

MICHAEL BERTHELSEN, M.A.

SUMMARY

As a senior executive for the University of Minnesota, Michael leads the University Services divisions. His business approach includes focusing on strategy, improving customer service and accountability, reducing the cost of operations, building a respectful work environment and improving measurement systems to document success. Berthelsen has a documented record of being an agent of continuous improvement in both business process and organizational culture.

Michael's 28 years of experience show a clear path toward accepting increasingly complex management positions and senior leadership roles. Areas of expertise include strategic planning; operational leadership and execution; change management; working with boards and academic leadership; collaboration with faculty, staff, and students; human resources including unions; financial oversight; and communications. Additionally, Michael brings experience working with neighborhoods and both city and state governments. He is known to be a relation-based, innovative problem solver and change agent who aligns financial resources, information tools, human capital and operational practices with organizational goals and mission.

WORK HISTORY

U of MN

Interim VP University Services

8/16 to Present

Scope:

- Manages 3,500 employees (2,222 FTE)
- Operating Budget of \$416 million annually
- Capital project portfolio of over \$1 Billion in active projects
- Responsibilities for 29 million square feet Systemwide
- Reports to Senior Vice President for Finance and Operations

Responsibilities:

- Provide the University with Safe, Welcoming and Reliable spaces and services.
- Leading the University Services organizations in delivering their work effectively and efficiently: Auxiliaries Service, Public Safety, University Health and Safety, Capital Planning and Project Management, Facilities Management and set of management services (including: HR, Finance, IT and communications) that support the entire group.
- Supporting the Board of Regents with information, analysis and recommendations regarding campus operations and physical assets and staffing the Board's Committee for Facilities, Planning and Operations (through June 2017).
- Engaging with faculty, Deans, leadership and students: to provide campus and support services needed to achieve the University's academic, research and outreach mission.
- Developing and leading the University physical asset strategy.

- Advancing the University's interests by working with neighborhoods, local governments and the legislature.

Select Accomplishments (both personal and of the organization):

- Leading University Strategies regarding its **Physical Assets** by:
 - Developing a Twin Cities Campus Master Facility Plan (Building by Building plan): Generating a broad vision for the future of each facility based on objective and subjective review of each building – in order to best manage academic and operational planning of campus.
 - Initiating a St. Paul Campus Master Plan including broad participation of academic leaders.
 - Creating AHC Facility and Space committee to create and advance planning to support Health Sciences needs, including creating the Health Science Education Center and enabling the future demolition of Mayo, VFW, and Masonic.
- Advancing **University mission** by working with University leaders and the Board of Regents:
 - Completing process for Regent approval of Pioneer Hall.
 - Advancing an RFP for the first sale of land for residential use, developing and presenting status report to Board, continuing environmental remediation work (clean up, planning and negotiations).
- Improving the **Culture of Accountability** within University Services by completing its strategic plan and developing a tracking and management tool for major initiatives.
- Addressing the needs and concerns of **Students** by:
 - Working with student leadership regarding food quality and options by creating a shared work-plan and re-starting a Student Food Advisory Committee.
 - Continuing to develop the Housing Strategy – adding evaluation of off-campus student housing locations and types using GIS tools.
 - Charging a team (with Student Affairs) to look at ways to improve support of off-campus student living (vast majority of students).
- Focusing on **Safety** of University community by:
 - Initiating study and pilot program to evaluate body cameras for UMPD.
 - Developing a comprehensive Chemical Inventory program for all labs.
- Nurturing an **Enterprise focus** within University Services by:
 - Advancing the University's first enterprise scope software system for managing the University's physical assets (\$14M overall program budget), including selection of software, consultants and gaining Regent approval. Scope includes: space, real estate, capital planning and project management, maintenance, etc.
 - Serving on the Search Committee for the Crookston Chancellor.
 - Seeking input and perspective from each of the system campuses.
- Driving University commitment to **Sustainability** by dramatically reducing the University's greenhouse gas emissions and controlling energy costs by reducing the U's reliance on the utility (Xcel), moving from 93% of electricity consumed on-campus provided by Xcel in 2013 to an anticipated 36% in 2018, supplanting utility provided electricity with 20% solar power (through community solar gardens, Xcel's Renewable program and solar capacity on campus) and 44% on-campus production through the operation of the new Combined Heat and Power plant and the SE plant.
- Creating a **Welcoming and Respectful** campus environment where all are welcome by signing hundreds of single user bathrooms as gender-neutral bathrooms and establishing a plan for foot-washing stations on campus.
- Cultivating **University relationships** with neighborhoods, city and State governments by:
 - Supporting 2017 Capital Request at the Legislature through presentations and individual meetings with Legislators.
 - Meeting routinely with Commissioner for MN Pollution Control Agency to create a shared and collaborative agenda.
 - Becoming member of and Interim Vice Chair for University District Alliance, and member of its Executive Team and a member of the new Towerside Board.

