

# Dr. Carl B. Smalls

Winston-Salem, NC 27106

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## EDUCATION

### **KANSAS STATE UNIVERSITY, JOHN E. ROUCHE CENTER for COMMUNITY COLLEGE LEADERSHIP - 2023**

Doctor of Education in Community College Leadership

Honors: The Honor Society of PHI KAPPA PHI

### **HARVARD UNIVERSITY, JOHN F. KENNEDY SCHOOL OF GOVERNMENT - 1999**

Graduate of the Program on Investment Decisions and Behavioral Finance

### **ATLANTA UNIVERSITY, GRADUATE SCHOOL OF BUSINESS - 1988**

Master of Business Administration in Finance and Marketing

*Volkswagen of America Scholar*

### **NORTH CAROLINA A&T STATE UNIVERSITY - 1983**

Bachelor of Science in Textiles

## PROFESSIONAL EXPERIENCE

### **DANVILLE COMMUNITY COLLEGE (DCC) - Danville, VA**

Member of the Virginia Community College System, which serves the city of Danville, Pittsylvania, and Halifax counties. DCC enrolls approximately 3,300 college transfer, career & technical, and non-credit students.

#### **Chief Finance Officer and Vice President of Finance and Administration**

(2023 - Present)

Steward of the college's \$30 million operating budget and supervises the areas of finance and accounting, grants, budgeting, purchasing, information technology, facilities, public safety, and auxiliary enterprises. As the Chief Finance Officer at DCC, provided leadership for the college-wide financial planning and aligned budgets with established institutional goals and strategic plans.

#### **Selected Accomplishments:**

- Oversaw the completion of multiple million-dollar capital projects, which included technology upgrades, installing a state-of-the-art access control system, and campus renovations.
- Led the successful implementation of a new financial reporting system, which included streamlining financial processes, improving data accuracy, and enhancing reporting capabilities.
- Developed and implemented professional development programs for the finance and administration division, resulting in improved skills, higher job satisfaction, and enhanced team performance.
- Served as the lead for 20% of the 72 standards for the ten-year SACSCOC Reaccreditation

### **SOUTHSIDE VIRGINIA COMMUNITY COLLEGE - Albemarle, VA**

Member of the Virginia Community College System, which serves 10 counties with a service area covering approximately 4,200 square miles and enrolls approximately 3,000 college transfer and non-credit students.

#### **Special Assistant to the President**

(2021 Summer)

Responsible for providing executive leadership, development, and management in coordinating and implementing special projects directed by the president.

#### **Selected Accomplishments:**

- Advised the President on best practices for the launching of the new position of Vice President of Advancement
- Created the job description, responsibilities, and role for the new position of Vice President of Advancement
- Developed the strategic plans for the redesigning of the new Department of Advancement

### **VOORHEES GROUP, LLC – Santa Fe, New Mexico**

(2020-2022)

An independent, performance-based consulting firm providing strategic services to help institutions and organizations define, target, and embed new opportunities.

**Research Analyst**

(2021 – 2022)

Responsible for data collection and analysis, market research, report preparation, and stakeholder collaboration and performance monitoring, which includes gathering data from various sources, analyzing market trends, and providing insights that align with the firm's strategic objectives as well as assessing the effectiveness of strategies and initiatives by tracking key performance indicators (KPIs).

**Selected Accomplishments:**

- Performed policy analysis and research for the principal and senior scholar, Dr. Rick Voorhees
- Provided economic impact and data analysis.
- Researched and evaluated colleges' operations.

**GUILFORD TECHNICAL COMMUNITY COLLEGE – Jamestown, NC**

*As a member of the North Carolina Community College system, GTCC is the third largest of the 58 institutions. Serving more than 35,000 students from six campuses and a Small Business Center. The college offers more than 80 programs of study as well as offering associate degrees, diplomas, and certificates. The college also offers noncredit courses in professional development, personal enrichment, job training, career development, and basic education.*

**Coordinator, Inclusion for Impact**

(2023 – 2023)

Responsible for the overall operations of the program, which includes recruitment, mentoring, and placement of interns in faculty positions. Inclusion for Impact is a yearlong internship and professional development program for individuals of color who are prospective full-time faculty at GTCC. The program brings together faculty who are qualified to teach in a broad range of subject areas that reflect the racial and ethnic diversity of GTCC's service area.

