedings of the 36 Hawaii International Conference on System Sciences (HICSS 2003)*, Big Island, HI, January 6-9, 2003.
14. "The Use of Web-Based Surveys for Academic Research in the Field of Engineering," with Shona D. Morgan. *Proceedings from the 2002 American Society of Engineering Management (ASEM) National Conference*, Tampa, FL, October 2-5, 2002, pp. 33-38.
13. "Using Internet-Based Surveys for Academic Research: Opportunities and Problems." *Proceedings of the 2001 American Society of Engineering Management (ASEM) National Conference*, Huntsville, AL, October 11-13, 2001, pp. 290-295.
12. "Using the Integrated Activity-Based Costing and Economic Value Added Information System for Project Management." *Proceedings of the 2001 Americas Conference on Information Systems (AMCIS 2001)*, Boston, MA, August 2-5, 2001.
11. "Activity-Based Costing for E-Business." *Proceedings of the PICMET Conference "Technology Management in the Knowledge Era: Life in the e-Word"*, Portland, OR, July 29 – August 2, 2001.
10. "Activity-Based Costing for E-Commerce." *Proceedings of the 10th Annual Industrial Engineering Research Conference (IERC 2001)*, Dallas, TX, May 20-22, 2001.

9. "The Integrated Activity-Based Costing and Economic Value Added System for the Service Sector." *Proceedings of the International Research Conference on Service Management*, LARGO, University of Angers, France, March 22-23, 2001, pp.387-397.
8. "Variation in Production Volume: The Impact of Using an Integrated ABC-and-EVA System to Reduce Distortions in Product Costs," with Kim LaScola Needy. *Proceedings of the 2000 American Society of Engineering Management (ASEM) National Conference*, Washington, DC, October 5-7, 2000, pp. 341-346.
7. "The Integrated Activity-Based Costing and Economic Value Added System as a Strategic Management Tool: A Field Study." *Proceedings from the 2000 Pacific Conference on Manufacturing*, Southfield-Detroit, MI, September 6-8, 2000, pp. 84-89.
6. "Implementing an Integrated Activity-Based Costing and Economic Value Added System: A Case Study." *Proceedings of the 9th Annual Industrial Engineering Research Conference (IERC 2000)*, Cleveland, OH, May 22-24, 2000.
5. "The Integrated Activity-Based Costing and Economic Value Added Information System." *Proceedings from the Society for Advancement of Management (SAM) 2000 International Management Conference*, St. Augustine, FL, March 30 –April, 2000.
4. "A Procedure for Smooth Implementation of Activity-Based Costing in Small Companies," with Jorge F. Valenzuela, Jose D. Porter, Robin M. Monk and Kim LaScola Needy. *Proceedings of the 1999 American Society of Engineering Management (ASEM) National Conference*, Virginia Beach, VA, October 21-23, 1999, pp. 279-288.
3. "How to Design and Implement an Integrated Activity-Based Costing and Economic Value Added System" with Kim LaScola Needy. *Proceedings of the 8th Annual Industrial Engineering Research Conference (IERC 1999)*, Phoenix, AZ, May 23-25, 1999.
2. "EVA for Small Manufacturing Companies," with Kim LaScola Needy. *Proceedings of the Society for Advancement of Management (SAM) International Management Conference*, Las Vegas, NV, March 28-30, 1999, pp. 461-469.
1. "An Integrated Activity-Based Costing and Economic Value Added System as an Engineering Management Tool for Manufacturers," with Kim LaScola Needy. *Proceedings of the 1998 American Society of Engineering Management (ASEM) National Conference*, Virginia Beach, VA, October 1-3, 1998, pp. 77-84.

Conference Presentations and Non-Referred Conference Proceedings (13)

13. "Towards a Model for Successful Information Technology Investments: Insights from Event Studies," with Heinz Roland Weistroffer, research paper, research-in-progress poster presentation at the International Conference on Information Systems (ICIS 2007), Montréal, Québec, Canada, December 9-12, 2007.

12. "Information Technology Investment Evaluation for Emerging Economies: Tools and A General Framework," with Heinz Roland Weistroffer, symposium research paper presented at the 2007 Hawaii International Conference on System Sciences (HICSS-40), Big Island, Hawaii, January 3-6, 2007.
11. "Event Studies in Information Technology Research: Potential and Pitfalls," with Roland Weistroffer. Research paper presented at the International Symposium Research Methods at the International Conference on Information Systems (ICIS 2005).
10. "Information and Communication Technology Investments in Emerging Economies: Case of Indian Offshoring Companies," with Kanwalroop Dhanda and Rajesh Tyagi. Research paper presented at the 36th Annual Meeting of the Decision Sciences Institute (DSI) Meeting, to be held in San Francisco from November 19-23, 2005.
9. "Valuing Information Technology Investments Using Fuzzy Logic," research paper presented at the 13th Annual Industrial Engineering Research Conference (IERC 2004), Houston, TX, May 15-19, 2004.
8. "Diffusion of Activity-Based Costing: New Evidence from the Field," Research paper presented at the 13th Annual Industrial Engineering Research Conference (IERC 2004), Houston, TX, May 15-19, 2004.
7. "The Impact of the Cost Management System on the Business Value of Information Technology." Research paper presented at the 2004 American Society of Business and Behavioral Sciences (ASBBS) Conference (February 19-23, 2004), Las Vegas, Nevada.
6. "The Impact of Information Technology Investment Announcements on the Market Value of Firms in Japan," with Atsuko Imai. Interactive research paper presentation at the 2003 Academy of Management Conference, Seattle, WA, August 1-6, 2003.
5. "Web-Based Surveys as an Academic Research Tool in Engineering," with Shona D. Morgan. Presentation at the 2003 Institute of Industrial Engineers (IIE) Annual Research Conference, Portland, OR, May 17-21, 2003.
4. "Global Adoption of Activity-Based Costing and Economic Value Added," with Joan Hollister and Sally M. Schultz. Presentation at the 2003 American Society of Business and Behavioral Sciences (ASBBS) Annual Conference, Las Vegas, NV, February 20-23, 2003.
3. "An International Comparison of the Use of Cost Management and Financial Tools," with Joan Hollister and Sally M. Schultz. 2002 American Academy of Accounting and Finance (AAAF) Conference, New Orleans, Louisiana, December 5-7, 2002.
2. "Successfully Managing an E-Business by Applying the Theory of Constraints." Presentation at the 2002 Institute of Industrial Engineers (IIE) Annual Research Conference, Orlando, FL, May 19-22, 2002

1. “An Integrated Activity-Based Costing & Economic Value Added System for Small Manufacturing Firms,” with Kim LaScola Needy. Presentation at the INFORMS National Meeting, Cincinnati, Ohio, May 2-5, 1999.

Other Publications (1)

“EVA for Small Manufacturing Companies,” with Kim LaScola Needy. *Fiducial Link*, Volume 1 Issue 4 (November-December 2000), pp. 4-5, 11.

Workshops, Panels, and other Presentations

Workshops

“The Integrated ABC-and-EVA System.” One day workshop during the VI International Conference on Industrial Engineering, São Paulo, Brazil, October 29 – November 2, 2000.

Panels

“Publishing Panel.” A panel on academic publishing, with Steve Jones (Conwy Borough Council, UK), Ken Peffers (University of Las Vegas), and Omar El Sawy (University of Southern California), at ISOneWorld2005 Conference, Las Vegas, Nevada, March 30-April 1, 2005.

“Grand Challenges in Information Systems Research.” A plenary panel, with Kevin C. Desouza (University of Illinois at Chicago), Merrill Warkentin (Mississippi State University), and Andrew Wenn (Victoria University, Australia), at ISOneWorld2005 Conference, Las Vegas, Nevada, March 30-April 1, 2005.

Other Presentations

“Competitive Strategies.” A Round-table discussion, with Prof. Ken Platts (University of Cambridge, UK) and Prof. Jeet Gupta (Ball State University, USA), at the VI International Conference on Industrial Engineering, São Paulo, Brazil, October 29 – November 2, 2000.

Service

University-Wide Committees

Member, Committee on Research, Awards and Leaves (CRAL), Fall 2014 – Present

Member, Graduate Council, Fall 2007 – Spring 2013

Member, Institutional Review Board, March 2001 – March 2007

Member, Economic Faculty Search Committee, Fall 1999 – Spring 2000

School of Business Committees

Chair, the Personnel Committee, Fall 2014 – Spring 2015

Member, School of Business MBA Assessment Committee, Fall 2012 – Present

Member, the Personnel Committee, Spring 2003, Fall 2006 – Spring 2007, Fall 2013 – Present

Chair, School of Business MBA Assessment Committee, Fall 2010 – Spring 2012

Member, School of Business Faculty Development Committee, Fall 2008 – Spring 2010

Member, School of Business Curriculum Committee, Fall 2001 – Spring 2008
Faculty Member, Business Advisory Council, Fall 1999 - Present
Member, Business Decision Support Systems / Operations Management Faculty Search Committee, Fall 2002 – Spring 2003
Chair, Business Decision Support Systems / Operations Management Faculty Search Committee, Fall 2001
Co-Chair, Technology Committee, Fall 2000 – Spring 2001
Member, Business Decision Support Systems / Operations Management Faculty Search Committee, Fall 2000 – Spring 2001
Member, Technology Committee, Fall 1999 - Spring 2000
Member, International Business Faculty Search Committee, Fall 1999 – Spring 2000

Academic Advising

Advise undergraduate students (12 advises as of Spring 2023)

Professional Service

Editor, Guest Editor, Special Issue Editor

Editorial Review Board of the *Journal of Global Technology Management (JGITM)*.

Senior Editor for the *Journal Information Technology for Development (ITD)*.

Senior Editor for the *Journal Information Systems Management (ISM)*.

Guest Co-Editor for the Special Issue of *Information Systems Management* with Prof. Heinz Roland Weistroffer (Virginia Commonwealth University). Special Issue titled “Information Technology in Transition Economies,” Vol. 28, No. 3 (2011).

Guest Co-Editor for the Special Issue of the *Journal Information Technology for Development (ITD)* with Prof. Heinz Roland Weistroffer (Virginia Commonwealth University). Special Issue titled “Information Technology Success Factors and Models in Developing and Emerging Economies” Vol. 17, No. 3 (2011).

Guest Co-Editor for the Special Issue of *European Journal of Information Systems (EJIS)* with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands). Special Issue titled “Cross-Border and Cross-Organizational Collaboration,” Vol. 19, No. 2 (2010).

Guest Co-Editor for the Special Issue of the *International Journal of E-Collaboration (IJeC)* with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands). Special Issues titled “Collaboration Issues in Cross-Organizational and Cross-Border IS/IT,” Vol. 5, Issue 1 and Issue 2 (2009).

Guest Co-Editor for the Special Issue of the *Journal of Global Information Technology Management (JGITM)* with Prof. Heinz Roland Weistroffer (Virginia Commonwealth

University). Special Issue titled “Information Technology in Transition Economies,” Vol. 11, No. 4 (2008).

Guest Co-Editor for the Special Issue of the Journal *Information Technology for Development (ITD)* with Prof. Heinz Roland Weistroffer (Virginia Commonwealth University). Special Issue titled “Information Technology Investments in Emerging Economies,” Vol. 14, No. 1 (2008).

Guest Co-Editor for the Special Issue of the *Journal of Information Technology Theory and Application (JITTA)* with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands). Special Issue titled “Collaboration Issues in Cross-Organizational and Cross-Border IS/IT,” Vol. 8 No. 4 (2007).

Guest Co-Editor for *Journal of Information Science and Technology (JIST)* with James Pick (University of Redlands). Special Issue titled “IT Investments in Emerging Economies,” Vol. 2, No. 4 (2005).

Guest Co-Editor for the *Electronic Journal of Information Systems in Developing Countries (EJISDC)* with James Pick (University of Redlands) and Carlos Navarrete (California State Polytechnic University). Special Section titled “IT Investments in Developing Countries,” Vol. 19 (October 2004).

Managing Editor for the *Journal of Information Science and Technology (JIST)* 2005-2007.

Associate Editor for the International Conference on Information Systems (ICIS 2009) track entitled “Economics and Information Systems” (Track Chairs were Eric van Heck, Erasmus University, Netherlands, Bruce Weber, London Business School, United Kingdom and D.J. Wu, Georgia Tech, USA), Phoenix, AZ, December 15-18, 2009.

Associate Editor for the International Conference on Information Systems (ICIS 2008) track entitled “New Directions in IS Research” (Track Chairs were Samer Farai, McGill University, Canada and Walter Beats, Euromed Marseille Ecole de Management, France), Paris, France, December 14-17, 2008.

Associate Editor for the International Conference on Information Systems (ICIS 2007) track entitled “New Directions in IS Research” (Track Chairs were Sid Huff, Victoria University of Wellington, New Zealand and Hock-Hai Teo, NUS, Singapore), Montréal, Québec, Canada, December 9-12, 2007.

Associate Editor for the International Conference on Information Systems (ICIS 2006) track entitled “New Directions in IS Research” (Track Chairs were Zahir Irani and Raymond Hackney, Brunel University, UK), Milwaukee, WI, December 10-13, 2006.

Associate Editor for the International Conference on Information Systems (ICIS 2005) track entitled “New Directions in IS Research” (Track Chairs were Ken Peffers, University of

Nevada, Las Vegas and Robert Davison, City University of Hong Kong), Las Vegas, NV, December 11-14, 2005.

Reviewer for Refereed Journals

Reviewer for the *MIS Quarterly (MISQ)*

Reviewer for the *Journal of Management Information Systems (JMIS)*

Reviewer for the *European Journal of Information Systems (EJIS)*

Reviewer for the *Decision Support Systems (DSS)*

Reviewer for the *International Journal of Information Management (IJIM)*

Reviewer for the *Journal of Electronic Commerce Research (JECR)*

Reviewer for the *International Journal of Knowledge Management Studies (IJKMS)*

Reviewer for the *International Journal of E-Collaboration (IJeC)*

Reviewer for the *Engineering Economist (EE)*

Reviewer for the *Management Research News (MRN)*

Track Chair/Mini-Track Chair

Track Chair, with Prof. Janice Sipior (Villanova University) and Professor Renata Gabryelczyk, of the track entitled “ICTs in Global Development (SIGGlobDev)” at the 24th Americas Conference on Information Systems (AMCIS 2018), New Orleans, LA, August 16-18, 2018.

Track Chair, with Prof. Janice Sipior (Villanova University) and Professor Renata Gabryelczyk, of the track entitled “ICTs in Global Development (SIGGlobDev)” at the 23th Americas Conference on Information Systems (AMCIS 2017), Boston, MA, August 10-12, 2017.

Track Chair, with Prof. Piotr Soja (Cracow University of Economics), of the track entitled “ICTs in Global Development (SIGGlobDev)” at the 22nd Americas Conference on Information Systems (AMCIS 2016), San Diego, CA, August 11-13, 2016.

Track Chair, with Prof. H. Roland Weistroffer (Virginia Commonwealth University) and Prof. Piotr Soja (Cracow University of Economics), of the track entitled “ICTs in Global Development (SIGGlobDev)” at the 21th Americas Conference on Information Systems (AMCIS 2015), Puerto Rico, August 13-15, 2015.

Track Chair, with Prof. H. Roland Weistroffer (Virginia Commonwealth University), of the track entitled “ICTs in Global Development (SIGGlobDev)” at the 20th Americas Conference on Information Systems (AMCIS 2014), Savannah, Georgia, August 9-11, 2014.

Track Chair, with Prof. H. Roland Weistroffer (Virginia Commonwealth University), of the track entitled “ICTs in Global Development (SIGGlobDev)” at the Nineteenth Americas Conference on Information Systems (AMCIS 2013), Chicago, Illinois, August 14-15, 2013.

Track Chair, with Prof. H. Roland Weistroffer (Virginia Commonwealth University), of the track entitled “ICTs in Global Development (SIGGlobDev)” at the Eighteen Americas

Conference on Information Systems (AMCIS 2012), Seattle, Washington, August 9-12, 2012.

Track Chair, with Prof. H. Roland Weistroffer (Virginia Commonwealth University), of the track entitled “ICTs in Global Development (SIGGlobDev)” at the Sixteenth Americas Conference on Information Systems (AMCIS 2010), Lima, Peru, August 12-15, 2010.

Track Chair, with Prof. H. Roland Weistroffer (Virginia Commonwealth University), of the track entitled “ICTs in Global Development (SIGGlobDev)” at the Fifteenth Americas Conference on Information Systems (AMCIS 2009), San Francisco, California, August 6-9, 2009.

