

# Curriculum Vitae

## William J. Oliver

35 Kendall Court, Bedford, MA 01730

781-424-0179

will@wjoliver.com

Dr. Oliver is a practitioner scholar with broad experience leading, researching and teaching financial management.

### Teaching Experience

#### **Professor of Business and Business Program Coordinator, Sattler College** **2019 to Present**

Sattler College is a three-year old niche college providing undergraduate education to members of the Anabaptist and Evangelical Christian communities. Developed curriculum, and organized and supervise faculty. Personally teach a range of courses including data analytics, social entrepreneurship, marketing and organization behavior. Building a social entrepreneurship investment fund to be managed in part by students for the financial benefit of the college.

#### **Lecturer, University of Massachusetts, Amherst** **2018 to Present**

Teach both on-line and classroom courses. Teach Healthcare Data Analytics through a course that introduces students to the exciting new world of machine learning, Internet of Things, cloud data management, security and other key data forces driving change in healthcare today. In addition, students learn Tableau, the leading business intelligence tool. Teach classroom courses in Excel and SQL.

#### **Professor, Pioneer Academics** **2014-present**

Taught on line courses with Columbia University credit for High School students. This global program gives High School students from around the world a chance to earn college credit. In my course, students learned about business model and business model innovation. They wrote well researched papers on the opportunity for smart phone apps to disrupt the healthcare business model in their respective home countries.

#### **Lecturer, Brandeis University, Waltham, MA** **2012-2015**

Taught undergraduate and graduate courses in the International Business School. Taught Business Analytics, an undergraduate course in basic statistics and presentation of analytical findings. Taught a graduate seminar through which students designed and delivered real consulting projects with senior executives of companies in the Boston area and nationally. Taught Functions of the Capitalist Enterprise, which covered a broad range of business skills including ratio analysis, organization, strategy and marketing.

#### **Lecturer, Tufts University Gordon School** **2010**

Taught Entrepreneurship at the undergraduate level. Students include upperclassmen from schools of engineering, liberal arts and international relations. Helped judge Tufts' annual business plan contest.

#### **Lecturer, University of California, Irvine CA** **2009-2010**

Taught New Venture Management to the executive MBA program for healthcare professionals. Used cases, lectures and invited speakers to teach the management aspects of how to build and run a small business.

#### **Adjunct Professor, Gordon College, Wenham MA** **2007-2008**

Taught Small Business Development. This emphasized venture management as well as new venture creation. Students developed a full business plan and presented it to a panel of venture capitalists and serial entrepreneurs. Received high class ratings.

#### **Adjunct Professor, Sawyer Graduate School of Management, Suffolk University, Boston MA** **1991-1993**

Taught a graduate course in Information Technology for Finance. The University brought me in to radically improve this required course, making it more challenging and relevant to the challenges business leaders face managing IT. I rebuilt the course outline around readings, case studies and a term project. The course was very successful, and I received top evaluations from the students. Business travel prevented me from continuing beyond my second year.

## Business Experience

### **The Stephen Group, Manchester, NH**

**2010 to present**

Lead projects to improve government healthcare agencies through policy, process and systems innovation. Worked with Commissioners in Florida, Texas and Mississippi. In Arkansas, worked with a legislative task force to assess the impact of the Affordable Care Act, and redesign a new approach for the State. In Florida, led a team to develop data analytics tool that prioritizes case work for Medicaid and other benefits. In Mississippi, recommended over 100 systems and process improvements the State is now implementing. In Texas recommended nearly 200 systems, policy, training and process improvements. The state has made great headway on the recommendations and is now entering year two of the resulting statewide “transformation” program led by the Commissioner.