**Selected Accomplishments:**

- Recruited and mentored faculty interns.
- Facilitated weekly training sessions in the fall semester to prepare for spring semester teaching.
- Coordinated with department chairs and program heads to arrange two-course teaching loads.
- Trained mentors in equity-mindedness and culturally relevant pedagogy.

**Associate Professor, Business Administration**

(2014 – 2023)

Responsible for course development and delivery, student advising, curriculum development, serving on department and college committees, engaging the community, advising and supporting student organizations related to business administration, and fostering leadership skills and professional development among students.

**Selected Accomplishments:**

- Key faculty member in the business administration department – experienced with distance learning modalities and management.
- Lead instructor and manager of Introduction to Business, the number one offered course in the department.
- Administer and lead instructor of Business Finance, People Skills, and Business Ethics
- Developed a People Skills course to better prepare students for management positions and business decorum.
- Served on the Title III Committee and chaired the Finance subcommittee.

**MORGAN SMALLS SPORTS CONSULTANTS, LLC – Winston-Salem, NC**

*Professional collegiate sports marketing firm that specializes in creating, marketing, and managing revenue enhancement programs around sports properties of HBCUs, other small schools, and Mid-Major conferences.*

**President and CEO**

(2009 - 2023)

Responsible for the overall direction of the firm, which includes strategic leadership, operations oversight, financial management, business development, leadership and team development, industry representation, and risk management.

**Selected Accomplishments:**

- Developed promotional assets for a mobile photo-sharing service for sports teams.
- Increased sponsorship by 86% for the MEAC/Winston-Salem Steering Committee - an annualized value of \$400k
- Created and activated a promotional program for Denny's Restaurant for the 2011 MEAC Basketball Tournament

- Developed strategy for funding a new press box for a mid-major athletic program.
- Launched Ramatize Campaign for WSSU 2011 semi-final football championship game to increase ticket sales and visibility through various social media from the W-S Dash, Downtown W-S, and W-S Chambers of Commerce
- Arranged interview for Head Football Coach through Black Network Television for the 2011 semi-final game.
- Developed and instituted direct selling techniques for athletic programs
- Developed a community grassroots program for the W-S Dash that led to active and ongoing attendance and participation among the African American and Latino communities.

### **PIEDMONT COMMUNITY COLLEGE – Roxboro, NC**

*Member of the North Carolina Community College system, located in north central North Carolina with two campuses: Roxboro, in Person County, and Yanceyville in Caswell County. The college also offers services, instructions, and training at several off-campus sites.*

#### **Director, Small Business Center and Business Incubation**

(2013 - 2014)

Responsible for leading and managing programs designed to support the growth and development of small businesses and startups, which involves strategic planning, program management, community engagement, and providing resources to entrepreneurs.

#### **Selected Accomplishments:**

- Increased small business startups in Caswell County by 300% in five months.
- Launched Loan Revolving Fund (\$160k) for small businesses to increase economic and workforce development.
- Secured over \$50k in external capital for small business clients.
- Decreased payout of guest lecturers by 30% and increased course offerings by 27%
- Developed and rolled out four new seminars/courses for the 2014 Spring semester.
- Increased lease-out of the incubator in Roxboro by 100% in three months

### **WINSTON-SALEM STATE UNIVERSITY – Winston-Salem, NC**

*Constituent of the University of North Carolina system, a historically black public research university with approximately 6,400 students, with over 40 academic majors and 10 graduate degrees. Member of the Central Intercollegiate Athletic Association (CIAA) conference in NCAA Division II sports.*

#### **Associate Athletic Director of Marketing and Fundraising**

(2012 - 2013)

Responsible for developing and executing strategies to enhance the visibility, reputation, and financial support of the athletic programs, which involved marketing and branding, fundraising and development, game day and event marketing, community, and alumni engagement, budget and financial management, strategic planning and analysis, leadership and team development, and compliance and ethics.

#### **Selected Accomplishments:**

- Increased sponsorship by 207% in five months from the prior year with an annualized value of approximately \$250k
- Launched an athletic online store which led to a 383% increase in sales.
- Launched the “iBelieve” Campaign for the football program which generated over 10 million impressions.
- Increased donors club membership by over 55% in six months
- Instituted ticket marketing techniques for the basketball program, leading to increased sales.

### **LAKE SUPERIOR STATE UNIVERSITY – Sault Ste. Marie, MI**

*Michigan's smallest state university with a private-like atmosphere is in the Eastern Upper Peninsula on the border with Ontario with approximately 3,500 students, with over 100 undergraduate degrees and programs.*

#### **Consultant**

(2007 - 2009)

Responsible for strategic planning, fundraising and development, program evaluation, stakeholder engagement, financial management, governance support, policy development, research and analysis, grant and proposal writing, and project management.