Mini-Track Chair, with Prof. Mehruz Kamal (State University of New York at Brockport) and Prof. Sajda Qureshi (University of Nebraska at Omaha), of the mini-track entitled “Information Technology for Development” at the 46 Hawaii International Conference on System Sciences (HICSS 2013), Grand Wailea, Maui, Hawaii, January 7-10, 2013.

Mini-Track Chair, with Carsten Brockmann (University of Potsdam), of the mini-track entitled “Knowledge Economics” at the 46 Hawaii International Conference on System Sciences (HICSS 2013), Grand Wailea, Maui, Hawaii, January 7-10, 2013.

Mini-Track Chair, with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands), of the mini-track entitled “Collaboration Issues in Cross-Organizational and Cross-Border IS/IT” at the 45 Hawaii International Conference on System Sciences (HICSS 2012), Grand Wailea, Maui, Hawaii, January 4-7, 2012.

Mini-Track Chair, with Carsten Brockmann (University of Potsdam), of the mini-track entitled “Economics of Knowledge Management and Transfer” at the 45 Hawaii International Conference on System Sciences (HICSS 2012), Grand Wailea, Maui, Hawaii, January 4-7, 2012.

Mini-Track Chair, with Prof. Mehruz Kamal (State University of New York at Brockport) and Prof. Sajda Qureshi (University of Nebraska at Omaha), of the mini-track entitled “Information Technology for Development” at the 45 Hawaii International Conference on System Sciences (HICSS 2012), Grand Wailea, Maui, Hawaii, January 4-7, 2012.

Mini-Track Chair, with Prof. Karine Barzilai-Nahon (University of Washington), of the mini-track entitled “Digital Divide/s and Inclusion/s” at the 44 Hawaii International Conference on System Sciences (HICSS 2011), Kauai, Hawaii, January 4-7, 2011.

Mini-Track Chair, with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands), of the mini-track entitled “Collaboration Issues in Cross-Organizational and Cross-Border IS/IT” at the 44 Hawaii International Conference on System Sciences (HICSS 2011), Kauai, Hawaii, January 4-7, 2011.

Mini-Track Chair, with Katja Andressen (Technical University of Applied Science Berlin), Piotr Soja (Cracow University of Economics) and Carsten Brockmann (University of Potsdam), of the mini-track entitled “Enterprise Systems Adoption and Business Models” the Seventeenth Americas Conference on Information Systems, Detroit, Michigan August 4-7, 2011.

Mini-Track Chair, with Prof. Karine Barzilai-Nahon (University of Washington), of the mini-track entitled “Digital Divide/s and Inclusion/s” at the 43 Hawaii International Conference on System Sciences (HICSS 2010), Kauai, Hawaii, January 5-8, 2010.

Mini-Track Chair, with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands), of the mini-track entitled “Collaboration Issues in Cross-Organizational and Cross-Border IS/IT” at 43 Hawaii International Conference on System Sciences (HICSS 2010), Kauai, Hawaii, January 5-8, 2010.

Mini-Track Chair, with Prof. H. Roland Weistroffer (Virginia Commonwealth University), of the mini-track entitled “IT in Emerging and Transition Economies” at the Fifteenth Americas Conference on Information Systems (AMCIS 2009), San Francisco, California, August 6-9, 2009.

Mini-Track Chair, with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands), of the mini-track entitled “Collaboration Issues in Cross-Organizational and Cross-Border IS/IT” the Fifteenth Americas Conference on Information Systems (AMCIS 2009), San Francisco, California, August 6-9, 2009.

Mini-Track Chair, with Prof. Piotr Soja (Cracow University of Economics), of the mini-track entitled “Enterprise Systems: Determinants of Successful Adoption and Use” the Fifteenth Americas Conference on Information Systems (AMCIS 2009), San Francisco, California, August 6-9, 2009.

Mini-Track Chair, with Katja Andressen (Technical University of Applied Science Berlin), Piotr Soja (Cracow University of Economics) and Chris von Bogdandy (Ulixes Consulting), of the mini-track entitled “Enterprise Systems Adoption and Business Models” the Fifteenth Americas Conference on Information Systems (AMCIS 2009), San Francisco, California, August 6-9, 2009.

Mini-Track Chair, with Prof. Karine Barzilai-Nahon (University of Washington), of the mini-track entitled “Digital Divide/s and Inclusion/s” at the 2009 Hawaii International Conference on System Sciences (HICSS-42), Big Island, Hawaii, January 5-8, 2009.

Mini-Track Chair, with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands), of the mini-track entitled “Collaboration Issues in Cross-Organizational and Cross-Border IS/IT” at the 2009 Hawaii International Conference on System Sciences (HICSS-42), Big Island, Hawaii, January 5-8, 2009.

Mini-Track Chair, with Prof. H. Roland Weistroffer (Virginia Commonwealth University), of the track entitled “IT in Emerging and Transition Economies” at the 2008 Americas Conference on Information Systems (AMCIS 2008), Toronto, Ontario, Canada, August 14-17, 2008.

Mini-Track Chair, with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands), of the mini-track entitled “Collaboration Issues in Cross-Organizational and Cross-Border IS/IT” at the 2008 Americas Conference on Information Systems (AMCIS 2008), Toronto, Ontario, Canada, August 14-17, 2008.

Mini-Track Chair, with Prof. H. Roland Weistroffer (Virginia Commonwealth University), of the track entitled “Decision Support for Portfolio Selection” at the 2008 Americas Conference on Information Systems (AMCIS 2008), Toronto, Ontario, Canada, August 14-17, 2008.

Mini-Track Chair, with Prof. Karine Barzilai-Nahon (University of Washington), of the mini-track entitled “Digital Divide” at the 2008 Hawaii International Conference on System Sciences (HICSS-41), Big Island, Hawaii, January 7-10, 2008.

Mini-Track Chair, with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands), of the mini-track entitled “Collaboration Issues in Cross-Organizational and Cross-Border IS/IT” at the 2008 Hawaii International Conference on System Sciences (HICSS-41), Big Island, Hawaii, January 7-10, 2008.

Mini-Track Chair, with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands), of the mini-track entitled “Collaboration Issues in Cross-Organizational and Cross-Border IS/IT” at the 2007 Americas Conference on Information Systems (AMCIS 2007), Keystone, Colorado, August 9-12, 2007.

Mini-Track Chair, with Prof. Syed Nasirin (Brunel University), Prof. Sonali Morar (Brunel University) and Prof. H. Roland Weistroffer (Virginia Commonwealth University), of the track entitled “IS/IT in Developing and Emerging Economies” at the 2007 Americas Conference on Information Systems (AMCIS 2007), Keystone, Colorado, August 9-12, 2007.

Mini-Track Chair, with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands), of the mini-track entitled “Collaboration Issues in Cross-Organizational and Cross-Border IS/IT” at the 2007 Hawaii International Conference on System Sciences (HICSS-40), Big Island, Hawaii, January 3-6, 2007.

Mini-Track Chair, with Prof. H. Roland Weistroffer (Virginia Commonwealth University), of the track entitled “IT Investments in Emerging Economies” at the 2006 Americas Conference on Information Systems (AMCIS 2006), Acapulco, México, August 4-6, 2006.

Mini-Track Chair, with Prof. Nicholas Romano, Jr. (Oklahoma State University) and Prof. James Pick (University of Redlands), of the mini-track entitled “Collaboration Issues in

Cross-Organizational and Cross-Border IS/IT” at the 2006 Hawaii International Conference on System Sciences (HICSS-39), Kauai, Hawaii, January 4-7, 2006.

Mini-Track Chair, with Prof. James Pick (University of Redlands) and Prof. Carlos Navarrete (California State Polytechnic University), of the track entitled “IT Investments in Emerging Economies” at the 2005 Americas Conference on Information Systems (AMCIS 2005), Omaha, Nebraska, August 11-14, 2005.

Track Chair, with Prof. James Pick (University of Redlands) and Prof. Carlos Navarrete (California State Polytechnic University), of the track entitled “IT Investments in Emerging Economies” at the ISOneWorld2005 Conference, Las Vegas, Nevada, March 30-April 1, 2005.

Mini-Track Chair, with Prof. James Pick (University of Redlands) and Prof. Carlos Navarrete (California State Polytechnic University), of the track entitled “IT Investments in Developing Countries” at the 2004 Americas Conference on Information Systems (AMCIS 2004), New York, August 6-8, 2004.

External Reviewer

University of Cape Town, Rondebosch, South Africa, Ph.D. Thesis Examination, 2012
University of Texas, El Paso, Tenure and Promotion to Associate Professor, 2005.

Conference Committee Member, Session Chair, Reviewer, and Discussant

Member of the Senior Program Committee of the 14th International Conference on Enterprise Information Systems (ICEIS 2012), Wrocław, Poland, June 28-July 1, 2012.

Member of the Senior Program Committee of the 13th International Conference on Enterprise Information Systems (ICEIS 2011), Beijing, China, June 8-11, 2011.

Member of the Senior Program Committee of the 12th International Conference on Enterprise Information Systems (ICEIS), Funchal, Madeira - Portugal, June 8-12, 2010.

Member of the Senior Program Committee of the 11th International Conference on Enterprise Information Systems (ICEIS), Milan, Italy, May 6-10, 2009.

Member of the Senior Program Committee of the 10th International Conference on Enterprise Information Systems (ICEIS), Barcelona, Spain, June 12-16, 2008.

Member of the Program Committee for 11th International Conference on Business Information Systems (BIS 2008), Innsbruck, Austria, May 5-7, 2008.

Member of the Program Committee for the 8th Annual World Congress on the Management of e-Business, Toronto, Ontario, Canada, July 11-13, 2007.

Member of the Program Committee for 10th International Conference on Business Information Systems (BIS 2007), Poznan, Poland, April 25-27, 2007.

Member of the Senior Program Committee of the 9th International Conference on Enterprise Information Systems (ICEIS), Funchal, Madeira, Portugal, June 12-16, 2007.

Member of the Program Committee for the Second Association of Information Systems (AIS SIGAND) European Symposium on Systems Analysis and Design, University of Gdańsk, Poland, June 5, 2007.

Reviewer for the 2007 Hawaii International Conference on System Sciences (HICSS-40), Big Island, Hawaii, January 3-6, 2007.

Reviewer for the International Conference on Information Systems (ICIS 2006), Milwaukee, WI, December 10-13, 2006.

Member of the Program Committee for the IADIS International Conference “e-Commerce 2006,” Barcelona, Spain, December 9-11, 2006.

Member of the Program Committee of the European Conference on Information Technology Evaluation (ECITE 2006), Genoa, Italy, September 28-29, 2006.

Reviewer for the 2006 Academy of Management (AOM) Conference, Atlanta, GA, August 11-16, 2006. (AOM Technology and Innovation Management (TIM) Division and AOM Organization Communication and Information Systems (OCIS) Division).

Member of the Program Committee of the 6th International Business Information Management (IBIMA 2006) Conference, Bonn, Germany, June 19-21, 2006.

Reviewer for the 14th European Conference on Information Systems (ECIS 2006), Göteborg, Sweden, June 12-14, 2006.

Member of the Senior Program Committee of the 8th International Conference on Enterprise Information Systems (ICEIS), Paphos, Cyprus, May 23-27, 2006.

Member of the Program Committee of the ISOneWorld2006 Conference, Las Vegas, Nevada, April 19-21, 2006.

Reviewer for the 2005 Americas Conference on Information Systems (AMCIS 2005), Omaha, Nebraska, August 11-14, 2005.

Member of the Program Committee of the fifth International Conference on eBusiness, eCommerce and eGovernment (I3E'2005), Poznan, Poland, October 26-28, 2005.

Program Committee of the 2nd International Conference on E-Business and Telecommunication Networks (ICETE), Readings, UK, October 3-7, 2005.

Member of the Program Committee of the European Conference on Information Technology Evaluation (ECITE 2005), Turku, Finland, September 28-29, 2005.

Reviewer for the 2005 Academy of Management (AOM) Conference, Honolulu, HI, August 5-10, 2005. (AOM Technology and Innovation Management (TIM) Division and AOM Organization Communication and Information Systems (OCIS) Division).

Member of the Program Committee of the International Business Information Management (IBIMA 2005) Conference, Lisbon, Portugal, July 5-7, 2005.

Member of the Program Committee and Reviewer for the IADIS International Conference “e-Society 2005,” Quwra, Malta, June 27-30, 2005.

Member of the Program Committee of the 16th Information Resources Management Association (IRMA) 2005 International Conference, San Diego, CA, May 15-18, 2005.

Member of the Program Committee of the 7th International Conference on Enterprise Information Systems (ICEIS), Miami, Florida, May 24-28, 2005.

Reviewer and Member of the Program Committee of the ISOneWorld2005 Conference, Las Vegas, Nevada, March 30-April 1, 2005.

Reviewer for the 2005 Hawaii International Conference on System Sciences (HICSS 2005), Big Island, HI, January 3-6, 2005.

Member of the Program Committee of the 3rd International Business Information Management (IBIMA) Conference, Cozumel, Mexico, December 14-16, 2004.

Reviewer for the 2004 International Conference on Information Systems (ICIS 2004), Washington, DC, December 12-15, 2004.

Session Chair at the 2004 Annual Decision Sciences Institute (DSI) Meeting, Boston, MA, November 20-23, 2004. Session entitled “Financial & Performance Assessments.”

Reviewer for the 2004 Annual Decision Sciences Institute (DSI) Meeting, Boston, MA, November 20-23, 2004.

Reviewer for the 2004 International Research Conference on Innovations in Information Technology (IIT), Dubai, UAE, October 4-6, 2004.

Reviewer for the 2004 Americas Conference on Information Systems (AMCIS 2004), New York, August 6-8, 2004.

Reviewer for the 2004 Academy of Management Conference, New Orleans, LA, August 6-11, 2004. (AOM Technology and Innovation Management (TIM) Division).

Program Committee of the 1st International Conference on E-Business and Telecommunication Networks (ICETE), Setubal, Portugal, August 2004.

Member of the Program Committee and Reviewer for the IADIS International Conference “e-Society 2004,” Avila, Spain, July 16-19, 2004.

Reviewer for the 2004 Conference on Advances in Internet Technologies and Applications (CAITA 2004) Purdue University, West Lafayette, IN, July 8-11, 2004.

Reviewer for the 2004 International Business Information Management (IBIM) Conference, Amman, Jordan, July 4-6, 2004.

Session Chair at the 13th Annual Industrial Engineering Research Conference (IERC 2004), Houston, TX, May 15-19, 2004. Session entitled “Advancements in Engineering Economy.”

Reviewer for the 2004 Eastern Academy of Management (EAM), Providence, RI, May 12-15, 2004.

Reviewer for the 6th International Conference on Enterprise Information Systems (ICEIS), Porto, Portugal, April 2004.

Reviewer for the 2004 Hawaii International Conference on System Sciences (HICSS 2004), Big Island, HI, January 5-8, 2004.

Session Chair at the pre-International Conference on Information Systems (ICIS 2003) workshop entitled “The Second Workshop on e-Business” (WeB 2003) in Seattle, WA (December 2003).

Reviewer for the 2003 International Business Information Management (IBIM) Conference, Cairo, Egypt, December 16-18, 2003.

Reviewer for the 2003 Annual Decision Sciences Institute (DSI) Meeting, Washington, DC, November 22-25, 2003.

Reviewer for the 2003 Americas Conference on Information Systems (AMCIS 2003), Tampa, FL, August 3-5, 2003.

Reviewer for the 2003 Academy of Management Conference, Seattle, WA, August 1-6, 2003.

Reviewer for 12th Annual Industrial Engineering Research Conference (IERC 2003), Portland, OR, May 18-20, 2003.

Reviewer for the 5th International Conference on Enterprise Information Systems (ICEIS), University of Angers, France, April 2003.

Reviewer for the 2002 Academy of Management Conference, Denver, CO, August 9-14, 2002.

Reviewer for the 2001 Americas Conference on Information Systems (AMCIS 2001), Boston, MA, August 3-5, 2001.

Reviewer for 10th Annual Industrial Engineering Research Conference (IERC 2001), Dallas, TX, May 20-20, 2001.

Reviewer for 9th Annual Industrial Engineering Research Conference (IERC 2000), Cleveland, OH, May 21-23, 2000.