- Establishing new dialogue and joint planning effort with UM Foundation Real Estate Advisors.

Assoc. VP Facilities Management

12/06 to 8/16

Interim Assoc. VP Facilities Management

6/06 to 12/06

Scope:

- Oversees 23 million square feet on Twin Cities campus
- Manages 1,100 employees represented by 22 unions
- Budget of \$212 million annually
- Reports to Vice President for University Services

Responsibilities:

- Developing and leading the physical asset strategy and business plan for Twin Cities Campus.
- Providing a full range of facility and utility services to the Twin Cities campus, including: custodial, maintenance, small construction, landcare, recycling and waste, utility production and distribution, and facility engineering services.

Select Accomplishments (both personal and of the organization):

Strategic and Executive Leadership

- Leading the development of a strategic plan based on a Balanced Scorecard Strategy Map format – that cascades to individual performance management plans.
- Presenting regularly to the University Board of Regents and faculty and externally to the Legislature, stakeholders and professional organizations.
- Creating a comprehensive process improvement process to invite ideas from across the organization, prioritize initiatives, and manage their implementation through systematic oversight and accountability.
- Recognized as Facility Executive magazine's 2015 Facility Executive of the year.

Financial

- Reducing costs and re-engineered operations to address a structural budget problem and two significant budget reductions – a total of \$18 million in reduced annual expenses.
- Lowering Facilities Management's operating cost per square foot significantly (\$1.50 over peers in 2002 to \$0.50 less than peers by 2011).

Human Capital

- Leading the transformation of Facilities Management into a Property Services organization – including a new organizational structure with new job descriptions and a process for all operations supervisors to re-apply for new roles.
- Driving accountability by implementing a performance based evaluation system, a merit pay program and operational metrics that are published monthly for the University and reviewed by the FM Leadership Team.
- Providing leadership development through 360 reviews and training for delivering quality feedback and leading a diverse workforce.
- Co-chairing the University Labor-Management Committee with Twin Cities Trade Council.
- Creating an internal communication and engagement program including: labor relations; weekly email to all staff; highlighting 'Great Performances'; and in-person meetings with all staff; touring with custodians; and 'Breakfasts with Berthelsen' with front-line staff).

Information Tools

- Creating a vision and generating buy-in for a new Enterprise Asset Management program - a business practice and enterprise IT solution that integrates strategic planning with operations, maintenance and capital investment decision-making to increase efficiencies of all assets – plant, inventory, and people.

- Directing the RFP for seeking this comprehensive software tool (IWMS – Integrated Workplace Management System) to replace our current outdated CMMS system.

Operations and Project Management

- Focusing on Customer Service by creating customer advisory groups, Service Level Agreements with each College, and conducting annual customer satisfaction surveys.
- Advancing a campus Utility Master Plan, including advancing a \$113 million Combined Heat and Power plant to produce both steam and electricity to campus: increasing reliability, reducing the campus carbon footprint (10-15%) and reducing operating cost (est. \$160 million over 30 years).
- Leading the renewal strategy and efforts for the campus. This has included creating and maintaining a comprehensive Facility Condition Assessment of campus and a Strategic Facility Plan for every building.
- Directing the capital renewal investment plan and participating in the long-term capital planning for the University system-wide.

Sustainability and Energy Conservation

- Developing and implementing sustainability program for Twin Cities Campus
 - Co-Chair Campus Sustainability Committee that developed the campus's first Climate Action Plan to reduce its carbon footprint by half in 10 years.
 - Reducing energy usage with a program called "It All Adds Up" (<http://www1.umn.edu/italladdsup/>) which has reduced energy consumption adding up to more than \$8 million dollars in energy saving and a reduction of 70,000 tons of CO₂ annually (from 2008 baseline).

Asst. VP and CFO for University Services

3/03 to 6/06

Scope:

Financial management responsibilities for: Facilities Management, Capital Planning/Project Management, Public Safety, Environmental Health and Safety and Auxiliary Services which includes parking, residential life, food service, bookstores and other auxiliary businesses. Reported directly to the VP for University Services.

Annual All-Funds Operating Budget:	\$325 million
Average Capital Budget:	\$220 million

Responsibilities:

- Preparing and administering the operating and capital budgets for University Services.
- Coordinating the University's Capital Project Executive Committee.