#### **Selected Accomplishments:**

- Instituted a \$5.0 million building capital campaign for the School of Business
- Created “best practices” processes for identifying, cultivating, soliciting capital prospects, and managing funds for the LSSU Foundation, Inc.
- Developed plans to increase enrollment, improve retention and student services, and enhance academic quality.

**Associate Professor of Business**

(2007 - 2009)

Responsible for course development and delivery, student advising, curriculum development, serving on department and college committees, engaging the community, and advising and supporting student organizations.

**Selected Accomplishments:**

- A key faculty member in the finance and business department
- Advisor to the Student-Managed Investment Fund
- Sponsored leadership lecture series titled "As a Person Thinketh"
- Academic Advisor to the men's basketball team

**Department Chair, Business, Economics, and Legal Studies**

(2008 - 2009)

Responsible for overseeing the day-to-day operations, faculty, and academic programs of the department.

**Selected accomplishments:**

- Administered curriculum proposals and changes which led to a 12% increase in departmental completion.
- Negotiated articulation agreements with member community colleges, which increased business student enrollment by 23%.
- Initiated the candidacy for the accreditation of the College of Business

**WILMOCO CAPITAL MANAGEMENT, LLC® - Detroit, MI**

*Professional money management firm specializing in managing funds for corporate and public employee pension plans, endowments, foundations, Taft Hartley's, eleemosynary organizations, and high-net-worth individuals.*

**Chief Executive Officer and Managing Director**

(1997 - 2006)

Responsible for the overall management, strategy, and success of the firm, which includes strategic vision and leadership, operational management, board relations, decision-making, financial performance, stakeholder engagement, culture and values, crisis and talent management, innovation and growth, internal communication, and succession planning. Member of the board of directors and chaired the investment management and product policy committees.

**Selected Accomplishments:**

- Ensured portfolio management team adhered to both firm and client investment policies and guidelines, which led to zero infractions during my 10-year tenure.
- Implemented cost-effective measures leading to net profit margins of over 15% per year.
- Launched a new logo, brochure, and website which led to brand awareness on a national level and increased penetration by 20%.

**Senior Vice President and Portfolio Manager**

(1991 - 1997)

Responsible for investment strategy and management, leadership and oversight, client relationship management, financial analysis and reporting, risk management, market research, strategic planning, performance monitoring, compliance and regulation, and stakeholder communication.

**Selected Accomplishments:**

- Raised \$125 million in 18 months from corporate and public pension funds.
- Designed and developed the information technology system, streamlining operations and enhancing productivity.
- Negotiated all contracts which led to the firm's management fees being 40% higher than the industry.
- Developed a hiring system that led to 90% retention of new hires in their first five years of employment.
- Wrote operating manual for the firm which laid out best practices for excellence.
- Managed client relationships with the board of trustees

**UNIVERSITY OF DETROIT MERCY - Detroit, MI**

*Michigan's largest and most comprehensive Catholic University is located in the city of Detroit with approximately 6,000 students, 100 academic degrees, and programs through seven schools and colleges.*

**Adjunct Professor – College of Business Administration**

(2004 - 2007)

Responsible for teaching a variety of graduate and undergraduate finance courses.

**Selected Accomplishments:**

- Demonstrated a strong ability to bridge the gap between theory and application.
- Exclusively taught Financial Management and Personal Finance courses
- Participated in the finance department's curriculum planning.

**Instructor of Finance**

(1991 - 1997)

Responsible for teaching and curriculum development, student engagement and support, assessment and evaluation, research and scholarship, advising and mentoring, administrative duties, professional development, collaboration, and academic service.

**Selected Accomplishments:**

- Demonstrated a strong ability to bridge the gap between theory and application.
- Ranked in the 90<sup>th</sup> percentile consistently in student surveys.
- Lectured exclusively to the delegates from the People's Republic of China in the discipline of finance.
- Academic Advisor for men's and women's basketball teams

**Director of College of Business Administration – Evening and Weekend Programs (campus Dean)**

(1991 - 1996)

Responsible for program development and management, faculty and staff coordination, student recruitment and retention, academic advising and support, budget and resource management, quality assurance and improvement, strategic planning, compliance and accreditation, community and industry engagement, and administrative oversight.