Reviewer and Discussant for the Society for Advancement of Management (SAM) 2000 International Management Conference, St. Augustine, Florida, March 30 - April 1, 2000.

Discussant for the Society for Advancement of Management (SAM) 1999 International Management Conference, Las Vegas, NV, March 28-30, 1999.

Courses Taught and Developed

State University of New York (School of Business), New Paltz, New York

Graduate (MBA) Courses:

BUS 500	Excel Tutorial	Taught
BUS 520	Managing Operations and Information Technology	Taught
20571	Management Information Systems	Taught/Developed

Undergraduate Courses:

BUS 095	Excel Tutorial	Taught
BUS 215	Business Decision Support Systems	Taught
BUS 312	Operations Management	Taught
BUS 309	Statistics for Business and Economics I	Taught

Kozminski University (Akademia Leona Koźmińskiego), Warsaw, Poland

Business Analysis	Taught
Computerized Management Information Systems	Taught
Business Analytics using Spreadsheet	Taught
Business Data Mining	Taught
Writing Academic Article	

Stevens Institute of Technology, Hoboken, New Jersey

FIN 515 Financial Decision Making	Taught
FIN 615 Financial Decision Making	Taught

Cracow University of Economics (Uniwersytet Ekonomiczny w Krakowie) Krakow, Poland

Analysis and Design of Information Systems	Taught
--	--------

College of Management "Edukacja" in Wroclaw, Poland

Software Engineering	Taught
Marketing Research	Taught
Business Process Management	Taught

ESAN, Lima, Peru

La Semana Internacional de ESAN

Business Process Management in Emerging Economies	Taught
---	--------

Professional and Academic Affiliations

Association for Information Systems (AIS)

Professional Work in Progress (Selected)

“A Model for Assessing Information Technology Investments: Insights from Event Studies.”
Narczyz Roztocki and Heinz Roland Weistroffer. Working paper in preparation for the
Journal of the Association for Information Systems (JAIS).

Narczyz Roztocki, Ph.D.
Professor

July 30, 2024

Significant experience in Asset Management, derivatives, Quantitative Finance and statistical modeling. Developed stochastic trading strategies. Excellent inter-personal and communication skills. Managed people and assets as a risk manager and a risk taker.

EXPERIENCE

- BNP Paribas** New York, NY
Director, Head of Quant Modeling for Risk Americas 2016 – 2020
- Established & headed the quant risk modeling team for the Americas. Helped licensing BNPP in LatAm.
 - Built and oversaw proprietary hedging and risk management strategies to keep market neutrality (VaR < \$15M)
 - Managed equity/bond portf. risk (>\$1B); gamma, vega hedging. Designed/applied GARCH volatility models.
 - Redesigned MBS hedging strategies/models for >\$2B MBS (TBA, CMO...) and vol surfaces for bonds, rates.
 - Enhanced multi-factor econometric models and vol surfaces; improvement in hedge ratios and 3-5% on P&L
 - Advised Board Risk Committee on strategies and risk/returns. Reduced regulatory capital charges (-30% MR VaR)
 - Secured key regulatory approvals from the Fed, ECB. Led research, held seminars on Quantitative Finance.
- Wells Fargo** New York, NY
Director, Market & Counterparty Credit Risk (CCR) 2015 – 2016
- Upgraded credit pricing, default and recovery methodologies; relative value forecasts for Equity/credit. C++.
 - Enhanced PFE for IR/FX/Credit/Eq/Cmd. Designed stochastic fat-tail models for equity trading (mixtures, PCA).
- Federal Reserve Bank of New York** New York, NY
Sr. Financial Analyst - Markets Group (Fed's trading floor) 2010 - 2015
- Co-managed the EUR Fed Foreign Portfolio (>\$20B). Optimized portfolio, dynamic efficient frontier.
 - Managed collateral valuation and modeling for Discount Window: >\$400 B in loans, IR and structured products.
 - Contributed to Quantitative Easing (QE2, QE3): long/short TSY; relative value MBS (\$50B+ monthly purchases).
 - Designed the Fed margining system for MBS (>\$1.5 Trillion). Statistical arbitrage for TSY curve (yield dislocation).
 - Created stochastic IR models (PCA, time series and cross-sectional analyses). Taught advanced finance seminars.
- Graham Capital Management** Norwalk, CT
Macro Strategies 2009 – 2010
- Improved methodologies and multi-factor models for equity market-neutral strategies. Enhanced time series analyses and statistical arb strategies (co-integration, error-correction, PCA). Reduced risk, hedge mismatches, drawdowns.
 - Enhanced quantitative algorithms and risk models across assets (e.g., ED/FF Futures, TBAs, Tsy and Bond Futures, Caps, Floors, FRAs, Swaps, Swaptions, Domestic and Foreign Corps, Commodities, Equity, Credit, FX). In C++.
- J.P. Morgan, Asset Management** New York, NY
Strategist, Quantitative Research, Fixed Income Trading 2007 – 2009
- Improved multi-asset quant investment strategies; research across global markets and instruments.
 - Helped managing asset allocation (mean-variance opt.) & factor exposures of 1B+ JPM portfolios. (C++, R, Perl)
 - Hedged duration, curve risk, gamma and vega of Agy non-Agy MBS portfolios with IR swaps and swaptions.
- Brookhaven National Laboratory** Upton, NY
Principal Investigator, Energy Sciences and Technologies Dept. (U.S. Dept. of Energy) 2003 – 2007
- Designed advanced nuclear reactors for the US Govt. Developed Monte Carlo models (C/C++, MATLAB).

EDUCATION

- Massachusetts Institute of Technology (MIT), Department of Nuclear Engineering** Cambridge, MA
- Ph.D. in Nuclear Engineering, Minor in *Quantitative Finance*. Teaching Assistant.
 - M.S. in Nuclear Engineering. Teaching Assistant. Manson Benedict fellowship.
- Polytechnic of Milan, Department of Energy Engineering** Milan, Italy
- M.S., Graduated *summa cum laude*

AGATHE SADEGHI

65 Webster Avenue, Jersey City, New Jersey, 07307

646-994-0494 ◊ asadeghi@stevens.edu ◊ linkedin.com/in/agathe-sadeghi

EDUCATION

Stevens Institute of Technology, Hoboken, NJ

Expected May 2024

Doctor of Philosophy in Financial Engineering

GPA: 3.92/4.00

- Awarded a full tuition waiver and a full scholarship
- Passed all three parts of Comprehensive exam, theoretical, practical and subject, in first try with high scores
- Relevant Coursework: Probability, Statistics, Dynamic Programming, Time Series Analysis, Machine Learning in Finance, Fin-tech

Stevens Institute of Technology, Hoboken, NJ

Dec 2020

Master of Science in Financial Engineering

GPA: 3.92/4.00

- Awarded the competitive Provost's Master Fellowship of \$15,000, and the Jérôme Lohez 9/11 Scholarship
- Relevant Coursework: Pricing and Hedging, Advanced Derivatives, Stochastic Calculus, Computational Finance, Risk Management, Portfolio Theory, Financial Data Science, Investment Management

Iran University of Science and Technology, Tehran, Iran

Sep 2018

Bachelor of Science in Industrial Engineering

GPA: 3.80/4.00

- Graduated in top 2% of 160 students in Industrial Engineering
- Relevant Coursework: Statistics, Numerical Analysis, Econometrics, Microeconomics, Macroeconomics

SKILLS

- R, Python, SQL, Bloomberg, Eviews, Microsoft Excel, Microsoft Word, Microsoft Powerpoint, LaTeX
- Problem-solving, Leadership, Team Work, Communication, Time Management

ACADEMIC RESEARCH

PhD Research

Jan 2021 - Present

- Constructed a temporal network with credit default swap data from Markit for 2010-2020
- Analyzed joint and conditional eigenvector trajectories for different layer coupling strengths
- Identified the top tickers according to time-average centrality and first-order mover scores

Predicting Corporate Bond Yield Term Structure

June 2020 - Dec 2020

- Presenting in Northeast Business and Economics Association Conference held in Tropicana Resort and Casino, Atlantic City, New Jersey on November 4-6, 2021
- Scheduled for the paper to be published in the conference proceedings in Journal of Business and Economic Studies
- Developed univariate and multivariate linear regression and Random Forest (RF and MRF) models to investigate the effect of forward rates and forward spreads on the corporate bond yield
- Forecast using a rolling window with different lags and maturities and compared the performance of models by MAE measure
- Concluded a better performance with ARIMAX model when using forward rates and RF model when using forward spreads in yield prediction

EXPERIENCE

Stevens Institute of Technology, Hoboken, NJ

Feb 2021 - Present

Instructor

- Teaching Bloomberg and Thomson Reuters course to graduate and senior students
- Instructing Bloomberg API as R, Python and Excel and how to query data from Bloomberg, Capital IQ and WRDS

Teaching assistant

Sep 2020 - May 2021

- Assisting professors and graduate students for Portfolio Theory and Applications, Statistical Learning and Market Microstructure courses

Hanlon Financial Systems Laboratory, Hoboken, NJ

Oct 2019 - Sep 2020

Research and Data Science lab assistant

- Integrated and built a new database using Python, SQL and Thomson Reuters News Analytics data
- Chose and posted top projects of Financial Engineering students on the lab's website

"Pars-Khodro" Auto Manufacturing Company, Tehran, Iran

Nov 2018 - April 2019

Stock Affairs and Cost Analysis Intern

- Developed 20 page report on company's stock price volatility due to import sanctions, domestic manufacturing and customer dissatisfaction and presented to the Strategic Planning Committee for future decisions
- Analyzed the cost model in detail in collaboration with four divisions under the supervision of the CFO to integrate the cost reporting based on division breakdown

PATRICIA L. SAPORITO

OBJECTIVE

Help organizations innovate and improve business performance through applied data and analytics.

SUMMARY OF QUALIFICATIONS

Energetic, passionate and accomplished consultant with over 20 years of business and information technology experience. Includes industry analysis, business development, product management, business systems analysis, systems architecture and design, and business operations. Strong experience across all industries; deep industry experience in insurance, reinsurance and risk management.

- Business Development
- Strategic Planning
- Product Development/Management
- Industry & Market Research & Planning
- Business Requirements & Operational Analysis
- Systems Requirements/Analysis/Design
- Technology & Vendor Analysis/Recommendation
- System Design, Development & Deployment
- Data and Analytics Strategy & Operationalization
- Design Thinking /Innovation Facilitation

EXPERIENCE AND ACCOMPLISHMENTS

Saporito & Associates, LLC Founder & Principal Consultant

April 2019 - Present

Founded data and analytics consulting services firm. Provide consulting and training focused on applied data and analytics. Strong focus on insurance, financial services and healthcare industries. Has developed data and analytic programs for professional organizations as well as corporations.

SAP BusinessObjects, Newtown Square, PA

June 2006-April 2019

Sr. Director, Global Center of Excellence for BI (July 2011 – April 2019)

Supported customers and sales in best practices use of SAP BusinessObjects solutions across multiple industries. Global program director and lead consultant for Data Analytics Strategy Program.

Sr. Director, Insurance Analytics, Business Analytics Solutions Group (June 2009 – June 2011)

Managed industry analytic solution portfolio for insurance, healthcare and life sciences industries. Provided leadership in marketing, business development and implementation services.

Sr. Service Line Leader, Performance Analytics – Business Objects/SAP (April 2008 –June 2009)

Provided senior business consulting services for business performance and business intelligence. Provided insurance analytic leadership and subject matter expertise before and after acquisition by SAP.

Insurance Industry Director, Enterprise Performance Management - BusinessObjects (June 2006-April 2008)

Managed overall industry EPM strategy, solutions and business development.

Information Builders, Inc., New York, NY

June 2005-June 2006

Insurance Industry Vertical Manager

Managed insurance industry strategy including business development, solutions and partnerships. Co-managed industry pipeline. Successfully implemented new insurance solution and extended reinsurance version of solution.

Teradata Div., NCR Corp., Dayton, OH

Oct 1999-May 2005

Industry Director, Insurance, Healthcare & Pharma – National Accounts Division (2002-2005); Sr. Industry Consultant (1999-2001)

Directed business development, sales support, solution development, implementation and post implementation business value assessments in enterprise data warehousing and business intelligence for Customer, Distribution, Risk, Operational, Financial and Data Management areas through team of industry consultants and partners.

- As a member of National Accounts Leadership Team, helped architect and implement industry mission, strategy and objectives for analytic data warehousing in insurance and healthcare. Provided professional development for industry consultants. Teradata Industry of the Year for 2 successive years.
- Expanded insurance market awareness of Teradata through board memberships, industry partnerships, industry conferences, press and analyst relations.

META Group (acquired by Gartner Group), Stamford, CT

Oct 1998 – Sept 1999

VP & Director, Insurance Information Services (Research Service)

- Led business development of emerging insurance industry technology research service. Sold and delivered technology research and consulting services to insurers, brokers and vendors for property and casualty and life insurance industry. Grew revenue from \$5 million to \$8 million in revenue.
- Positioned META Group practice industry leadership through conferences, press, industry surveys and research. Directed industry research agenda and content production. Directed agenda for META Group's insurance research conference, teleconferences and webinars. Authored multiple research reports.

Insurance Services Office (ISO), Jersey City, NJ

Sept 1997–Sept 1998

Risk Decisions Services Div., Group Product Manager/Business Systems Owner

Managed Property Inspection and Comparative Rating information solutions. Evaluated non-insurance industry market for products and cost-effective alternatives to create/obtain content. Prioritized and managed division business systems development with IT. Managed team of 2 product managers and 2 business systems architects.

Saporito & Associates, New York, NY

Jan 1992 –Aug 1997

Owner & Principal Consultant

Procured, managed and delivered industry, market, competitive and product research to insurers, brokers and vendors. Employed consultants as needed on a subcontracting basis.

American Re-Insurance Co., New York, NY & Princeton, NJ

Oct 1982 –Dec 1991

AVP, Research & Development (1989-1991); CIO, AM-RE Brokers (1988-1989); Director/Business Systems Architect (1982-1987)

American International Group, New York, NY

Mar 1980 – Sept 1982

Operations & Business Systems Manager

Directed operations research with team of 4 analysts.

Hartford Insurance, Merchants Mutual Insurance Co

Prior to 1980

Increasingly responsible field and home office claims roles. One of first female claim managers in U.S. at Hartford Insurance. Directed Claim Field Operations and Systems nationally at Merchants Mutual Ins. Co.

INDUSTRY LEADERSHIP & EDUCATION

IASA (Ins. Acctg & Systems Assn.), Technology and Accounting Risk & Finance Committees (1998 – 2011)

IDMA (Insurance Data Management Association), Board Member, (2008-2011, 2019)

SIR (Society of Insurance Research), Past President (1996)

APIW (Association of Professional Insurance Women), Past President (1995-1996)

Chartered Property & Casualty Underwriter (professional designation), Society of CPCU (1992)

Bachelor in Bus. Adm., Lubin School of Business, Pace University, New York, NY (1988)

Certified Systems Analyst, New York University (1984)

BOARDS/OTHER ROLES

Stevens Institute of Technology Masters Program in BI & Analytics, Advisory Board Member (2016-present);

Adjunct Professor, School of Business (2020-2024)

Risk & Insurance Management Society, Contract Curricula Developer and Instructor (2020 – present)

Moody's Analytics, Contract Curricula Developer and Instructor (2019 – present)

Verisk, Contract Curricula Developer and Instructor (2024)

THOUGHT LEADERSHIP

Author, "Applied Insurance Analytics", FT Press, 2014. (In 2nd printing)

Best Review "Technology Insights" columns (2x/yr.), 2001- 2020

PERSONAL INTERESTS

Travel, Theater (Drama), Music (Jazz and Chamber Music)

VOLUNTEER ACTIVITIES

SCORE Northeast Chapter, Co-Chair (2022-2023), Mentor (2019- present)

CONTACT INFORMATION

Email: psaporito@patsaporito.com / pat.saporito@gmail.com

Linked In: www.linkedin/in/patriciasaporito

Website: www.patsaporito.com

Cell: (201) 681-9671

Leigh Ann Soltysiak

15 Holmes Oval, New Providence, NJ 07974

<https://www.linkedin.com/in/lsoltysiak> Mobile 908 553 0554 Las@silverleafconsulting.net

SKILLS

Multi-faceted, award-winning, high energy, business leader and strategist with extensive experience launching global products, framing product value & successfully executing/selling/growing brands: **Front End Innovation/Pipeline; Portfolio/Platform Development, Global Strategic Marketing; Brand Management & Strategic Account Planning/Specialty Sales Coaching, Training & Management**

Integrity/Ethics	Human Centered Design Thinking/Lean Start Up
Strategy	Innovation Practitioner/What If®
Teamwork/Motivating others	New Product Planning/Development
Coaching/Guidance	Growth Platform Development (Front End/Pipeline)
Mentorship	Regional/Brand Marketing & Execution
Communication (Presentation/Writing)	Strategic Sales Execution/Account Management
Relationship Building	Sales Leadership/Management/Coaching
Emotional Intelligence	Government Relations/Market Access
Active Listening	Patient Advocacy/Development/Strategy
Problem Solving/Resourceful	Commercial Analytics/Critical Thinking

Hikma Pharmaceuticals, USA, Berkley Heights, NJ

11/13-Present

Director, Strategy

- Responsible for the commercialization/brand strategy for COMBOGESIC® IV, inclusive of all channel integration and strategic sales (force) support. Developed brand framework, positioning, lead all integrated communications across vendors. Partner with all cross-functional stakeholders (legal, compliance, regulatory, etc.) daily to optimize brand growth.