### **The Lucas Group, Boston, MA: Director**

**2005-2010**

Built a consulting practice that reduces cost of state governments. Managed a 25 person team to modernize welfare administration in the State of Indiana, through public private partnership. Worked with the governor of Illinois to identify \$3 billion in annual cost reductions, largely through improvement of medical benefits policy and administration. Worked with the governor of Missouri to launch initiative to achieve \$150 million in low-risk cost reduction opportunities. Worked with Missouri’s welfare Secretary to develop a multi-year improvement program. Launched 11 sweeping change initiatives to revolutionize Pennsylvania’s Office of Income Maintenance.

### **BridgeHRO, Inc., Lexington MA: Chief Operating Officer**

**2004-2005**

Built an HR outsourcing firm. Built a team to take over the HR functions of a \$6 billion global chemical division of British Petroleum. This involved a \$10 million system implementation, rebuilding the HR staff of 26 sites in Europe and North America. As COO, I built and managed the team, including European professionals. The division was sold before transition began.

### **UBQC, Inc., Lexington MA: CEO**

**2002-2004**

Together with a Boston University professor, wrote a patent for a unique method of storing data safely across many different computers. Obtained initial venture capital funding and developed alpha product.

### **3i Venture Partners, Waltham MA: Vice President**

**1999-2002**

3i is a \$10 billion global venture capital and private equity firm. I invested \$20 million in information technology companies including deNovis, which developed healthcare software; OpenAir, which runs a web-based service to consulting firms; and Quantiva, which runs a service to improve management of the Internet infrastructure. I joined the boards of these firms and assisted management to build the companies successfully.

### **Granitar Systems, Framingham MA: Client Partner**

**1998-1999**

Led projects that developed web-based systems. Led a team of 100 to develop law.com, a large destination site providing bookstore, information, on-line training and state-based information for lawyers throughout the U.S. Also led development of the customer service site for Datek Online.

### **Gemini Consulting, Cambridge MA: Director**

**1994-1998**

Led large-scale, multi-year projects to improve business performance. Clients included Kmart, St Vincent Hospitals, Lexis/Nexis, Mobil Oil, and Standard and Poors. Led a team of 25 to reduce cost at Kmart by \$80 million annually. Worked with medical professionals to reduce cost of service for the St Vincent hospital in Indianapolis. Reorganized the Information Technology department of Mobil in response to major outsourcing. Developed a new editing process for Lexis/Nexis.

### **KPMG, Burlington MA: Senior Manager in the Audit and Consulting Practices**

**1987-1994**

Led consulting projects in systems, systems strategy, manufacturing and retail.

### **Practice Management Systems, Wellesley MA: Chief Financial Officer**

**1984-1987**

Built a software company providing systems to help doctors bill clients and insurance companies. The company grew to \$15 million before successfully selling during industry consolidation.

**Bain & Company, Boston MA: Consultant** **1981-1984**

Participated in large-scale projects with pre-eminent strategy consulting firm. Developed strategy for Dun and Bradstreet, built a new services product for Baxter Travenol, assisted Boston Edison with mergers and acquisitions.

**Leonard Lane Associates, Anchorage AK: Consultant** **1979-1980**

Assisted private and government clients in developing business strategy.

**Deloitte, Anchorage AK: Senior Auditor** **1977-1979**

Audited clients including oil & gas, retail, government and utilities.

**Alyeska Pipeline Service Company, Fairbanks AK: Assistant Controller** **1976**

Managed accounting and payroll for one-fifth of the \$9 billion trans-Alaska pipeline construction project.

**Academic Studies**

**Doctor of Management, Weatherhead School of Management,  
Case Western Reserve University, Cleveland, OH** **2010**

DM is a selective program that integrates concept and practice. Mr. Oliver researched the management challenges faced by microfinance organizations. In particular, Mr. Oliver conducted qualitative research into the forms and mechanisms of collaboration between experienced Western business practitioners in support of local microfinance organizations in developing countries. The research also included quantitative research that contributed significantly to the literature in how to measure organizational effectiveness toward non-financial missions. This research resulted in a series of papers presented at five scholarly conferences. It has now been accepted for review at an A journal.