**Selected Accomplishments:**

- Oversaw entire operations, including two administrators and six full-time and ten part-time faculty members.
- Decreased time for non-traditional students to graduate by 30%.
- Increased academic awards for non-traditional students by 85%.
- Played a leadership role in the merger of the evening and weekend programs for the University of Detroit and Mercy College
- Designed and created an operational manual leading to a more student-focused approach.
- Played a key role in curriculum development and articulation agreements.
- Led the college in the completion of two consecutive successful accreditations.
- Lead instructor for the "Chinese Delegate Executive Training Program" offered in Beijing, China

**NATIONAL FOOTBALL LEAGUE**

*The largest professional American football league comprises thirty-two teams from American cities and regions.*

**Lecturer**

(1992 - 2001)

Responsible for providing financial education and guidance tailored to the unique needs and challenges faced by professional athletes, which involved financial education and training, personalized financial planning, financial literacy development, retirement and career transition planning, legal and regulatory compliance, risk management, collaboration with financial advisors, workshops and seminars, confidentiality and trust building, and ongoing support and mentorship.

**Selected Accomplishments:**

- Ranked number one ten years straight amongst thirty-two teams for the most players attending financial seminars.
- Developed the players' program (financial education seminar) for the Detroit Lions, Inc.
- Advised current and retired players from the League on financial matters.

**THE CBS GROUP, LLC - Detroit, MI**

*Investment management firm specializing in investment funds for institutions and high-net-worth individuals.*

**President**

(1990 - 1991)

Responsible for strategic leadership, portfolio management oversight, client relations, compliance and risk management, operational management, team leadership and development, marketing and communication, performance monitoring and reporting, innovation and strategy, and governance and advisory.

**Selected Accomplishments:**

- Directed and implemented policies, objectives, and activities to ensure continuing operations, maximum return on investments, and increased productivity.

- Launched financial education programs to instruct institutions and individuals on how to invest.
- Managed portfolios for high-net-worth individuals
- Negotiated the merger of The Cbs Group, LLC and WILMOCO Capital Management, LLC

### **FORD MOTOR COMPANY – Detroit, MI**

*\$100 billion global automotive company, ranked 3<sup>rd</sup> on Fortune 500 and 2<sup>nd</sup> within the industry. Manufactures and distributes automobiles in 200 markets across six continents and has over 300k employees in 100 plants.*

#### **Senior Financial Analyst – Controller's Office**

(1988 - 1990)

Responsible for financial reporting, budgeting, and forecasting, financial analysis, internal controls and compliance, process improvements, month-end and year-end close, audit support, financial systems management, communication and collaboration, ad hoc reporting, and analysis.

#### **Selected Accomplishments:**

- Developed financial models to track operational expenses for the Ford and Lincoln-Mercury divisions.
- Built business plans to determine profit margin for vehicles sold in North America
- Oversaw the implementation of a \$1.4 billion budget for North American sales operations.
- Consolidated all financial reporting for North America
- Designed a purchase strategy for car rental companies' acquisitions.
- Launched a program to lease vehicles to retail customers.

### **VOLKSWAGEN OF AMERICA - Lanham, MD**

*U.S. subsidiary of the Volkswagen automobile company of Wolfsburg, Germany, a \$25 billion company with approximately 7 percent of the U.S. car market, with over 1,000 dealerships and over 340k employees.*

#### **Market Analyst - Intern**

(1987 Summer)

Responsible for market research, sales performance analysis, demand forecasting, competitive analysis, sales strategy support, customer insights, reporting and presentation, process improvements, collaboration, and ad hoc analysis.

#### **Selected Accomplishments:**

- Designed an allocation system that increased the delivery of vehicles to dealerships by 25%.
- Developed a plan for dealerships to relocate stores in new markets in the northeast region.
- Formulated a marketing strategy to halt the decrease in sales and improve the image of the Audi 5000

## **FACULTY EXPERIENCE**

### **Guilford Technical Community College**

Associate Professor of Business Administration

**Jamestown, NC**

2014-2023

### **Guilford Technical Community College**

Adjunct Professor of Business

**Jamestown, NC**

2013-2014

### **Forsyth Technical Community College**

Guest Lecturer – Small Business Center

**Winston-Salem, NC**

2013-2020

### **Alamance Community College**

Guest Lecturer – Small Business Center

**Burlington, NC**

2015-2019

### **Lake Superior State University**

Associate Professor of Business Administration

**Sault Ste Marie, MI**

2007-2009

Accredited: Candidate for ACBSP – The Ass. of Collegiate Bus. Schools and Programs

**Note:** Includes teaching at **Northern Michigan Community College** and **Bay Community College**

**University of Detroit Mercy**

Adjunct Professor of Finance

Accredited: AACSB Int'l – The Ass. to Advance Collegiate Schools of Bus.