Silverleaf Consulting, LLC®, New Providence, NJ (New York Metropolitan Area)

1/15-Present

Global Commercialization Strategist

- Lead *life science, biotech, med-tech, consumer-tech* organizations on how to *prepare for, solve and execute today's toughest growth challenges for pipeline/new product portfolio and brands*. Key activities: *mine insights; create value proposition; establish enterprise/portfolio strategy, develop market access/advocacy efforts, integrate (brand) marketing, recommend strategic sales strategy/management; design lifecycle plan, etc.*
- Results: Achieve 'best practice' pre-launch initiatives, such as 'validated', insight-driven portfolio value proposition; gain market access to key customer targets; conduct deep analysis and secure advocacy/ambassador strategy.*

Johnson & Johnson (J&J) Family of Companies

3/1996-12/2014

Director (Global) Strategy/Pipeline, ETHICON/Surgical Care, Somerville, NJ

- Led/managed 5-member new product development strategy team (+\$3B global sales franchise). Consistently contributed to pipeline development, including largest transformational asset and multiple incremental products.
- Results: Global Board "above and beyond" endorsement of 3 recommended growth platforms (R&D investment).*

Worldwide Marketing Director, ETHICON/Surgical Care, Somerville, NJ

- Global Launch Leader oversaw direct-report, cross-functional team. Directed all pre-launch activities for new product surgical care portfolio, inclusive of multiple 'in-house' and acquired products including *insight mining, market research; TPP, value proposition, portfolio/brand naming; positioning, core messaging; market development.*
- Results: J&J Vice President Award Winner "Strategic Innovation & Pipeline," Launch Excellence.*

Worldwide Marketing Director, ETHICON Women's Health & Urology, Somerville, NJ

- Global Launch Leader (brand and pipeline lead), including business-unit lead for women's health strategic plan. Chosen by Executive Committee to lead BU's largest product acquisition. Responsible for all commercial excellence/best practices: market research, TPP, value proposition, brand, etc. Led/managed global commercial (cross-functional team) activities.
- *Results: Commercial plan approval. Sponsored for Women's Executive Leadership Program, Rutgers.*

Global Commercial Leader, Strategic Marketing, Pharmaceutical Group, (PGSM), Raritan, NJ

- Led commercial strategy, go/no go platforms activities and recommendations. Expanded portfolio of \$3B drug compound.
- *Results: Multiple GMB approvals; Standard of Leadership Award (Stroke Team).*

Nephrology/CKD Product Management, In-Line Marketing, Ortho Biotech, Bridgewater, NJ

- Implemented market plan for PROCRI[®]. Integrated Business Plan & Strategic Plan lead. Promoted to Product Director.
- *Results: Gained 20% budget increase. Ninety-one percent market share (vs. 60% PY call) 20% YOY.*

Hem/Oncology/Infectious Disease District Sales Manager, Ortho Biotech, San Fran, CA

- Led 14-member oncology sales team, including recruiting, training, skill development & coaching.
- *Results: Instituted innovative MCO programs; Moved District from #35 to #1; Promoted 4 members.*

Institutional Hospital & Community Sales Specialist, Ortho Biotech, Philadelphia, PA & Hoboken, NJ

- Drove biotech product sales quota across University of Penn hospital system & community.
- *Results: Awarded top ranking, Presidents Cup #1.*

SEASONAL

Adjunct Professor / Industry Instructor, Stevens Institute of Technology, Hoboken, NJ

2019-Present

Instruct engineering students on "Introduction to Entrepreneur Thinking" within School of Engineering/Science; and MBA students on "Human Centered Design Thinking" within the School of Business

VOLUNTEER

National Institute of Health (NIH) /Department of Health & Human Services (HHS)

2019-2021

Selected by Secretary of Health, CDC, NIH, FDA to serve as Co-Chair for Disease Working Group (TBDWG); helped write published reports/briefs/recommendation to Congress with public/private stakeholders (CDC, NIH, FDA, CMS, DOD, etc.). Co-Chair: Alpha Gal Syndrome & Public Input Sub-Committees. Served on Diagnostic Advisory Group.

<https://www.hhs.gov/ash/advisory-committees/tickbornedisease/reports/alpha-gal-subcomm-2020/index.html/>

<https://www.hhs.gov/ash/advisory-committees/tickbornedisease/reports/topic-development-briefs/index.html#brief-diagnostic>

https://www.hhs.gov/sites/default/files/tbdwg-2020-report_to-congress-final.pdf

Stevens Venture Center Entrepreneur (EIR) Mentor, Stevens Institute of Technology

2018-2021

Entrepreneur in Residence (EIR) Mentor within the Stevens Venture Center (SVC) Program; collaborate among innovators, investors, technology professionals and business experts -providing advice and serve SVC community

Enright Melanoma Foundation, Board of Trustees

2017-2019

Elected Board Member, strategic advisor supporting global mission to raise sun safety, awareness and help prevent melanoma through early detection and education

National Institute of Health (NIH) / Department of Health & Human Services (HHS)

2018-2019

Selected out of 217 nominations to serve on the Vaccine & Therapeutics Sub-Committee to share expertise and experience to improve the Federal response to vector-borne diseases, including improving treatment

Healthcare Businesswomen's Association (HBA)

2002-2017

Global Director/C-Suite Strategy (Appointed) ('17); HBA Metro Chapter Incoming Past President ('16). President ('06); President-Elect ('05); Vice President ('04); Director ('07); Director ('11); Chair ('02'03)

Education

Northwestern University, Medill School

Evanston, IL

Master of Science (M.S.) Integrated Marketing /Communications

Syracuse University, Newhouse School

Syracuse, NY

Bachelor of Science (B.S.), Advertising

ROBERT STEIN**Contact****Information:**

(personal)

875 West End Avenue

Apartment 6 C

New York, New York 10025

Cell phone: 973 943 0812

Email address: Robert.stein@blankrome.com

(business)

Blank Rome LLP

1271 Avenue of the Americas

New York, New York 10020

Work phone: 212 885 5206

Employment

Blank Rome LLP, Senior Partner

2003 – present

History:

Wolf Block Schorr and Solis-Cohen, Partner

1994 – 2003

Luskin, Stern and Eisler, Counsel

1992 – 1994

Bankers Trust Company, Vice President

1988 – 1992

Manufacturers Hanover Trust

Company, Vice President

1979 – 1988

Education:

Albany Law School of Union University,

Juris Doctor

1978

Cornell University,

Bachelor of Science

1975

Bar Admission:

New York State, Third Department

1979

Interests:

hiking, biking, travel, fiction and non-fiction

Shobhit Thapar

Mobile: 213-361-1355; Email: Shobhitthapar@yahoo.com

Executive Director and Head of Market Risk for US Broker Dealer

*Risk Management, Asset Liability Management, Strategic & Capital Planning,
Governance, Business Transformation, Agile Development*

A prudent, dependable and decisive risk professional with a wealth of experience in galvanising profitable growth and risk mitigation within global capital markets, leveraging in-depth knowledge and leadership skills to influence strategic planning at Board level.

Proven track record in positively impacting \$multi-billion trading, lending and banking operations through process improvement and best practices; an innovative thought leader who demonstrates a natural aptitude for managing global client-focused teams that enable collaboration and deliver high quality results.

Skills

Operations Management	Significantly improving \$multi-billion trading, lending and banking operations
Relationship Management	Collaborating effectively across regulators and global organisations at C-level
People Management	Leading project/programme teams across multiple functions to achieve goals
Business Transformation	Driving commercial success in a resource constrained and risk-focused setting
Risk Management	Increasing profitability and capital efficiency through decisive risk frameworks
Process Improvement	Achieving operational excellence through process improvements/automation
Regulatory Compliance	Understanding market regulations, legal obligations and client requirements

Career History

Jun 2007 – Present

Morgan Stanley, New York

Head of Market Risk for Morgan Stanley's US Broker Dealer (MSCO)

Jun 2020 – present

Reporting to MSCO's CRO and an executive member of the risk committee; creating and managing risk governance frameworks, ensuring regulatory compliance for the \$400+B US institutional Broker Dealer.

- Briefing the Board of Directors on a quarterly basis on market risk and associated implications
- Monitoring markets and consulting regularly with financial regulators on all market risk related items
- Developing a Cash and Derivatives strategy for Equities, Fixed Income and Commodities to galvanise business line objectives

Achievements

- ✓ Reduced peak regulatory risk capital requirements by >25% without impacting profitability by working with business lines, Treasury and Finance to better manage risk across legal entities
- ✓ Implemented a new risk appetite framework relating stress test limits, value-at-risk (VaR) and risk sensitivity limits to the regulatory capital adequacy

Executive Director - Global Head of Risk for Traded Credit and Securitized Products Jan 2018 – present

Driving strategic initiatives to risk manage a complex \$multi-billion trading and lending portfolio of Corporate and SPG assets through various market cycles including the COVID-19 crisis.

- Leading a global team and partnering with senior business management to increase capital efficiency
- Providing regular reports and briefings to regulators, CRO, senior management and Board of Directors
- Leading complex deal review and approval process to mitigate risks on \$multi-billion transactions

- Improving the global stress testing process for Credit/SPG assets for regulatory (CCAR, DFAST and UK Macro) and internal stress scenarios

Achievements

- ✓ Introduced a new scenario design framework, automated production process and enhanced results reporting for senior management and board level
- ✓ Reduced downside risk and increased risk efficiency and profit by designing a new risk appetite framework and new product approval process
- ✓ Significantly reduce the RWA for credit trading and regulatory risk capital by 15% by championing the development of a new corporate credit VaR model and leading the FRTB initiative for Credit assets

Vice President - Americas Head Risk of Traded Credit

Jan 2014 – Dec 2017

Delivered various methodologies, analysis and business intelligence to drive improvements in wallet share growth, process efficiencies and lead-times, risk management, profitability and cost reduction.

- Led a team of 4 to deliver market insights to support risk management decision making and strategy
- Introduced a repository of potential portfolio risks and implemented mitigating actions where necessary
- Designed and delivered BHC and FRB CCAR scenario for credit assets and presented findings to the governance steering committee, CRO and CFO to secure regulatory approval and C-level buy-in
- Balanced risk versus liquidity for large trade approvals in Competitive Muni and HY Corporate space

Achievements

- ✓ Enriched credit assets stress testing production framework via process automation to reduce weekly results lead-times by 2 days and saving 1 headcount
- ✓ Enhanced VaR and Stressed VaR methodologies and successfully worked with regulators on approvals
- ✓ Championed growth of new trading products and businesses to increase US market share
- ✓ Led credit trading risk efficiency analysis leading to the development of a more risk efficient strategy

Associate - Asset Liability Risk Manager

Jun 2010 – Dec 2013

Partnered with business lines to develop and deliver asset-based lending products, and manage asset risk across the bank's deposits, loan assets (mortgage and retail lending) and AFS portfolio.

- Worked closely with Treasury to create bank deposit pricing and interest rate hedging strategies
- Partnered with Wealth Management to offer Jumbo & Conforming Mortgages, and other new products
- Part of the team that improved profitability by >\$120M per annum and reduced Interest Rate Risk of the Banking Book; successfully transforming asset liability management for \$100+B bank balance sheets

Early Career

Associate - Risk Manager

Morgan Stanley Wealth Management

Jun 2008 – May 2010

Analyst, Retail Trading (Summer Internship)

Morgan Stanley

Jun 2007 – Aug 2007

Education & Professional Development

Master of Science (MS) in Computer Sciences

New York University, New York

Bachelor of Engineering (BE) in Computer Engineering

University of Mumbai, India

Other Positions of Responsibility

Director of the Global Association of Risk Professionals (GARP) New York chapter since 2018 bringing together leading risk professionals, increasing dialogue and allowing for better informed risk decisions

KAL VADASZ

6 Trimmingham Ct., Mendham, NJ 07945 • (917) 509-4342 • kalvadasz@gmail.com

SUMMARY

A seasoned, versatile professional deeply experienced in the application and communication of corporate finance principles. Finance-educated at the undergraduate and graduate level with a career spent serving and advising investors and senior leadership, both client and internal. Immersive experience in management consulting and corporate finance; capital markets; operations and business development. Intense focus on economic soundness, tactical substance, and high-quality, team-based execution. Think quickly and strategically, ask the right questions and work with others to solve problems, implement programs and drive results. Effective balancing short- and long-term tradeoffs. Strong communicator in written and spoken form, with top university teaching experience.

EXPERIENCE

ARKANGEL PARTNERS LLC, Mendham, NJ 10/2022 – Present

Managing Partner

- Provide fractional CFO and CAO support to clients in the commercial real estate area with a focus on industrial and office. Manage major elements of finance, reporting, administration and transactions.

FORTUNA ADVISORS LLC, Mendham, NJ 1/2022 – 1/2023

Vice President

- Managed consulting projects focused on helping Fortune 500 clients realize top quartile TSR through focus on economic profit framework for performance measurement and decision making, incentive compensation and training and communication. Used corporate finance and agency theory principles to drive shareholder aligned behaviors, improving corporate culture and employee satisfaction. Multiple publications.

STEVENS INSTITUTE OF TECHNOLOGY, SCHOOL OF BUSINESS, Hoboken, NJ

Adjunct Faculty Member – Finance & Management 5/2018 – Present

- Deliver MBA introductory graduate finance course and Corporate Finance. Teach on-campus, corporate onsite & online sections. Two-time recipient of Provost's Letter for Outstanding Teaching.
- Deliver Fundamentals of Consulting course to School of Business undergraduates.

Director, Business Development, Corporate Programs and Outreach 3/2014 – 1/2022

- Sourced and managed corporate educational program for working professionals pursuing graduate degrees, primarily: MBA, Data Analytics, Information Systems and Operational Excellence. Managed relationships with Fortune 100 companies. Drafted partnership agreements and promotional content.
- Doubled student count to over 400 and increased concurrent cohort sections from one to fourteen.
- Created the Corporate Programs group to manage the professional student experience from recruitment, application, and enrollment through graduation.
- Pioneered the offering of synchronous online delivery format in 2018, extending program reach.
- Drove the development of new certificate programs in Management; Operational Excellence and Fundamentals of Finance; and a new MBA concentration in Corporate Innovation & Leadership.
- Interim Director of the MBA/Management Programs. Led program for 2014/15 academic year.

RBC CAPITAL MARKETS, New York, NY 2010-2/2014

Vice President, US Rates Sales

- Marketed US dollar government and agency securities, interest rate swaps, and rate volatility products to bank portfolios, real money portfolios and hedge funds. Provided macroeconomic and market color; trade structuring and pricing; trade execution; and liaising with traders. Specialized in delivering high

quality research and strategy content to all levels of the client. Opened & grew active counterparty relationships with money center banks and top macro hedge funds. Held Series 3, 7, 55 & 63 licenses.

CITIGROUP GLOBAL MARKETS, New York, NY 2004-2009
Vice President, US Interest Rate Sales

- Covered large bank portfolios, US Agencies and real money accounts for government, agency and interest rate derivative products. Provided market color, economic and strategy research, and cash and interest rate derivative products exchanged via flow and structured trades.
- Completed renowned Salomon Smith Barney Associate Program; four-month educational course across all Markets products and successfully completed rigorous exam cycle. Promoted to Vice President in December 2007. Other positions held: Associate (July 2004); Summer Associate (2003).