**Masters in Management, MIT's Sloan School of Management, Cambridge MA** **1981**

Academic concentrations in Finance, Information Technology and Strategy. Masters Thesis "*Critical Success Factors as an Approach to Defining Business Strategy*", proctored by well-known strategy author, Arnaldo Hax and the head of MIT's Center for Information Systems Research, John F. Rockart.

**Bachelors in Business Administration (Accounting), University of Alaska, Fairbanks AK** **1976**

**Academic and Professional Presentations, Articles and Honors**

2020 – How Christian Business Leaders Optimize a Quadruple Bottom Line, *Christian Business Review*, forthcoming

2019 – Why Business Needs Christian Leaders, *The Christian Post*, January 20, 2020

2018 – MassHealth Protecting Medicaid Resources for the Most Vulnerable How Massachusetts Saved Hundreds of Millions through Enhanced Eligibility Verification, *Pioneer Institute, White Paper #187*, October 2018

2017 – How CIOs can better manage change in a merger, *Health Data Management*, July 24, 2017

2016 – Why healthcare quality metrics miss the mark for consumers, *Health Data Management*, October 5, 2016

2013 – Healthcare Innovation Management in a New Era: A Conceptual Design" *Proceedings of the Academy of Management*, 2013

2011 – "Hope as a Mediator Sustaining the Impact of Microcredit" *Proceedings of the Academy of Management*

2010 – "Impact of Microfinance on Socioeconomic Status of the Poor: The Case of Malawi" Accepted for review by *World Development*

2010 – "Improving the Effectiveness of Microfinance in Reducing Household Poverty" Research paper submitted in partial completion of the requirements for the EDM program of Case Western Reserve University

- 2010 – “Impact of Microfinance on Socioeconomic Status of the Poor: The Case Of Malawi” Research paper submitted in partial completion of the requirements for the EDM program of Case Western Reserve University
- 2010 – Academy of Management Annual Meeting, “Impact of Microfinance on Socioeconomic Status of the Poor: The Case of Malawi”
- 2009 – “Impact of Microfinance on Socioeconomic Status of the Poor: Case Study of Malawi” presented to ARNOVA Annual Conference
- 2009 – Academy of Management Annual Meeting, “Collaborating to Improve Entrepreneurial Capabilities in Developing Countries.” Invited to present this paper in AOM’s exclusive new interactive format.
- 2009 – Mandel Center, Invitational Conference, “Factors Influencing Collaboration of Western Business Practitioners and NGOs Who Assist Small To Medium Sized Enterprises In Developing Countries: A Qualitative Analysis.”
- 2009 – “Factors Influencing Collaboration of Western Business Practitioners and NGOs Who Assist Small To Medium Sized Enterprises In Developing Countries: A Qualitative Analysis.” Research paper submitted in partial completion of the requirements for the EDM program of Case Western Reserve University
- 2008 – Partners Worldwide Global Bi-Annual Conference, plenary speaker, “Engaging Business and Mission: Lessons and Insights.”
- 2008 – “Factors Influencing the Effectiveness of Collaboration on Assisting an SME in a Developing Country.” Conceptual paper submitted in partial completion of the requirements for the EDM program of Case Western Reserve University. Awarded ARNOVA scholarship.
- 2008 – Awarded the Mandel Fellows Scholarship for Non Profit Studies, Case Western University
- 2007 – “Finding Hachim: A Framework for Building Social and Economic Justice in a Globalizing World, through Profitable Enterprises.” ARNOVA Annual Conference. Was awarded a merit scholarship based on this presentation.

### **Professional and Associations**

- Board of Directors, New England Healing Sports Association, L’Arche Boston North
- Chair of the Boston Chapter of Financial Executives Networking Association (FENG)
- Financial Executives International, Boston: Past board member and Chair of Continuing Professional Education
- Past member of the Academy of Management, served on one of the boards
- Past member of ARNOVA
- Certified as a CPA in Alaska and Massachusetts (inactive)