Instructor of Finance

**Detroit, MI**

2004-2007

1991-1997

**Beijing Institute of Technology**

Guest Lecturer

**Beijing, China**

1993 Summer

**Eastern Michigan University**

Adjunct Professor of Finance

Accredited: AACSB Int'l – The Ass. to Advance Collegiate Schools of Bus

**Ypsilanti, MI**

1991 Summer

**COURSES TAUGHT**

|   |   |
|---|---|
| Introduction to Business (undergraduate)*           | Business Policy (undergraduate and MBA) * |
| Business Communication (undergraduate)              | Principles of Insurance (undergraduate)   |
| Personal Finance (undergraduate)*                   | Strategic Policy (undergraduate and MBA)  |
| Financial Management (undergraduate and MBA)*       | Principles of Marketing (undergraduate)   |
| Fundamentals of Investments (undergraduate and MBA) | Principles of Management (undergraduate)  |
| Advanced Investments (undergraduate)                | Business Law (undergraduate)*             |
| Corporate Finance (undergraduate)                   | Small Business Management*                |
| Global Finance (undergraduate)                      | Investment Analysis (undergraduate)       |
| People Skills*                                      |   |

\* = Taught at Community College

**OTHER RELEVANT EXPERIENCE****GUILFORD TECHNICAL COMMUNITY COLLEGE – Jamestown, NC**

*As a member of the North Carolina Community College system, GTCC is the third largest of the 58 institutions. Serving more than 35,000 students from six campuses and a Small Business Center.*

**Student Services Representative**

(2015 – 2023 Summers)

For nine consecutive years, worked in the student services center to gain student services experience in servicing students in various areas, which included recruiting, onboarding, and advising.

**Selected Accomplishments:**

- Advised newly admitted students.
- Assisted prospective students with their applications and financial aid.
- Supported the admission director with recruitment activities.
- Advised returning students about class selections, major changes, and other pertinent matters.

**COLLEGE SERVICE**

- Served as the lead person for the finance division for the ten-year SACSCOC Reaccreditation at DCC
- Served as a Member of the Chancellor's Leadership Initiative at Winston-Salem State University
- Served as Chair of the Accreditation Candidacy Committee at Lake Superior State University
- Served as a Member of the Accreditation Committee at the University of Detroit Mercy
- Served as an Academic Advisor for the University of Detroit Mercy Athletic Department
- Served as an Academic Advisor for the Lake Superior State University Athletic Department

**COMMUNITY SERVICE**

- Served as Chairman of the Small Business Committee for the Roxboro Area Chambers of Commerce
- Served as a Member of the Roxboro Development Group

- Served as a Member of the Roxboro Area Merchants Association
- Served as Judge for the North Carolina Virtual Enterprise International Business Plan Competition
- Served as a Volunteer for the Annual YMCA Mistletoe Run
- Served as a Member Representative of the Super Bowl XL Committee
- Served as a Member Representative of the National Consortium for Academics and Sports
- Served as an Outreach Coordinator at the Center for the Study of Sports
- Served as a Tutor teaching English as a second language to former Burmese refugees.
- Served as a Board of Education Member of Warrendale Charter Academy and as the Treasurer.
- Served as a Board of Directors of Business United with Officers & Youth – 7<sup>th</sup> Precinct (BUOY-7)

### STATE AND NATIONAL SERVICE

- Served as an Advisor and Judge for the Opportunity Funding Corporation (OFC) Venture Challenge business plan competition, including all 28 Historically Black Colleges and Universities (HBCUs) with graduate management programs.
- Served as a Member of The National Association of Securities Professionals (NASP)
- Served as a Member of the National Black MBA Association
- Served as an Advisor to the Ministry of Heavy Machinery and Electronics Industry for the People's Republic of China
- Served on the Board of Directors of the Detroit Heading Company, Inc. as secretary and member of the finance committee.
- Served on the Board of Advisors for the National Association of State Treasurers (NAST)
- Served as a Member of the National Governors Association (NGA)
- Served as a Member of the Republican Governors Association (RGA)
- Served as a Member of the Democratic Governors Association (DGA)

### AWARDS AND RECOGNITION

- Selected as a Lakin Fellow for the Thomas A. Lakin Institute for Mentored Leadership Class of 2024
- Selected to attend the AACC Leadership Suite – Future Presidents Institute, June 2024
- Selected to Participate in the 2019 President's Leadership Seminar at Guilford Technical Community College
- Selected as a Member of the 2014 Person County Leadership Program
- Voted one of Michigan's most powerful African Americans in 2003 by Corp! magazine

### DISSERTATION, ARTICLES & REVIEW

*"Diversity of Community College Trustees: Expanding Opportunities"*. Education Considerations, Vol. 50: No.2, Community College Leadership (2025), Article 5.