STERN STEWART & CO., New York, NY & Amsterdam, NL 1996-2003
Director, Retail Practice & Vice President – EVA Implementations

- Directed consulting engagements implementing the Economic Value Added (EVA) management framework. Engagements establish rigorous definition of period economic profit and long-term economic performance, link definition to operating performance drivers and decision processes, train employees on methods to drive improvement and design shareholder-oriented compensation systems.
 - Worked with Executive Committee leadership on compensation structure, goal setting, financial policy and org design. Led cross-functional client teams developing and executing training programs.
 - Based in Europe for two years, leading global team of 17 consultants servicing \$65B retailer. Directed teams in the US, Europe and South America. Co-sold firm's largest contract.
 - Led Retail industry practice, managing extended engagements with leading consumer electronics retailer and UK-based global consumer brands company. Authored \$16MM+ in successful proposals.
 - Speaker at National Retail Federation national conference. Worked part-time during business school.
- Associate*
- Designed EVA measurement, valuation models, capital budgeting and decision tools, training programs, and incentive compensation plans. Developed models translating share price into multi-year performance and incentive targets. Designed and produced a published analysis of 100 largest US retailers. Promoted to VP Dec. 1999. Other positions held: Senior Analyst/Analyst (1996-1998).

SALOMON BROTHERS INC., New York, NY 1995-1996
Analyst – Treasury Analytics

- Hired into Financial Division Analyst Training Program. Provided analytical support focused on liquidity forecasting to Corporate Treasury and the Finance (Funding) Desk.

EDUCATION

COLUMBIA UNIVERSITY, GRADUATE SCHOOL OF BUSINESS, New York, NY 2002-2004
Master of Business Administration, Concentration in Finance. May 2004. GMAT: 730 (97th percentile)

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA, Philadelphia, PA 1992 –1995
BS, Economics. May 1995. Concentrations: Finance, Entrepreneurial Management. Completed required coursework in three years. Penn Students Federal Credit Union (Board Member / VP Credit).

ADDITIONAL INFORMATION

- Delbarton School alumnus. Interests include wrestling, ancient history, and US & European football.
- Recent publications:
 - [FP&A: Making the Best of the Dog Days of Summer | CFO](#)
 - [Strategic Acquisitions: Their Mistake Could Be Your Next Opportunity | CFO](#)
 - [Beware of Zombie Businesses in Your Portfolio | CFO](#)

KAL VADASZ

6 Trimmingham Ct., Mendham, NJ 07945 • (917) 509-4342 • kalvadasz@gmail.com

SUMMARY

A seasoned, versatile professional deeply experienced in the application and communication of corporate finance principles. Finance-educated at the undergraduate and graduate level with a career spent serving and advising investors and senior leadership, both at clients and internally. Immersive experience in management consulting and corporate finance; capital markets; operations and business development. Intense focus on economic soundness, tactical substance, and high-quality, team-based execution. Think quickly and strategically, ask the right questions and work with others to solve problems, implement programs and drive results. Effective balancing short- and long-term objectives. Strong communicator in written and spoken form, with top university teaching experience.

EXPERIENCE**FORTUNA ADVISORS LLC, Mendham, NJ**

1/2022 – Present

Vice President

- Manage consulting projects focused on helping clients realize top quartile TSR through effective focus on economic profit frameworks for performance measurement and decision making, incentive compensation and training and communication.
- Deployment of sound corporate finance, agency theory and behavioral principles leads to more shareholder aligned behavior and improvement in corporate culture and employee satisfaction.

STEVENS INSTITUTE OF TECHNOLOGY, SCHOOL OF BUSINESS, Hoboken, NJ***Adjunct Faculty Member – Finance & Management***

5/2018 – Present

- Deliver MBA Program's introductory graduate finance course. Taught on- campus, corporate onsite & online sections. Recipient of Provost's Letter for Outstanding Teaching.
- Deliver Fundamentals of Consulting course to School of Business undergraduates.

Director, Business Development, Corporate Programs and Outreach

3/2014 – 1/2022

- Responsible for sourcing and managing corporate programs. Working professional students pursue principally MBAs, Data Analytics and Operational Excellence programs. Manage relationships with Fortune 100 companies in life sciences, financial services & communications services.
- Draft partnership agreements, program documents and promotional materials.
- Doubled student count to over 400 and increased concurrent cohort sections from one to fourteen.
- Created the Corporate Programs group to manage the professional student experience from recruitment, application, and enrollment through graduation.
- Pioneered the offering of synchronous online delivery format in 2018, extending program reach.
- Drove the development of new certificate programs in Management; Operational Excellence and Fundamentals of Finance; and a new MBA concentration in Corporate Innovation & Leadership.
- Interim Director of the MBA/Management Programs. Led all program from Aug 2014 to May 2015. Spearheaded curriculum revamps.

RBC CAPITAL MARKETS, New York, NY

2010-2/2014

Vice President, US Rates Sales

- Marketed US dollar government and agency securities, interest rate swaps, and rate volatility products to bank portfolios, real money portfolios and hedge funds. Provided macroeconomic and market color; trade structuring and pricing; trade execution; and liaising with traders. Specialized in delivering high quality research and strategy content to all levels of the client. Opened & grew active counterparty relationships with money center banks and top macro hedge funds. Held Series 3, 7, 55 & 63 licenses.

CITIGROUP GLOBAL MARKETS, New York, NY 2004-2009
Vice President, US Interest Rate Sales

- Covered large bank portfolios, US Agencies and real money accounts for government, agency and interest rate derivative products. Provided market color, economic and strategy research, and cash and interest rate derivative products exchanged via flow and structured trades.
- Completed renowned Salomon Smith Barney Sales & Trading Associate Training Program; attended comprehensive desk presentations over four months across all Markets products, rotated on 20+ desks and successfully completed rigorous exam cycle across analytical disciplines. Promoted to Vice President in December 2007. Other positions held: Associate (July 2004); Summer Associate (2003).

STERN STEWART & CO., New York, NY & Amsterdam, NL 1996-2003
Director, Retail Practice & Vice President – EVA Implementations

- Directed consulting engagements implementing the Economic Value Added (EVA) management framework. Engagements establish rigorous definition of period economic profit and long-term economic performance, link definition to operating performance drivers and decision processes, train employees on methods to drive improvement and design shareholder-oriented compensation systems.
- Interacted on a weekly basis with Executive Committee-level leadership concerning compensation structure, goal setting, capital expenditures, financial policy and organizational design. Led cross-functional teams to develop and deliver comprehensive training programs.
- Based in Europe for two years leading global team of 17 consultants servicing \$65B retailer. Directed teams in the US, Europe and South America. Co-sold firm's largest contract.
- Led Retail industry practice, managing extended engagements with leading consumer electronics retailer and UK-based global consumer brands company. Authored \$16MM+ in successful proposals.
- Speaker at National Retail Federation national conference. Worked part-time during business school.

Associate

- Designed EVA measurement, valuation models, capital budgeting and decision tools, training programs, and incentive compensation plans. Developed market models translating share price into multi-year performance and incentive targets for consolidated company & business lines. Designed and produced a published analysis of 100 largest US retailers. Promoted to VP Dec. 1999. Other positions held: Senior Analyst/Analyst (1996-1998).

SALOMON BROTHERS INC., New York, NY 1995-1996
Analyst – Treasury Analytics

- Hired into Financial Division Analyst Training Program. Provided analytical support concerning liquidity forecasting to Corporate Treasury and the Finance (Funding) Desk.

EDUCATION

COLUMBIA UNIVERSITY, GRADUATE SCHOOL OF BUSINESS, New York, NY 2002-2004
Master of Business Administration, Concentration in Finance. May 2004. GMAT: 730 (97th percentile)

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA, Philadelphia, PA 1992 –1995
BS, Economics. May 1995. Concentrations: Finance, Entrepreneurial Management. Completed required coursework in three years. Penn Students Federal Credit Union (Board Member / VP Credit).

ADDITIONAL INFORMATION

- Delbarton School alumnus. Interests include wrestling, ancient history, and US & European football.

David F. Vincenti

david@davidvincenti.com

973-369-3355

Summary

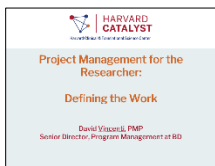
Educator, coach, facilitator, and Project Management Professional with a proven ability to implement new strategies and ideas. Proficient communicator and mentor. Capable in creating skill-building approaches, developing products and services, and designing systems, teams, and jobs.

Experience

2020 - present

Educator

- Adjunct Professor, Stevens Institute of Technology www.stevens.edu
- Adjunct Professor, professional development workshop facilitator, Feliciano School of Business - Montclair State University <https://www.montclair.edu/>
- Online seminar facilitator, self-paced learning content developer, Project Management - Harvard Catalyst <https://catalyst.harvard.edu/>

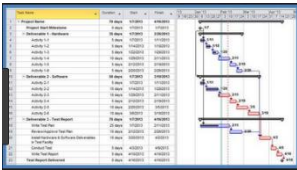


2001 - 2022

BD (<https://www.bd.com>)

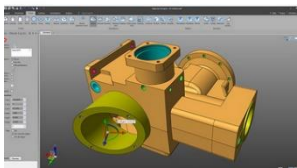
Senior Director, Program Management (2016-2022)

- Developed global and customized learning opportunities and development experiences for teams and individuals, focusing on project management.
- Designed and delivered virtual and live project management learning experiences with focus on project planning, and communication, risk management, New Product Development.



Senior Director, Product Innovation & Compliance (2014- 2016)

- Managed divestiture of vertebroplasty product line, developed data security strategy for product development in a global product data management system.



Core Team Member, Principal Team Leader (2007 - 2014)

- Led implementation of project management and integrated CAD subsystems in a global Enterprise Resource Planning system implementation, creating a practitioner network for post-launch support and ongoing skill-building.
- Managed portfolio of continuous improvement and revenue growth projects for drug delivery systems across eighteen manufacturing facilities.
- Led team of twenty professionals in support of financial and operational goals.



R&D Manager (various titles); Project Manager (2001- 2007)

- Managed multi-company team from prototype through launch of an episodic blood glucose management system.
- Managed team of fourteen associates supporting insulin delivery products, including professional development and organizational design.



2000-2001 Alfa Wassermann, Inc. (<https://www.alfawassermannus.com>)

Project Manager; Manager, Manufacturing Technical Support



- Managed development of first-in-kind Pilot System Ultracentrifuge. Managed Drafting department and Engineering Laboratory.
- Created and managed complaint investigation process and design changes for human and veterinary clinical analyzers

1988-2000 BD (<https://www.bd.com>)

Engineer, Senior Engineer, Business Manager



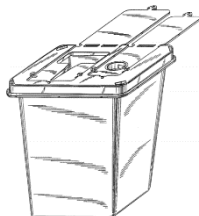
- Co-managed Phlebotomy Accessories business. Led technology development and product development projects in sample acquisition, sample containment, and phlebotomy accessories product lines.
- Developed test methods and mathematical models for mechanical and physiological parameters of diagnostic blood collection.

Education



- Master of Technology Management, Bachelor of Engineering, Materials Engineering, Stevens Institute of Technology (<https://www.stevens.edu>)
- PMP certification (<https://www.pmi.org/certifications/project-management-pmp>)

Patents, Publications, Presentations, and Other Positions



- Presenter, “Poker for Project Managers – A Decision-Making Laboratory.” PMI NJ Annual Symposium May 2024. Prior chapter and symposium presentations include “The Tools Less Taken,” and “Burn the Gantt!!!.”
- Corporate Leader/Teacher for courses including Planning and Leading Projects, Interviewing Skills, Manager Essentials, Inclusion and Diversity, Influence Without Authority, and other custom programs and workshops
- Academic Outreach lead, Corporate Advisor - PMI New Jersey Chapter
- Catechist, adult education team member, Saint Aloysius Church
- Co-designer, Design patent D447233 (US), “Needle Disposal System.”
- Lecturer, Stevens Institute Career Services (cooperative education)
- Co-author, “Luer Tip Roughness and Texture to Prevent Breakage In Critical Applications,” Andrew C. Farinella, David F. Vincenti, Mark Bowen – Materials and Processes for Medical Devices (ASM conference)
- Author, “A Measure of This World,” a full-length poetry collection with accompanying presentations on the life of Galileo Galilei.
- Workshop leader, elementary and middle school creative writing workshops

STEPHEN A. WHITE

Profile

Sometimes described as the father of BPMN, Steve has over 25 years of process modeling experience, ranging from modeling pilot workload to commercial business processes, and has been involved in most aspects of business process modeling software, from product management, design, consulting, training, and technical writing. In the last few years, he has been active in the development of business modeling standards, was the primary editor of the BPMN 1.0 and BPMN 2.0 specifications.

714-319-1556
sawhite@bpmadvantage
.com

63 Edenbrook
Irvine, CA
92620

Experience

President, BPM Advantage Consulting, Inc — 2015-Present

Irvine, CA

Steve brings this experience, as well as his general BPM background for a number of consulting services, including: Training (especially BPMN); business process analysis; process architecture; defining process relationships to the larger business architecture context; defining process relationships to service modeling. Steve has been active in the OMG as a sub-contractor for the Veterans Health Administration in the development of methods for formal modeling of healthcare clinical guidelines.

Adjunct Professor, School of Business, Stevens Institute of Technology — 2017-Present

Irvine, CA

Steve teaches an online class on Process Innovation & Management. The goals of the class are to enable the students to identify business processes, master techniques for process modeling and improvement, understand the role of information technology in Business Processes and knowledge work.

BPM Architect, IBM — 2003-2015

Irvine, CA

Designer for BPM Software: Blueworks Live, Process Designer (BPM Lombardi), Process Portal, Process Center. Managed Smarter Process User Research Projects. IBM representative in Standards: On BPMI Board of Directors; Chair of BPMI Notation Working Group; Author/Editor of BPMN 1.0 Technical Specification; Chair of OMG FTF for BPMN 1.1 (Spec Editor); Chair of OMG RTF for BPMN 1.2 (Spec Editor); Co-Author/Editor of BPMN 2.0 Technical Specification; Co-Chair of OMG FTF for BPMN 2.0 (Spec Editor and Project Manager); Contributor to OMG CMMN 1.0 specification. Blogger on BlueWorks for BPM Standards. Published various white papers on BPMN. Co-Authored Book "BPMN Modeling and Reference Guide." Member of team that developed the test for "IBM Certification Test 000-189 - Blueworks Live; Business Process Manager Express or Standard Edition V7.5.1.

BPM Standards Manager; SeeBeyond Corp – 2000-2003

Monrovia, CA

SeeBeyond Standards representative in OMG, OASIS, BPMI, W3C Board of Directors, BPMI. Chair of BPMI Notation Working Group. Project Manager and Author/Editor of BPMN 1.0.

Product Manager, Holosofx – 1994-2000

El Segundo, CA

Product Management. Customer Support. Sales Support. Training, Consulting. Technical Writing. Software Design.

Research Scientist, Perceptronics – 1989-1994

Woodland Hills, CA

Technical Reports for Government Programs Technical Sales and Design for Process Modeling Tool.

Publications

BPM+ Health Community: Stephen A. White (Contributor): Field Guide to Shareable Clinical Pathways Version 2.0. Dec. 2019.

OMG Healthcare Domain Task Force: Stephen A. White (Contributor): Field Guide to Shareable Clinical Pathways Version 1.0. Apr. 2018.

Stephen A. White. Presentation at Qualiware User Conference: Digitalizing Your Business Processes. Feb, 2017.

Stephen A. White. Presentation at Building Business Capability Conference: How can Process Architecture be used to Reduce Organizational Process Complexity. Nov, 2016.