Select Accomplishments (both personal and of the organization):

- Leading the development of the cost allocation model for Utilities and Facilities to clarify full cost of operations and establish desired incentives for operational behavior.
- Developing a new University Services Finance Department.
- Establishing a new cross-functional team to manage the forward purchasing of fuels.
- Directing a budget process to manage a 15% reduction over 2 years.
- Serving on the University-wide steering committee for a new enterprise financial system.
- Leading a University cross-functional team for the 'U-Card' programs and leases for ATMs on campus, generating a projected \$20M to the University over 10 years.

Budget & Finance Officer

9/93 to 3/03

Scope:

Reported directly to Chief Financial Officer and Treasurer for the University of Minnesota:

Annual All-Funds Operating Budget:	More than \$2 billion
Average Capital Budget Authorization:	\$220 million

Responsibilities:

Identifying and analyzing programmatic and budgetary issues as the lead staff person for the Academic Health Center, System-wide Campuses and University Services. Serving on the University Debt Oversight Group.

Select Accomplishments (both personal and of the organization):

- Creating and managing a cross-functional senior management team that oversaw projects totaling \$1.3 billion.
- Redesigning University operating and capital budget development processes.
- Creating and presenting operational and policy recommendations and presentations to senior management, faculty governance, Board of Regents and the MN Legislature.
- Developing legislative strategy for: University capital plans, Fairview-University Hospital affiliation and Academic Health Center legislative requests.
 - Participating on Financial Impact Team for the University as it prepared for the sale of University Hospital to Fairview Health Systems. Led the financial analysis of a scenario to close the hospital.

Minnesota House of Representatives

Fiscal Analyst, Health & Human Services Finance Committee

11/89 to 9/93

Assistant to Chief Fiscal Analyst

1/93 to 9/93

Responsibilities:

Analyzing fiscal and policy issues for the House of Representatives with oversight of the budgets and programs for the Departments of: Health, Corrections, Jobs & Training, Housing, Human Rights, and Veterans' Nursing Homes. Assisting Representatives in developing budget and program proposals. Assisting Chief Fiscal Analyst during the 1993 session, participating in overall budget strategy, development, and oversight.

Select Accomplishments (both personal and of the organization):

- Writing analyses of the budget, correctional policy and health care reform.
- Assisting in the development of MinnesotaCare (State initiative to expand health care access, reform health care systems and control health care cost in Minnesota.)
- Developing operating and capital budgets with Appropriations Committee.
- Creating and generating support for a performance reporting system for state agencies (enacted as law, 1993).

City of Minneapolis Budget Office

Budget Analyst Intern

4/89 to 11/89

Responsibilities included: Budget review, development and program recommendations.

Peoples Community Health Center, Baltimore MD

Outreach Worker

9/86 to 8/87

Responsibilities included: Administrative support to the director for this health center addressing the needs of low-income clients through the Lutheran Volunteer Corps program (similar to VISTA – living in an intentional community of volunteers).

EDUCATION

Executive Course on Strategy Mapping and a Balanced Scorecard through the Harvard Business School Executive Education Program - 2005

M.A. Public Affairs, Humphrey Institute, University of Minnesota, 1992

*Thesis "An Outcomes Approach for Managing State Government in Minnesota"

B.A. Philosophy and Political Science/History, Concordia College, Moorhead MN, 1986

UNIVERSITY SERVICE / SELECT COMMITTEES

- Convening and leading the workplan for several System-wide committees including:
 - Capital Strategy Group
 - Capital Oversight Group
 - Emergency Management Policy Committee
- Serving on the President's Senior Leadership Team and several University-wide committees including:
 - Senate Committee for Finance and Planning
 - President's Policy Committee

COMMUNITY SERVICE

Northfield Public Schools:

- School Board Member (2004-2010): Helped move District from Statutory Deficit to surplus and an AA+ bond rating.
- Northfield Schools Finance Advisory Committee (2002-2004, 2010-2012)

Green Lake Lutheran Ministries:

- Board Executive Comm. Member (2004-2015),
- Board Chair – (2014), Leading Strategic Planning effort
- Chair, Executive Director Search

St. John's Lutheran Church - Northfield:

- Chair, Strategic Planning Committee (2010), Sr. Pastor Call Committee (2012),

Northfield Steering Committee for the Development of a Business Park (2010)

Other Community Involvement: Boy Scout Volunteer, Habitat for Humanity Family Selection Committee, Mentor at St. Joseph's Home for Children, St. Stephens Homeless Shelter, First Call for Help (Baltimore)