*"Paradigm Shift: DEI, Anti-DEI or Underrepresentation?"*. DiverseEducation.com (December 5, 2024), pp. 46-47.

*"Diversity, equity & inclusion: An examination of the lived experiences of African American Trustees within community colleges"* (May 2023).

"The Business Side of Small College Athletics", *Black Business Ink* (August 2013), pp. 23. "The Business of Sports", *The Phoenix Newspaper* (July 2013) pp. 1 and 11. "Sitting on the Sidelines: The Plight of HBCU Athletic Programs", *The Phoenix Newspaper* (September 2010) pp. 1,3, and 11. "Investment Theories: To Which Do Korean Firms Conform?" with S.H. Kim and C. Cho, *Midwest*

*Review of International Business Research* (March 1993), pp. 31-35. Book review on *"Sustaining the Regime: North Korea's Quest for Financial Support"* by Robert Daniel Wallace for the Institute for North Korean Studies.

### SELECTED PRESENTATIONS AND PUBLICATIONS

Keynote Speaker, 2025 Commencement – RISE Academy, George Washington High School, and Adult Education Program, Danville Public Schools. Speaker at the Washington State Association of College Trustees (ACT) 2025 Spring Conference "The Work Still Needs to Be Done: Trustees Impact on Mission, Vision and Values". Speaker at the 2024 ACCT Congress "A State of Affairs: The Underrepresentation of Minority Community College Trustees", October 2024. Speaker at the AACC 2024 Annual Convention "A State of Affairs: The Underrepresentation of Minority Community College Trustees", April 2024. Panel Member for the "Pathways to Economic Recovery Summit" at North Carolina A&T

State University, October 2021. Guest Lecturer for the Small Business Center at Forsyth Technical Community College on "Budgets, Marketing and Public Relations, May 2013. Speaker for SIFE at Lake Superior State University on "Business Ethics", April 2009. Speaker at the 37<sup>th</sup> Annual Michigan State Leadership Conference on "Professional Image", March 2009. Monthly Lecture Series at Lake Superior State University "As A Person Thinketh" Dinner & Discussion with Professor Smalls, 2007-2008 Academic Year. Commencement Speaker for the Advanced Technology Academy, June 2007. Presented at the 1998 "NFL Rookies Symposium for the NFL, 31 teams' Vice Presidents of Players' Programs, and all drafted rookies in Denver, CO, on Financial Education, April 1998.

## **REFERENCES UPON REQUEST**

# Curriculum Vitae

of

**Dr. Carl B. Smalls**

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## EDUCATION AND DEGREES

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|-------------|------|--|
| Ed.D.       | 2023 | Kansas State University<br>John E. Roueche Center for Community College Leadership<br>Major: Community College Leadership<br><i>Doctor of Education (Ed.D.) degree</i> |
| CERTIFICATE | 2014 | Program Management Institute<br>Learning Resources Network<br>Certified Program Planner (CPP)  |
|             | 1999 | Harvard University<br>John F. Kennedy School of Government<br>Program: Investment Decisions and Behavioral Finance   |
| MBA         | 1988 | Atlanta University<br>Graduate School of Business<br>Major: Finance and Marketing<br><i>Volkswagen of America Scholar</i>  |
| BS          | 1983 | North Carolina A&T State University<br>Major: Textiles   |

## ACADEMIC APPOINTMENTS

|   |                                     |
|---|-------------------------------------|
| <b>Danville Community College</b><br>CFO/Vice President of Finance and Administration         | <b>Danville, VA</b><br>2023-Present |
| <b>Guilford Technical Community College</b><br>Coordinator of Inclusion for Impact            | <b>Jamestown, NC</b><br>2023-2023   |
| <b>Southside Virginia Community College</b><br>Special Assistant to the President             | <b>Alberta, VA</b><br>2021 Summer   |
| <b>Guilford Technical Community College</b><br>Associate Professor of Business Administration | <b>Jamestown, NC</b><br>2014-2023   |
| <b>Piedmont Community College</b><br>Director, Small Business Center and Business Incubator   | <b>Roxboro, NC</b><br>2013-2014     |
| <b>Guilford Technical Community College</b><br>Adjunct Professor of Business                  | <b>Jamestown, NC</b><br>2013-2014   |