Paul Harmon, Roger Tregear (editors): Stephen A. White (Contributor): Questioning BPM? Meghan-Kiffer Press (January 11, 2016) ISBN-13: 978-0929652542

Mark von Rosing, Stephen A. White, Fred Cummings, Henk de Man: Chapter: Business Process Modeling Notation - BPMN in book: The Complete Business Process Handbook: Vol I, Morgan Kaufmann, 2014, ISBN/ISSN: 978-0127999593

Stephen A. White, Conrad Bock: Chapter: New Capabilities for Process Modeling in BPMN 2.0, in book: BPMN 2.0 Handbook: Second Edition, Future Strategies, Incorporated, 2011, ISBN/ISSN: 098497640X

Stephen A. White: BPMN 2.0 Advances Process Modeling, in: Online Journal, IBM BlueWorks, 2010

Stephen A. White, Conrad Bock: Chapter: New Capabilities for Process and Interaction Modeling in BPMN 2, in book: BPMN 2.0 Handbook, Future Strategies, Incorporated, 2010, ISBN/ISSN: 0981987036

Stephen A. White, Derek Miers: Book: BPMN Modeling and Reference Guide, Future Strategies, Inc., 2008, ISBN/ISSN: 0977752720

Stephen A. White: Chapter: BPMN and BPEL, in Book: Workflow Handbook (anthology), Future Strategies, Inc., 2005, ISBN/ISSN: 0970350988

Stephen A. White: Chapter: Process Modeling Notations and Workflow Patterns, in book: Workflow Handbook (anthology) and Journal, Future Strategies, Inc., and BP Trends, 2004, ISBN/ISSN: 0970350961

Stephen A. White: Introduction to BPMN, in: Journal, BP Trends, 2004

Education

- **UCLA — Ph.D. Cognitive Psychology**
- **IBM Certified BPM Analyst in Blueworks Live; Business Process Manager Express or Standard Edition V7.5.1**
IBM, United States of America
- **IBM Certified BPM Analyst in Blueworks Live; Business Process Manager Express or Standard Edition V8.0**
IBM, United States of America
- **OMG OCEB BPMN Certification**

References

Manager: Process & Metrics Excellence Team
Large Financial Management Firm
Contact details upon request

Alistair Barros
Head of Service Science Discipline
Information Systems School
Science and Engineering Faculty
Queensland University of Technology
alistair.barros@qut.edu.au
+61 (0)7 3138 1199

Conrad Bock
Computer Scientist
National Institute of Standards and Technology (NIST)
conrad.bock@nist.gov
1-301-975-3818

Denis Gagne
Founder - Trisotech
Principal and Evangelist at www.BusinessProcessIncubator.com
dgagne@trisotech.com
1-514-758-6639

JAY WOODRUFF
(973) 873-8203
woodruff.jay@gmail.com

I am an editor and a writer with extensive creative storytelling experience. My work, in both digital and print, has earned numerous honors, including multiple National Magazine Awards. I produce a wide variety of stories (short news items, full-length features, photo essays, data visualizations, humor pieces, and ambitious editorial packages) that all aim to connect with significant numbers of readers.

FAST COMPANY, New York, NY

Senior Editor

08/2017 to present

Member of senior editorial team at the leading publication focused on business innovation

- Assign and edit articles and features for print and online
- Plan and edit the big, annual franchise print packages (World Changing Ideas, Innovation by Design, Next Big Things In Tech, Brands That Matter)
- Write features and articles for print and online, including the back page humor piece
- Lead panels and conduct main stage interviews for Fast Company events (MIC Summit, Innovation Festival, Impact Council)
- Co-created and manage annual Best Workplaces for Innovators recognition program
- Recruit writers who produce original online stories

AFFINITY RESOURCE GROUP, Bloomfield, NJ

Partner

05/2011 to 08/2017

Co-founder of recruiting firm focused on helping companies build their content and product teams

- Client roster included companies in all lifecycle stages: hyper-growth unicorn startups (Jet.com), mature Fortune 500 giants adapting to digital transformation (Johnson & Johnson), post-IPO's (Tremor Video), acquisition targets (Worldnow), post-acquisitions (Realtor.com)

ALPHA MEDIA GROUP, New York, NY

Chief Content Officer/Senior Vice President of Digital

07/2008 to 05/2011

Alpha Media Group was a private-equity-owned company operating the media brands Maxim, Blender and Stuff.

- Redefined and executed overall digital strategy
- Increased overall traffic from 1.1mm to more than 6.1mm monthly unique visitors via SEO, social amplification, traffic partnerships with Yahoo, College Humor, and Sports Illustrated
- Launched brand-first applications for iPhone and iPad, as well as Android-based phones and tablets
- Launched Maxim's first social shopping initiative and first social gaming partnership
- Managed a team of more than two dozen; completed editorial integration between print and digital staffs, saving more than \$500k per year in cost

ENTERTAINMENT WEEKLY, New York, NY

Managing Editor of EW.com (Feb 2006-April 2008)

- Grew bi-coastal staff from ten to two dozen
- Increased daily original online-exclusive content by more than 100%
- Grew audience and engagement (page views rose by more than 200%)
- Directed a top-to-bottom redesign of the site, introduced exclusive video, expanded user generated content, achieved full integration between print and digital staffs
- EW.com was named Website of the Year (2007) by the Magazine Publishers of America and earned plaudits from Adweek and AdAge

Assistant Managing Editor of the magazine (Jan 2003-Feb 2006)

- Directed the redesign of the News & Notes section
- Led the magazine's movie coverage
- Oversaw and directed the mix of stories in the feature well
- Assigned and edited all "bonus" feature stories
- Edited special issues (The Power Issue, The Photo Issue, the Movie Preview issues)
- Wrote features on the culture wars and writer Tobias Wolff

Senior Editor (July 2000-Jan 2003)

- Directed the movie review section and edited special issues (Movie Previews, It List, Power)
- Oversaw the National Magazine Award submission process, resulting in numerous National Magazine Award nominations and a win for General Excellence (2002)

ESQUIRE MAGAZINE, New York, NY

Senior Editor

01/1998 to 07/2000

Assigned and edited articles, feature stories, and special packages

- Recruited and edited film critic Tom Carson, who won a National Magazine Award, the first of many Esquire ASME wins under EIC David Granger
- Created the Portfolio (finance) section and Food section
- Discovered and acquired three previously unpublished stories by the American short story master Raymond Carver, one of them ("Kindling") earning an O. Henry Prize

DOUBLETAKE MAGAZINE, Durham, NC

Managing Editor

08/1993 to 07/1996

Published out of Duke University's Center for Documentary Studies, DoubleTake became one of the largest literary quarterlies in America and won the National Magazine Award for General Excellence in 1998.

- Managed and coordinated the creation and launch, growing staff from zero to nearly three dozen
- Acquired and edited award-winning fiction, nonfiction and poetry from some of the world's most acclaimed writers

TEACHING EXPERIENCE

Adjunct, Stevens Institute of Technology, 2021-present
Adjunct, Montclair State University
Lecturer, Duke University
Adjunct, Webster University
Teaching Fellow, Harvard University
Graduate Instructor, University of Iowa

PUBLICATIONS

Articles, columns, essays and features: *The New York Times*, *Esquire*, *Horizon*, *Entertainment Weekly*, *Fast Company*, *GQ*, *Columbia Journalism Review*, *Christian Science Monitor*, *The Riverfront Times*

Fiction: *The Atlantic*, *Between C&D*, *Story*, *Greensboro Review*, *Seattle Review*, *Whitefish Review*, *Boston Phoenix*

Books: *A Piece of Work* (University of Iowa), *Conversations with Robert Coles* (University Press of Mississippi), *Brothers* (Hyperion)

EDUCATION

MFA, fiction, University of Iowa Writers Workshop, Iowa City, IA
AB, English, Harvard University, Cambridge, MA

JIE XU

Email: jxu94@stevens.edu

Skills: SQL, R, Python, Tableau, MATLAB, Adobe Analytics, EXCEL, Dataiku, FORTRAN, JAVA

Experience with: Exploratory Data Analysis, Forecasting, Regression Analysis, Text Analysis, A/B Test, Machine Learning, Statistical Analysis, Business Analytics, Predictive Modeling, Operations Management, Supply Chain Management, Risk Analysis, Decision Analysis, Optimization, Game Theory

EDUCATION

University at Buffalo, The State University of New York, Buffalo, NY, USA, 2013
Ph.D. in Industrial and System Engineering / Operations Research

Shanghai University, Shanghai, China, 2010
M.S. in Management Information Systems / Supply Chain Management

Qingdao University, Qingdao, China, 2007
B.S. in Management Information Systems

CERTIFICATION

DataCamp 2023
Data Scientist with Python

Coursera 2014
Specialization in Data Science

PROFESSIONAL EXPERIENCE

TD Bank, Jersey City/New York, United States 2023 – 2024
Marketing Analytics

Morgan Stanley, Jersey City/New York, United States 2023
Marketing Analytics in Wealth Management

University of Texas at Austin, Austin, TX, United States 2015 – 2017
Postdoctoral Researcher and Research Assistant

Neuric Technologies Llc, Austin, TX, United States 2014
Business Consultant

SUNY Buffalo, Buffalo, NY, United States 2010 – 2014
Teaching & Research Assistant

PUBLICATIONS

- Xu J., J. Zhuang and Z. Liu. Modeling and Mitigating the Effects of Supply Chain Disruption in a Defender-attacker Game, *Annals of Operations Research*, 236(1), 255-270, 2016.
- Xu J. and J. Zhuang. Modeling Costly Learning and Counter-learning in a Defender-attacker Game with Private Defender Information, *Annals of Operations Research*, 236(1), 271-289, 2016.

ZHIYUAN YAO

444 WASHINGTON BLVD, JERSEY CITY, NJ 07310
+1-551-225-9436 ◊ yaozhiyuan941225@gmail.com

PROFILE

I am currently a Ph.D. student in Financial Engineering and apply for the position of instructor of FE520.

- Competent and skilled programmer in Python, C++, R, SQL, Matlab.
- Excellent ability in Windows and Linux.
- Extensive experience translating theoretical knowledge onto practical, real-world projects.
- Wide-ranging research experience; proven ability to work within teams to cooperatively achieve goals.

EDUCATION

- Expected 05/2023* **STEVENS INSTITUTE OF TECHNOLOGY, HOBOKEN, NJ**
Ph.D. in Financial Engineering;
GPA: 4.0/4.0
- 09/2017 - 05/2019* **STEVENS INSTITUTE OF TECHNOLOGY, HOBOKEN, NJ**
Master of Science in Financial Engineering;
GPA: 4.0/4.0
- 08/2013 - 06/2017* **NANKAI UNIVERSITY, TIANJIN, CHINA**
Bachelor of Science in Mathematics and Applied Mathematics;
GPA: 82/100; Rank: 35/88

EXPERIENCE

- 09/2017 - Present* **RESEARCH ASSISTANT & INSTRUCTOR HANLON FINANCIAL SYSTEM LAB , HOBOKEN, NJ**
- Research on deep reinforcement learning (RL).
 - Developing ROS-based distributed simulation system for RL.
 - Implementing RL algorithms (PPO, Q-Plan, etc.)
 - Controlling robotic agents across internet by RL models.
 - Instructor for *FE520 Introduction to Python for Financial Applications*
- 05/2018 - Present* **GRADUATE RESEARCHER STEVENS INSTITUTE OF TECHNOLOGY & CLEARPOOL GROUP , HOBOKEN, NJ**
- Research on dark pool liquidity detection.
 - Re-sampling data from imbalanced data.
 - Selecting features from categorical and continuous data (Target encoding, Mutual information).
 - Using ensemble machine learning techniques (Stacking, Boosting) to predict liquidity.
 - Evaluating liquidity signals generated by last order in different venues.
- 06/2016 - 11/2017* **INTERN AND QUANTITATIVE RESEARCH CONSULTANT WORLDQUANT LLC , BEIJING, CHINA**
- Research on technical alpha strategies for stocks with top liquidity in U.S. stock market.
 - Developing alpha strategies based on fundamental analysis and analytical data.
 - Applying machine learning algorithms to alpha strategy development on web based strategy back-testing system.

SELECTED PROJECTS

- 09/2017 - Present* **ROBOTICS APPLICATIONS PLATFORM INTEGRATED DEVELOPMENT**

- Create an intelligent system which can control both simulated and physical robot.
- Allow user to control agents across internet and to stream camera input from agent to control side.
- It is compatible with ROS interface and is a perfect simulation system for testing reinforcement learning algorithms on vanilla and partial-observed locomotion tasks.
- Some main-stream RL algorithms have been implemented and tested on our system.

09/2018 - Present **10-K FORM FRAUD DETECTION BY TEXT ANALYSIS AND DEEP LEARNING**

- Evaluate the probability that a company may fraud on its 10-k form by analyzing 10-k text description.
- Give a list of words/phrases that implies fraud statement.
- Mark paragraphs that are highly likely to be fraud by attention model.

03/2018 - Present **DARK POOL LIQUIDITY DETECTION: [PDF]**

- Used re-sampling technique to generate effective data from highly unbalanced data.
- Selected features from categorical and continuous data (Target encoding, Mutual information).
- Used ensemble machine learning techniques (Stacking, Boosting) to predict liquidity.
- Evaluated liquidity signals generated by last order in different venues.
- Used reinforcement learning approach to detect transition pattern of liquidity.

11/2016 - 05/2017 **QUANTITATIVE INVESTMENT WITH MACHINE LEARNING: [PDF in Chinese]**

- Created Multi-factors Stock Selection Model based on Random Forest.
- Selected features from P&V, fundamental, analytical fields by RankIC and t-test.
- Dynamically trained model and forecasting in Chinese stock market.

10/2016 - 01/2017 **APPLICATION AND MODIFICATION OF BP NEURAL NETWORKS**

- Solved divergence and convergence in local minima issues of multi hidden layers neural network by adding momentum and penalty to loss function.
- Selected learning rate automatically to speed up training process by optimization techniques like Armijo rule.

01/2017 **INTERDISCIPLINARY CONTEST IN MODELING: [PDF]**

- Analyzed the long and unpredictable security checking time problem in U.S. airport with both Queuing Model ($M/E_k/1$) and Monte-Carlo simulation.
- Gave practical suggestions about dynamic operation strategy on airport security checking.

02/2016 - 05/2016 **ASSESSMENT ON PSEUDO-RANDOM NUMBER GENERATORS: [PDF in Chinese]**

- Implemented and statistically analyzed the performance and randomness of major families of uniform-distributed generators.

02/2016 **WATER SUPPLY ABILITY ASSESSMENT MODEL: [PDF]**

- Selected features by TOPSIS method to find factors that affect water supply ability from thousands of factors.
- Predicted the change of such ability by Grey Prediction.

09/2015 **IDENTIFICATION OF GEOGRAPHICAL LOCATION FROM SUN SHADOW**

- Identified a location by a sequence data of shadow using a hybrid model of sun altitude model and solid geometry.
- Found the global and local optimal parameters by gradient descent.

AWARDS

05/2019 **OUTSTANDING ACADEMIC ACHIEVEMENT AWARD, STEVENS INSTITUTE OF TECHNOLOGY**

08/2017 **MASTER'S FELLOWSHIP AWARD, STEVENS INSTITUTE OF TECHNOLOGY**

05/2017 **MERIT STUDENT & STUDENT CADRE AWARD, NANKAI UNIVERSITY**

04/2017 **MERITORIOUS WINNER, INTERDISCIPLINARY CONTEST IN MODELING, COMAP**

05/2016 **GOLD MEDAL**, WORLDQUANT CHALLENGE, WORLDQUANT LLC

04/2016 **HONORABLE MENTION**, INTERDISCIPLINARY CONTEST IN MODELING, COMAP

10/2015 **1ST PRIZE**, CHINA UNDERGRADUATE MATHEMATICAL CONTEST IN MODELING,
AWARDED BY CSIAM

12/2014 **OUTSTANDING CHAIRMAN**, STUDENT UNION, NANKAI UNIVERSITY

05/2014 **EXCELLENT TEENAGER IN SPORT**, TIANJIN MUNICIPAL EDUCATION
COMMISSION

11/2013 **3RD-CLASS UNIVERSITY SCHOLARSHIP**, NANKAI UNIVERSITY

Mingsong Ye

(551) 247-7721 • mye2@stevens.edu

School of Business, Stevens Institute of Technology
1 Castle Point Terrace, Hoboken, New Jersey, NJ, 07307

EDUCATION

Stevens Institute of Technology, New Jersey, NJ

2018 – Present

Ph.D. Candidate in Data Science, GPA: 3.6/4.0

Dissertation: ML/AI application to Optimization and Time Series Forecasting

Advisors: Dr. Edward Stohr

Relevant Courses: Statistical Learning, Causality Inference, Algorithm Complexity, Data Structure & Algorithms, Deep Learning, Web Mining

Stevens Institute of Technology, New Jersey, NJ

2016 – 2018

M.S., Optimization and Stochastic System, GPA: 4.0/4.0

Relevant Courses: Real Analysis, Probability, Stochastic Process, Mathematical Analysis, Multivariate Analysis, Convex Optimization, Stochastic Programming

Harbin Institute of Technology, Harbin, Heilongjiang

2011 – 2015

B.S., Applied Math, GPA: 3.38/4.0

Relevant Courses: Mathematic Analysis I & II, Statistics, Topology, Linear Algebra, Linear Regression, Group Theory, Database System, Data Structure, Elementary Probability and Stochastic Process

WORK EXPERIENCE

Stevens Institute of Technology, New Jersey, NJ

2019 – Present

Instructor, Research and Teaching Assistant, School of Business

- ◆ Research on ML/AI application to integer programming and mixed-integer programming
- ◆ Research on Deep learning application to financial time series forecasting
- ◆ Give lectures and mentor graduate students

CODING EXPERIENCE

Python

4 years

- ◆ Web mining using BeautifulSoup4
- ◆ Time series analysis using Arch and NumPy
- ◆ Deep Learning embedding time series data using PyTorch, PytorchLighting, and Scikit-learn
- ◆ Data processes using Pandas, SQLAlchemy
- ◆ Large optimization problem solver using CVXPY and Gurobi python API.
- ◆ Visualization using Seaborn and Matplotlib
- ◆ Prompt engineering using OpenAI API

Database and cloud server

2 years

- ◆ PostgreSQL, course instruction
- ◆ Google cloud API and AWS API to host personal server for numeric experiments

Other Experience on scientific computing & statistics

- ◆ MATLAB
- ◆ R
- ◆ Stata
- ◆ Julia

RESEARCH

Conference

1. Dentecheva, D., Ye, M., & Yi Y. (2022). Risk-averse Sequential Decision Problem with Time-consistent Stochastic Dominance Constraint. *IEEE conference on decision and control (CDC)*
2. Ye, M., (2023). Portfolio Diversification based on Stochastic Dominance and Relaxed Comonotonicity. *International Conference on Stochastic Programming (ICSP)*.
3. Moazeni S., Ye, M. (2019). Data-driven Sensitive Analysis for Robust Optimization. *Modeling and Optimization: Theory and Applications (MOPTA)*

Master Thesis

Ye, M. (2018). Conditional stochastic dominance for the extended two-stage stochastic optimization problems, M. Sc., Stevens Institute of Technology, Mathematic Department

Research in Progress

Deep Learning uncertainty quantification on financial time series data, waiting for submission.

Other Involved Research

1. “Stock Movement Prediction with ChatGPT assisted Network Graph”
2. “Machine Learning Approach to Generate Shadow Price for Column Generation Algorithm”

TEACHING EXPERIENCE

Instructor (Stevens Institute of Technology)

BIA632: Database Management (M.S.), Fall 2022
BIA632: Database Management (M.S.), Spring 2023

Guest Lecturer and Teaching Assistant (Stevens Institute of Technology)

BIA650: Optimization and Process Analytics (M.S.), 2021 Fall – 2022 Spring
MA660: Probability Theory (M.S.), 2017 Fall

Language

Languages Chinese (native), English (full proficiency)

REFERENCES

Dr. Edward Stohr

Professor
Stevens Institute of Technology
Phone: (201) 993-5592
Email: estohr@stevens.edu

Dr. Lei Nico Zheng

Assistant Professor
University of Massachusetts Boston
Phone: (347) 227-5883
Email: lzheng9@stevens.edu

Dr. Yang Lin

AI Risk Research Scientist Munich-Re HSB
Phone: (917) 930-7106
Email: linyanguyc@gmail.com

Dr. James Morton

Tenure-track Investigator NICHD
Phone: (513) 907-9853
Email: jamietmorton@gmail.com

Yangyang (Shirley) Yu

Apt. 501, 675 Monmouth St,
Jersey City, NJ, United States, 07310

+1 201-710-0982

ShirleyYu0915@outlook.com

Education:

Ph.D. in Data Science, School of Business & Computer Science, Stevens Institute of Technology (Hoboken, NJ) **GPA: 3.93** Present

M.S. in Applied Statistics, College of Arts and Sciences, Syracuse University (Syracuse, NY) **GPA: 3.88** May 2014

B. S. in Applied Mathematics, College of Mathematics and Science, Xiamen University (Xiamen, China) July 2011

Professional Experience:

Research Assistant, Department of Information System, Stevens Institute of Technology (Hoboken, NJ) Aug. 2019-Present

- The current research focus is on the integration of deep learning, active learning, Bayesian statistics, multi-modal learning, and optimization techniques with an emphasis on their applications in human vision.

Data Scientist Intern, Jefferies Financial Group (New York, NY) May. 2021-Aug.2021

- Conducted research to predict Jefferies customers' trading decisions on bonds by leveraging multi-modal information.
- Developed deep learning features for input data of customers, bonds, and historical trading time.
- Constructed a deep fusion tensor factorization model that incorporates deep features from different modalities as side information to predict customers' future trading behaviors.
- Achieved a significant improvement in model accuracy of 3.26% over the previous version in an online test.

Senior Data Analyst, Business Intelligence, Analytics and Data Science, ByteDance (Beijing, China) Oct. 2017-Apr. 2018

- Collaborated with algorithm engineers to design model that quantifies the long-term benefits of vloggers to the TikTok app.
- Optimized the ranking model for popular videos by identifying new influential factors and adjusting model parameters.
- Monitored and evaluated the performance of the ranking model through online testing and achieved a 0.06% improvement in leveraging time of use and a 0.03% increase in daily active users (DAU).

Data Analyst, Marketing Analytics, Personal Capital (San Carlos, CA) Oct. 2015-Aug. 2017

- Cooperated with cross-functional teams to deliver high-quality data analysis solutions that inform strategic decision-making.
- Worked with the marketing team to establish business metrics and conducted quantitative analysis to evaluate the performance of multi-channel marketing campaigns, which were used to inform marketing campaign budget allocation.
- Directly reported to the CMO and prepared dynamic data reports and visualization dashboards using Tableau and Google Analytics to demonstrate KPI performance over time and drive impact and improvement across the company.
- Developed data models that utilized statistical methodology and machine learning techniques to analyze customer behavior and product features, providing valuable data insights to inform product development decisions

Data Intelligence Engineer, BI and Analytics, Dell-EMC (Santa Clara, CA) Jan. 2015-Sept. 2015

- Conducted data mining across unstructured data sources using PySpark to identify data gaps and resolve client issues.
- Applied business logic to data processing and modeling using Alteryx to produce efficient data reports for senior leadership.

Data Scientist Intern, CTO Office & Advanced Development Group, Dell-EMC(Santa Clara, CA) May 2014-Dec. 2014

- Investigated a pattern recognition database system with a capacity of 45 TB to identify product operating conditions and bugs.
- Implemented predictive models and visualization techniques to evaluate the performance of data compression systems

Academic Projects:

Primary Advisor: Prof. Jordan William Suchow

First Impression Prediction on Human Faces using Deep Bayesian Tensor Fusion model and Active Learning Present

- The objective was to establish a quantitative model framework for interpreting the alignment between people's first impression of human faces and machine-generated face representations, and to train the model using active learning to improve alignment efficiently under constrained budgets.
- Implemented the StyleGAN encoder to generate synthetic face images and created deep face features.
- Developed the first impression predictive model using the Bayesian deep tensor fusion model to fuse three-way multi-modal deep features and attention terms that explain interactions between modalities.
- Expanded the application of this framework in the context of limited budgets, achieving satisfying predictions with an optimized trade-off of performance and cost using active learning.
- The tensor fusion model, combined with the active learning strategy, delivered highly precise predicted impression ratings even for new objects compared to a baseline model with substantially less training data.
- Established a budget-friendly framework for modeling social behavioral experimental data containing multi-modal information.

Decentralized Algorithm Design and Deployment for Computational System Optimization Oct. 2019-Dec. 2019

- The goal was to apply a decentralized method to the lesion classification task of 2 TB diabetes images.
- Utilized U-Net for this task and employed gradient descent on each of the 7 servers to optimize model parameters separately.
- Designed a reasonable distributed topological server infrastructure and extracted the weighting matrix from server deployment to summarize and update the averaged gradient for U-Net.
- Achieved a 2.6 times reduction in overall computation time at convergence, while maintaining the same training loss.

Streaming Data Processing and Analysis on MTA Subway System

Nov. 2019-Dec. 2019

- The objective was to develop a real-time analytics system for planning subway trips in New York City using MTA data feeds.
- Conducted ETL for the data stream through Apache Kafka and Spark Streaming, and merged it with static subway station datasets.
- Extracted upcoming schedule, and iteration changes with the scheduler from subway feeds to meet customized user needs.
- Designed user-friendly dynamic visualizations for the MTA data feed to deliver timely travel information in the most efficient way.
- Achieved a significant improvement in the delivery speed and flexibility of analytics results compared to traditional data processing.

Industrial Projects:

Data Modeling Project on Marketing Precisely Targeting and Customer Segmentation (San Carlos, CA) Dec. 2016-Feb. 2017

- The aim was to rank the relevance of personal living and financial condition factors in predicting the likelihood of individuals becoming Personal Capital clients using the Gini Value feature selection method.
- Applied a Random Forest model to the feature set and identified the highest possible factor combination that drive client conversion.
- Refined the model outputs using a tree plot and majority voting, and presented the results as data visualizations and a rule set.
- Employed the insights from the model to precisely direct online and offline marketing campaigns, resulting in a 3.8% increase in the number of clients.

Machine Learning Project on Offline Marketing Channel Information Mapping (San Carlos, CA)

Mar. 2014-May 2017

- Developed a more accurate solution for matching internal client information with direct mail list information in offline channels.
- Expanded the relevant factors considered beyond personal information to include geographic data, and applied a fuzzy matching method to improve the matching accuracy.
- Developed a K-NN supervised learning model to map mail list information to the right converted clients.
- Increased the percentage of internal clients mapped with external direct mail list information by 34%.
- Made the performance of this offline channel trackable and comparable with online channels.

Publications:

Yu, Y. & Suchow, J. W. (under review). Actively learning a Bayesian matrix fusion model with deep side information. INFORMS 2023.

Yu, Y. & Suchow, J. W. (in press). Deep tensor factorization models of first impressions. SVRHM 2022 workshop at NeurIPS 2022.

Yu, Y. & Suchow, J. W. (under review). Actively learning a Bayesian matrix fusion model with deep side information. NeurIPS 2023.

Yu, Y. & Suchow, J. W. (under review). Active Deep Bayesian Matrix Factorization Improves Human Perceptual Prediction. CogSci2023

Talks:

Deep modular co-attention networks for online product matching.

Presented at NEDSI 2022 in Newark, NJ

Deep tensor factorization models of first impressions.

Presented at SVRHM 2022 workshop at NeurIPS 2022

Certificates and Rewards:

Provost Fellowship Funded by Graduate School of SIT

2019 – 2023

Data Science PhD Fellowships Funded by Jefferies (Jefferies Financial Group)

2021 – 2022

SAS Certified Base Programmer for SAS 9

Oct. 2013

Technical Skills:

Programming: Python, C++, Julia, R, SQL, SAS, HTML5, PHP, CSS

Platform: TensorFlow, PyTorch, Tensorflow, Numpyro

Application Skills: Tableau, PySpark, SPARK, HIVE, MapReduce, Google Analytics, MYSQL, Amazon Redshift, PostgreSQL, MS Visio, MS Access, MS Office, SCA, Weka, RapidMiner, Alteryx, Minitab, SPSS

BeiChen Zhang

Tel: 1-862-867-9050

Email: bzhang61@stevens.edu

837 Jersey ave. , Jersey City, NJ, 07310

EDUCATION

Stevens Institute of Technology

Major: Master of Financial Engineering

GPA: 3.9/4

Sep 2018- May 2020

Major: Ph.D. in Financial Engineering

GPA: 3.8/4

Sep 2020 – now

Miami University

Double Major: Bachelor of Mathematics and Statistics (Bachelor of Science)

Bachelor of Economics (Bachelor of Arts)

Minor: Actuarial Science (Bachelor of Science)

GPA: 3.0/4

Sep 2014- May 2018

Awards and Scholarships: The first prize for WISE math match (2014 March); The second prize for WISE physical match two times (2014 March); The second prize for WISE math match (2014 may); Name to Dean's List at Miami University (2017 may)

Related courses: FE610, FE620, FE621, FE622, FE630, FE535, FE570, FE670, FE680, FE900

- **Research Projects:** tournament Scheduling, responsible for research, creation, presentation
Financial risk analysis, Cryptocurrency market analysis
- **Work experience:** Zhejiang Post and Telecommunication Changchun Branch (China)
 - **Main responsibility:**
 - ◆ 1. Responsible for the daily production report, the company owned vehicle usage report, and the daily necessities purchasing work
 - ◆ 2. Responsible for information data, reports, income and expenditure statistics,
 - ◆ 3. Business comprehensive report
- **Economic Teacher Assistant:** holding office hours once a week, answering questions outside of classroom
- **Financial Engineering Teacher Assistant:** core course FE610, FE620, FE630, FE621, FA550, FA590...

-
- *Extra curriculum activities*
 - **Student Christian Fellowship _TEAM (2020 – now)**
 - **Activity content: Alpha Phi Omega (2016 August – 2018),**
Main responsibility: Serving the community campus and nation wise at a limit number of hour
 - **Activity content: economic community (2014 August – 2018)**
Main responsibility: Meeting weekly, discussing interesting topic in economics, careers in economics. Receive speeches from members of related company, gain knowledge of the career
 - **Activity content: actuarial community (2015 February)**
Main responsibility: communicating about professional knowledge and participating presentation
 - **Give speech on Economics International Student Panel, Miami University Nov. 2017**

SKILL

Language skills: GRE: V: 153 Q: 165 A: 3.0 overall: 321

IT skills: Python, R, excel, JAVA, statistic, STATA

Other certificates: saxophone certificate, taekwondo certificate

Hobbies: saxophone, boxing, yoga, hiking, tennis, swimming

Curriculum Vitae

Siqi Zhang

siqi.zhang.career@outlook.com

Education

University of Maryland / MS Marketing Analytics / 2016 - 2017

Michigan State University / BA Advertising / 2009 - 2014

Software

- **psyphr** (in development): tidy, organize and visualize physiological measurements, e.g. heart rate variability, skin conductance, etc.
 - **Q7**: a type system for postmodern OOP
 - **mod**: a lightweight module system
 - **rolldown**: a RMarkdown extension for “scrollytelling”
-
-

Work

Bayer Healthcare

Computational Analyst / Whippany, NJ / Nov 2019 - Present

- SAS to R migration and interoperation
- Modularized Shiny applications
- Familiar with SDTM & ADaM data models and clinical trial design & reporting

Freelance R Developer

(Remote) / Nov 2018 - Present

- Custom R solutions on systems integration, data manipulation and report generation
- Shiny applications; Web API with plumbR

DataCamp

Author / (Remote) / Dec 2018 - Apr 2019

- Study and profile analytical solutions with R and Python
- Develop and test online learning practice contents for existing courses
 - e.g. [Working with Dates and Times in R](#)

Metaphor

Master Generalist in Analytics / Garden City, NY / Nov 2017 - Sep 2018

- Digital marketing and analytic strategies for clients in consumer goods industry
- Develop and maintain a data management utility, including API clients for digital marketing platforms using httr, with a Shiny reporting interface
- A/B tests on client websites, improving creative designs and ad buying
- Lifecycle analysis with product sales, return and specification data to support product planning & design

Universal McCann, IPG Mediabrands

Senior Analyst, Performance Analytics / New York, NY / July - Oct 2017

- Design database schema and data migration plans on MS SQL Server
- Make a data encapsulation and versioning solution for transformation and exploratory analysis with R6
- Build client-specific ETL pipelines & automation, quality assurance routines and dashboards
- Train and update models with caret and Rstanarm
- Develop a Shiny app to build scenario simulation with from model parameters

R.H. Smith School of Business, University of Maryland

Graduate Assistant / College Park, MD / Sep 2016 - Apr 2017

- Proctor and grade undergraduate exams
- Tutor undergraduate student on statistics and R programming

CR Snow Brewery

CRM Analyst / Shanghai, China / Jan - Dec 2015

- Query, clean, and model with sales data for customer retention, segmentation, and lifetime value
- Serve as a data-driven advisor on DM, SMS, loyalty program, and other customer outreach initiatives
- Make and deliver competitive profile and benchmark in industry analysis

Toyota Motors (China) Investment Company

Marketing Research Associate / Beijing, China / Aug - Dec 2014

- Gather, compile and analyze automotive market trends from public and proprietary sources
- Interactive dashboards with Excel and VBA; Conjoint analysis on consumer survey data

RAPP, Omnicom Group

Account Service Intern / Shanghai, China / Feb - July 2012

- Manage project calendar and timesheet; conduct creative production briefing
 - Monitor and report on account performance
 - Learned and used R for data exploration and preprocessing
-

Specialty, Interest and Skills

Analysis Topics

- Customer lifetime value
- Customer segmentation
- A/B/n testing
- Churn prediction
- Conversion attribution
- Demand/market share forecasting
- Product lifecycle
- Consumer choice
- Survey & experimental design
- ...