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|--|---|
| <b>Forsyth Technical Community College</b><br>Guest Lecturer – Small Business Center   | <b>Winston-Salem, NC</b><br>2013-2020                             |
| <b>Alamance Community College</b><br>Guest Lecturer – Small Business Center  | <b>Burlington, NC</b><br>2015-2019                                |
| <b>Winston-Salem State University</b><br>Associate Athletic Director of Marketing & Fundraising  | <b>Winston-Salem, NC</b><br>2012-2013                             |
| <b>Lake Superior State University</b><br>Chair of Department of Business, Economics and Legal Studies<br>Associate Professor of Business Administration<br>Consultant<br>Accredited: Candidate for ACBSP – The Ass. of Collegiate Bus. Schools and Programs<br><b>Note:</b> Includes teaching at <b>Northern Michigan Community College</b> and <b>Bay Community College</b> | <b>Sault Ste Marie, MI</b><br>2008-2009<br>2007-2009<br>2007-2009 |
| <b>University of Detroit Mercy</b><br>Adjunct Professor of Finance<br>Accredited: AACSB Int'l – The Ass. to Advance Collegiate Schools of Bus.   | <b>Detroit, MI</b><br>2004-2007                                   |
| Instructor of Finance  | 1991-1997   |
| Director of College of Business Administration – Evening and Weekend Programs (equivalent to a Campus Dean)  | 1991-1996   |
| <b>Beijing Institute of Technology</b><br>Guest Lecturer   | <b>Beijing, China</b><br>1993 Summer                              |
| <b>Eastern Michigan University</b><br>Adjunct Professor of Finance<br>Accredited: AACSB Int'l – The Ass. to Advance Collegiate Schools of Bus  | <b>Ypsilanti, MI</b><br>1991 Summer                               |

#### **OTHER NON-PROFIT APPOINTMENTS**

|  |                                  |
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| <b>Jerry Long Family YMCA</b><br>Engagement Director - Retention | <b>Clemmons, NC</b><br>2016-2017 |
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#### **SIGNIFICANT PROFESSIONAL EXPERIENCE**

Seasoned Administrator – oversaw operations within both private and public academic institutions.

Extensive work with accreditation bodies, curriculum (programming), student services, workforce, and economic development—wide-range management of distance learning modalities.

Business and Finance Professor for 32 years – taught at private and public institutions.

Economic and Workforce Development Expert.

Business and Financial Executive with nearly 30 years of experience in financial services and marketing.

Worked with sports programs at both the collegiate and professional levels for 25 years.  
 Directed external affairs (marketing and fundraising) for NCAA Division II athletic program.  
 Consulted eleemosynary organizations on fundraising strategies.  
 Seasoned Fundraiser – expert in soliciting high-end prospects.  
 Turnaround Specialist – expert in the stabilization of businesses and programs in transition.  
 Lecture and Advisor for the NFL's Financial Education Players' Program for 10 years.  
 Senior Financial Analyst for Ford Motor Company – oversaw a \$1.4 billion budget.  
 Marketing Internship with Volkswagen of America in 1987.  
 Management expertise in four industries: financial services, higher education, sports, and manufacturing.

### **AFFILIATIONS, MEMBERSHIPS AND AWARDS**

|   |                                      |
|---|--------------------------------------|
| President's Leadership Seminar                        | Guilford Technical Community College |
| Person County Leadership Program                      | Roxboro Area of Chambers of Commerce |
| Chancellor's Leadership Initiative                    | Roxboro Development Group            |
| National Association of Securities Professionals      | Roxboro Area Merchants Association   |
| National Black MBA Association                        | United Way of Roxboro                |
| Michigan's Most Powerful African Americans in 2003 by | Corp! magazine                       |
| Outstanding Young Men of America                      | Future President Institute           |
| Lakin Fellow Institute                                |                                      |