Statistical Methods

- regression: GLM, GAM, glmnet, ANOVA
- dimension reduction: PCA, MCA
- clustering: k-means, POPC
- bayesian: MCMC, bandit
- tree: CART, ranger
- ...

Computer Skills

Experienced

I claim expertise on the following.

- R (with Tidyverse)
- SQL (many flavors), MySQL, MS SQL Server

Developing

I know the following beyond the basics, and can solve real problems.

- HTML/CSS, JavaScript (with jQuery), TypeScript
- Python
- Git
- Tableau

Experimental

I study but have not used the following regularly for work.

- React.js, Bootstrap, Sass
- Julia, Clojure, Racket, Haskell, Node.js, Java
- MongoDB, PostgreSQL
- Docker

Retired

I summon the following only when necessitated by the circumstances.

- Awk, Tcl, Perl
- SAS, SPSS, MS Excel/VBA, MS Access
- Subversion (SVN)
- MS Power BI

R Consulting

Consulting projects on R-related issues are welcome; I provide this service at a reasonable rate, remotely or on-site. Please inquire for availability and work samples. *** *a live copy of [this document](#)*

Zheng (John) Xing

Mobile Phone: (201)960-8377

zxing@stevens.edu

Educational Background

- Sep. 2014 to Dec. 2015** Attended Ph.D Program of Financial Engineering (no degree earned)
Stevens Institute of Technology (SIT) – Hoboken, NJ
- Sep. 2012 - May 2014** Degree: Master of Engineering, Computer Engineering (degree earned in June 2016 after deciding not to complete Ph.D)
Stevens Institute of Technology (SIT) – Hoboken, NJ
- Sep. 2007 – Jun. 2011** Degree: Bachelor of Science Major: Electronic Information Science and Technology
Sun Yat-sen University (SYSU) (top 10 in China) -- Guangzhou, China

Work Experience

- Position: Systems Administrator, Hanlon Financial Systems Laboratories, SIT Mar. 2019 - Present
Maintain and develop lab computing facility. Participate in lab projects involving hardware and software developments.
- Position: Instructor of Graduate Course, SIT. Course: Financial Engineering 529 GPU Computing in Finance. Mar. 2022 - Present
Taught graduate students modern machine learning methods with financial applications using high performance computers.
- Position: Server Engineer, Hanlon Financial Systems Laboratories, SIT Sept. 2013 – Feb. 2019
Developed software and hardware for research, administrating computing clusters and storage systems.
- Position: Instructor of Graduate Course, SIT. Course: Financial Engineering 522 C++ Programming in Finance. Jan. 2015 – Dec.2017
Taught graduate students C++ language, applied data structures and algorithms for solving financial engineering problems.
- Position: R&D Engineer (Regular Employee), Product Center, Sugon Co. Aug. 2011 – Jun. 2012
Participated in the R&D procedure of the supercomputer, Nebulae, 2nd fastest computer as listed in the TOP500 2010. Work mainly included motherboard PCB layout, high-performance computing tuning under Linux and peripheral modules design.
- Position: R&D Engineer (Intern) at Product Center Company: Sugon Co. Oct. 2010 – Jun. 2011

Research Interest

- My current research work is focused on hierarchical deep reinforcement learning and its financial applications. With the cloud robotics system we have been developing, we are also trying to apply ideas of temporal abstraction with SMDP to achieve transfer learning and hierarchical learning among a large number of robots and learning agents.

Projects

- Learning Robot Learning 2020 - Present
Deep reinforcement learning Python package for teaching and research.
- fsc.stevens.edu 2019 - Present
Website for the Hanlon Financial Systems Center, SIT.
- General Purpose Cloud Robotics Platform Jan. 2014 - Present
Research project supported by HFSL at Stevens. System Architect, Project Manager and Developer.
Achievements: Robots with Android and Ubuntu on ARM embedded system, local controllers combined with distributed deep RL agents, real-time Video/Audio/General-purpose communication across the Internet, cloud enabled ROS/Gazebo/Mujoco simulations with vision, fast visual navigation, Non-rigid face tracking and face recognition through cloud and so on.
- Robust high speed object tracking based on color information. Frame rate reached about 8 frames per second on 720MHz ARM Sept. 2013 – 2014
processor with 640*480 resolution GUI display.
- Computing cluster hardware, networking and software setting up and performance tuning with Tesla GPU/CUDA, MPI and PBS Oct. 2013 – 2014
Pro under SLES and Ubuntu. VMware Servers setting up with vSphere. SGI NAS storage system setting up with Nexenta system.
- Face detection and gimbal system control based on OpenCV, Linux 3.5 and ARM Cortex-A8. Face detection rate reached about 1 May 2013 – Sep. 2013
second per detection.
- ROSSerial client implementation on STM32. June 2013 - Present
- Course Projects: Online Book Store and Chat App under Android. Multi-robots path planning simulation under ROS with C/C++, Sep. 2012 - May 2013
Python and Gazebo, Face Detection and Video Transmission based on TI's DaVinci DMSoC DM365, Linux 2.6.32 and RTSP, Face Detection Based on Neural Network and Gabor Feature Extraction with Matlab
- Designed 3 automatic robots, 1 semi-automatic robot and ranked top 16 in China in the ABU Asia-Pacific Robot Contest 2010 Oct. 2009 - Aug. 2011
which was a breakthrough for the SYSU. Served as technical consultant for the team in the 2011 ABU Asia-Pacific Robot Contest
- Thesis, Design of KVM Switch, based on USB protocols, I²C protocols, OSD technology and TI's MCU MSP430. Oct. 2010 - May 2011
- Project participator, the Design of Spectrum Sensing Experimental Platform for Cognitive Radio Application Sep. 2009 - May 2011
- Extracurricular project, the Design of Attendance System based on Fingerprint Recognition and GSM, won the second award in the Science and Technology Invention Contest of School of Information Science and Technology, SYSU Nov. 2008
- Extracurricular project, Temperature Control System Based on Auto-tuning PID Control Aug. 2008

Professional Merits and Awards

- Doctoral Fellowship -- Innovation & Entrepreneurship doctoral fellowship from Stevens 2013 - 2015
- Honorable Mention at the National Trial of ABU Asia-Pacific Robot Contest, awarded by CCTV June 2010
- Sun Yat-sen University and Tencent Science and Technology Scholarship for Excellent Academic Performance May 2010
- Second Award in the Science and Technology Invention Contest of School of Information Science and Technology, SYSU Aug. 2008
- University Outstanding Youth League Cadre, awarded by SYSU 2008, 2009, 2010
- Outstanding Student Leader, awarded by School of Information Science and Technology, SYSU 2007, 2008
- Excellent League Branch, awarded by School of Information Science and Technology, SYSU 2007, 2008

Robert Zotti

CURRICULUM VITAE

Summary

With more than 25 years of experience in Information Systems and technical training, Robert is uniquely positioned to integrate academic and practitioner views in solving business problems and addressing business opportunities through information technology. His expertise includes eLearning, management of information systems, project management, software project auditing, and business continuity. His research interests include process management and the use of instructional technologies and pedagogies in the delivery of online courses.

Professional Experience

STEVENS INSTITUTE OF TECHNOLOGY, Hoboken, NJ (January 2003 – present)
Director/Assistant Dean, WebCampus

- Managed a \$3.2 million budget and reported to senior management on progress of online learning programs.
- Conducted operations generating \$12-\$14 million in revenues for each fiscal year between FY2012-24.
- Won nine national distance learning awards on behalf of the university between 2004-2022 (including seven from the USDLA and two from Sloan-C).
- Managed and implemented web conferencing systems, including system migrations (ATT Connect to Wimba, 2008; Wimba to Blackboard, 2013; Blackboard to Zoom, 2016).
- Conceived, planned, and implemented the \$95,000 WebCampus Podcasting Studio project.
- Performed key project management roles during Learning Management System (LMS) migrations (WebCT to Moodle, 2010; Moodle to Canvas, 2016).
- Championed the deployment of integrated LMS applications (LinkedIn Learning, Respondus/Proctorio, Hypothesis, Playposit, Poll Everywhere, TurnItIn).

- Managed a \$90,000 website overhaul project to improve product marketing as well as business process workflow.
- Developed and conducted sales, marketing, and public relations campaigns between 2003-2008, contributing to increased online graduate enrollments (approximately 25% growth each year).
- Served as an expert in online learning best practices at numerous national and international conferences, including Sloan-C and USDLA
- Formed co-marketing and co-development partnerships with companies and professional societies.
- Served as a liaison between the university's online learning unit, the IT Division, vendors, and external consultants.
- Verified quality of online courses through student surveys, interviews, and focus groups.

Independent Consulting

Conducted basic and intermediate training classes for web and Office applications. (2002)

Served on the USDLA Board of Directors (2014-2017)

Developed online continuing education course in online program management for The New School – Manhattan (2015)

Served as member of PMI-NJ Education Outreach Committee (2019-current)

Prudential Financial, Roseland, NJ (August 1989 – January 2002)

Staff programmer/Quality Assurance Analyst

Responsible supporting enterprise wide communication systems and other applications. Included end-user training, program maintenance, business continuity, and application development.

- Audited procedures used by software development teams for compliance with CMM Level 2 standards.
- Led and participated in task forces charged with conducting gap analyses of software development teams. Presented findings to project teams and senior management, showing key process areas in need of remedial action.
- Collected software project team metrics, including quality assurance, test data and production support data. Prepared monthly metrics reports for executives.
- Managed system migrations (moving 70,000 users from the mainframe environment to Lotus Notes).

- Led IT consolidation projects, positioning the company for an orderly shut-down of the VM mainframe environment.
- Led efforts to certify proprietary applications for Year 2000 operations.
- Managed several reengineering efforts to modernize proprietary directory maintenance functions, which decreased the cycle time for adding new accounts, simplified customer support, and eliminated obsolete processes.
- Developed user and administrative documentation, resulting in more consistent customer support.
- Provided troubleshooting and help-desk services.
- Provided training and technical presentations to diverse audiences, from entry-level staff to senior executives.
- Provided input and participation into business continuity planning and execution.

Edison National Historic Site, West Orange, NJ (May 1986 – August 1989)

IT/Maintenance Technician

Responsible for deploying the National Park Service’s Maintenance Management Information System.

Conference Presentations

2024 April 18: AnnotatED 2024 (Virtual)

Presentation: Annotate to Innovate - Interactive Learning in Project Management.

2023 October 25: Annual Online Learning Consortium Conference: Accelerate, Washington, DC.

Presentation: Lessons Learned from 6 Years of Boosted Learning – a Strategy for Promoting Engagement and Connections Between Semesters.

2021 July 20: DTL Conference (Virtual)

Presentation: Boosted Learning – a Post-Semester Strategy for Increasing Student Engagement and Knowledge Retention.

2020 July 21: U.S. Distance Learning Association National Conference (Virtual)

Presentation: Boosted Learning – a Post-Semester Strategy for Increasing Student Engagement and Knowledge Retention.

2019 November 14: 25th Annual Online Learning Consortium Conference: Accelerate, Orlando, FL.

Presentation: Boosted Learning – a Post-Semester Strategy for Increasing Student Engagement and Knowledge Retention.

2019 May 21: U.S. Distance Learning Association National Conference, Nashville, TN.

Presentation: Learning Analytics for Mere Mortals.

2017 May 1: U.S. Distance Learning Association National Conference, Indianapolis, IN.
Presentation: Creating a Video Production Infrastructure for Mere Mortals

2016 November 17: 22nd Annual Online Learning Consortium Conference: Accelerate, Orlando, FL.

Presentation: Lights! Camera! Lecture!

2016 May 12: U.S. Distance Learning Association National Conference, St. Louis, MO.

Presentation: A Look Inside the Operations of the Online Learning Division.

2015 October 15: 21st Annual Online Learning Consortium International Conference, Orlando, FL.

Presentation: The Use of Mobile Technology in Online Courses.

2015 March 25: eLearning Conference 3.0 - Drexel University, Philadelphia, PA.

Presentation: Video Roulette: Making a Deceptively Complex Undertaking Easier for Faculty and More Useful for Students.

2015 January 8: It's a WiFi World: Teaching and Learning with Technology Symposium – Wilmington University, Wilmington, DE.

Presentation: Using Blackboard Collaborate in on-campus courses.

2014 March 27: eLearning Conference 3.0 - Drexel University, Philadelphia, PA.

Presentation: Web Conferencing Technology in Online Courses – a 10-Year Perspective.

2013 November 21: 19th Annual Sloan Consortium – International Conference on Online Learning, Orlando, FL.

Presentation: Balancing Asynchronous and Synchronous Activities – Faculty, Student, and Administrative Viewpoints (with William Stahlin and Allison Ruppino)

2013 April 30: Campus Technology Forum, San Diego, CA.

Presentation: Web Conferencing Applications in Online Classes.

2013 April 19: Mid-Atlantic Meeting of the American Accounting Association, Parsippany, NJ.

Presentation: By the Numbers – Online Graduate Education at Stevens Institute of Technology

2012 April 30: U.S. Distance Learning Association National Conference, St. Louis, MO.

Presentation: The State of Synchronous Teaching Technologies in Online Courses.

2011 November 11: 17th Annual Sloan Consortium – International Conference on Online Learning, Orlando, FL.

Presentation: Finding a Balance - Synchronous vs. Asynchronous Online Instruction.

2011 October : NJEdge Fall Conference, Plainsboro, NJ.

Presentation: Transitioning from Blackboard/WebCT CE8 to Moodle 1.9.

2011 May 3: U.S. Distance Learning Association National Conference, St. Louis, MO.

Presentation: The Quest to Create an Online Learning Community.

2010 November 5: 16th Annual Sloan Consortium – International Conference on Online Learning, Orlando, FL.

Presentation: Promoting an Online Learning Community with High-Quality Publicly-Available Webinars.

2011 May 5: U.S. Distance Learning Association National Conference, St. Louis, MO.

Presentation: Web Conferencing at Stevens Institute of Technology, a 5-Year Perspective.

2009 August 6: The Annual Conference on Distance Teaching and Learning, Madison, WI.

Presentation: A Multi-Dimensional Quality and Assessment Model.

2009 April 28: U.S. Distance Learning Association Annual Conference, St. Louis, MO, FL.

Presentation: Strategies for the Successful Growth of Online Learning Programs.

2007 May 18: China-U.S. Distance Education: Opportunities and Challenges for Global Exchanges in the 21st Century. Hangzhao, China.

Presentation: Quality Assurance in Online Courses – Board Overviews Up Close and Personal.

2006 November 18: 12th Annual Sloan Consortium – International Conference on Online Learning, Orlando, FL.

Presentation: Up Close and Personal – Learning about Your Learners (and Teachers)

2005 November 18: 11th Annual Sloan Consortium – International Conference on Online Learning, Orlando, FL.

Presentation: Strategies for the Successful Growth of Online Learning Programs.

2005 June 22: Collaborative Technologies Conference, NY, NY.

Presentation: Case Study: Next Generation Online Learning (with Wendy Pate).

2004 November 14: 10th Annual Sloan Consortium – International Conference on Online Learning, Orlando, FL.

Presentation: Proctored WebCampus Exams at Stevens Institute of Technology (with Jim Brinton, Thomson-Prometric)

2003 November 16: 9th Annual Sloan Consortium – International Conference on Online Learning, Orlando, FL.

Presentation: Delivering Hybrid Masters Degrees in China.

Book Chapters

In Pursuit of Workflow Breakthroughs Using “Just Enough Process Management.” In “The Flexible Enterprise. Edited by Sushil and Edward Stohr. Springer, New Delhi, 2014.
ISBN 978-81-322-1559-2

Education

Ph.D., Information Management, Stevens Institute of Technology, Hoboken, NJ, 2017.
Thesis: “The Slow Implementation of Web Conferencing Technologies in Online Graduate Classes”

Master of Science, Information Systems (MSIS), Stevens Institute of Technology, Hoboken, NJ, 2000. Thesis: “Data Warehousing and the Quest for Value”