### **DISSERTATION, ARTICLES & REVIEW**

*"Diversity of Community College Trustees: Expanding Opportunities"*. Education Considerations, Vol. 50: No.2, Community College Leadership (2025), Article 5. *"Paradigm Shift: DEI, Anti-DEI or Underrepresentation?"*. DiverseEducation.com (December 5, 2024), pp. 46-47. *"Diversity of Community College Trustees: Expanding Opportunities"* (November 2024). *"Diversity, equity & inclusion: An examination of the lived experiences of African American Trustees within community colleges"* (May 2023). *"The Business Side of Small College Athletics"*, *Black Business Ink* (August 2013), pp. 23. *"The Business of Sports"*, *The Phoenix Newspaper* (July 2013) pp. 1 and 11. *"Sitting on the Sidelines: The Plight of HBCU Athletic Programs"*, *The Phoenix Newspaper* (September 2010) pp. 1,3, and 11. *"Investment Theories: To Which Do Korean Firms Conform?"* with S.H. Kim and C. Cho, *Midwest Review of International Business Research* (March 1993), pp. 31-35. Book review on *"Sustaining the Regime: North Korea's Quest for Financial Support"* by Robert Daniel Wallace for the Institute for North Korean Studies.

### **SELECTED PRESENTATION**

Keynote Speaker, 2025 Commencement – RISE Academy, George Washington High School, and Adult Education Program, Danville Public Schools. Speaker at the Washington State Association of College Trustees (ACT) 2025 Spring Conference "The Work Still Needs to Be Done: Trustees Impact on Mission, Vision and Values". Speaker at the ACCT Leadership Congress (October 2024): "A State of Affairs: The Underrepresentation of Minority Community College Trustees." Speaker at the AACC 2024 Annual Convention, "A State of Affairs: The Underrepresentation of Minority Community College Trustees," April 2024. Panel Member for the "Pathways to Economic Recovery Summit" at North Carolina A&T State University, October 2021. Guest Lecturer for the Small Business Center at Forsyth Technical Community College on "Budgets, Marketing and Public Relations", May 2013. Speaker for SIFE at Lake Superior State University on "Professional Image", March 2009.

Monthly Lecture Series at Lake Superior State University "As A Person Thinketh" Dinner & Discussion with Professor Smalls, 2007-2008 Academic Year. Commencement Speaker for the Advanced Technology Academy, June 2007. Presenter at the 1998 "NFL Rookies Symposium" for the NFL, 31 teams, Vice President of Players' Programs, and all drafted rookies in Denver, CO, on Financial Education, April 1998.

### **SELECTED TRAINING PROGRAM AND OTHER**

Selected to attend the Lakin Fellows Institute – Sponsored by the Presidents' Round Table of African CEOs of Community Colleges, October 2024.

Selected to attend the AACC Leadership Suite – Future Presidents Institute, June 2024.

Selected as a Participate in the 2019 President's Leadership Seminar at Guilford Technical Community College (GTCC)

Serve on the Title III Steering Committee as Co-Chair of the Sub-committee - Financial Literacy Component at GTCC

Served as a Member of the Multicultural and Inclusion Committee at GTCC

Served as a Member of the Student Conduct Appeal Committee at GTCC

Served as Division Chair of the 2014 Small Business - Roxboro United Way Capital Campaign.

Graduate of the 2014 Person County Leadership Program - Roxboro.

Selected as a participant in the 2013 Chancellor's Leadership Initiative Program at Winston-Salem State University.

Served as Chair of the Roxboro Chambers of Commerce Small Business Committee.

Served as Vice Chair of the Marketing Committee for the Small Business Center Network.

Served as a Member of the ProfitCents Users Group Committee for the Small Business Center Network.

Instructor for the "Chinese Delegate Executive Training Program" sponsored by the University of Detroit Mercy in September and October 1992

Outreach Coordinator at the Center for the Study of Sports at the University of Detroit Mercy, a member of the National Consortium for Academics and Sports (NCAS) from 1992-1997

### **COURSES TAUGHT**

|  |   |
|--|---|
| Introduction to Business (undergraduate)*    | Business Policy (undergraduate and MBA) * |
| Business Communication (undergraduate)       | Principles of Insurance (undergraduate)   |
| Personal Finance (undergraduate)*            | Strategic Policy (undergraduate and MBA)  |
| Financial Management (undergraduate and MBA) | Principles of Marketing (undergraduate)   |

|   |  |
|---|--|
| Fundamentals of Investments (undergraduate and MBA) | Principles of Management (undergraduate) |
| Advanced Investments (undergraduate)                | Business Law (undergraduate)*            |
| Corporate Finance (undergraduate)                   | Small Business Management*               |
| Global Finance (undergraduate)                      | Investment Analysis (undergraduate)      |
| People Skills                                       |  |

\* = Taught at Community College