

Business Address

UCI Extension Dean's Office
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Gary W. Matkin

Education

University of California, Berkeley, Ph.D., May 1989, School of Education, Division of Higher Education. Dissertation: Technology Transfer and the American Research University

University of California, Berkeley, MBA, December 1970. Major: Accounting, Political and Social Aspects of Business

University of San Francisco, BS (Accounting), June 1966. Major: Accounting Specialist. Activities: Member and president, Beta Gamma Sigma; Member, Alpha Sigma Nu Honor Society. Highest academically, School of Business Administration

Professional Designation

Certified Public Accountant, (inactive) License E14426

Work Experience

March 1, 2000 – Present

Dean, Continuing Education, Distance Learning, and Summer Session

University of California, Irvine

Responsible for all aspects of the academic programs and operations of University Extension, Summer Session and the UCI Distance Learning Center. University Extension offers over 2,400 courses per year to about 35,000 students annually. Summer Session offers over 800 courses to 12,000 students each summer, including 32 online undergraduate courses that have served over 2,000 students over the last three years. The combined budgets of the three units exceed \$58 million annually. The UCI Distance Learning Center creates and delivers online courses to distance students. Its activity generates over \$5 million per year and it delivers over 130 courses per term.

October 1997 – March 1, 2000

Associate Dean, Academic Affairs and Technology Initiatives, University Extension, University of California, Berkeley.

Responsible for academic matters for U.C. Berkeley Extension, including academic review, program quality, policy formulation and interpretation, relations with the UC Berkeley Academic Senate, academic personnel administration, student and instructor issues. Responsible for strategic planning and implementation of Extension's new instructional technology initiatives, including online instruction and the Center for Media and Independent Learning (CMIL). Evaluated new projects and served as overall project manager for major development projects. Coordinated Extension's nationwide marketing

efforts. Served as senior advisor to Dean, Assistant Deans and other managers. Served as Acting Dean in the absence of the Dean.

April 1990 - October 1997

Associate Dean, University Extension, University of California, Berkeley.

Responsible for all academic matters for U.C. Berkeley Extension, including program quality, policy formulation and implementation, academic personnel administration, and program planning. Supervised the managers of six academic departments and the marketing department, composed of 30 academic and 147 clerical staff members. Program grew from about 2200 courses with revenue of \$17 million in 1990, to 2800 courses with revenue of \$42 million in 1997. Responsible for maintaining positive relations with university faculty, campus units, and community organizations. Served as Acting Dean in the absence of the Dean.

January 1, 1988 - April 1990

Executive Assistant to the Dean, University Extension, University of California, Berkeley.

Performed a wide variety of administrative tasks, advised Dean of Extension on new program areas, supervised the Manager of Personnel for University Extension and was responsible for personnel operations, served as Chair of the Administrative and Liaison Committee of University Extension, represented University Extension at University and community functions, maintained relations with campus and community groups, and dealt with student complaints and faculty concerns.

May 1975 - December 31, 1987

Director, Administrative Services, University Extension, University of California, Berkeley.

Chief fiscal officer of a self-supporting instructional unit of the university with an annual budget of over \$16 million. Responsible for budget, planning, and fiscal monitoring and control of 20 separate organizational units, as well as the administration of approximately 30 contracts and grants. Responsible for the management of four administrative departments with a total of 60 employees. Negotiated contracts with governmental and private agencies, coordinated space planning, and negotiated leases for off-campus space.

Reviewed and revised management information systems and procedures. Reported directly to the Dean of University Extension.

July 1973 - May 1975

Business Officer, University Extension, University of California, Berkeley.

Supervised Business Office staff in day-to-day business affairs, administered contracts and grants, prepared annual budget, performed accounting analysis and prepared financial reports as required.

January 1972 - July 1973

Senior Analyst, Kaiser Broadcasting Corporation, Oakland, California.

Prepared month-end financial statements on consolidated basis, prepared cash flow forecasts of operating results, analyzed station financial results.

August 1971 - January 1972

Analyst, Kaiser Industries Corporation, Oakland, California.

Prepared month-end financial statements on consolidated basis. Performed accounting analysis as required including reports to the SEC.

September 1970 - November 1971

Controller, small research company, Berkeley, California.

Established accounting system and procedures including job cost system, assisted in starting business, administered contracts and grants.

May 1968 - April 1969

Semi-senior to senior staff accountant, audit department, John F. Forbes & Co., CPA, San Francisco, California.

October 1966 - May 1968

Junior to semi-senior staff accountant, audit and tax departments, Touche, Ross & Co., CPA, San Francisco, California.

University Teaching Experience

Spring 2003

Adjunct lecturer, University of California, Irvine

Taught a graduate seminar, Educ. 250c, History of Innovation and School Reform (Higher Education).

Fall 1982 - Summer 1985 (5 Quarters)

Instructor, Hayward State University

Taught introductory accounting and managerial accounting courses for undergraduate students.

Spring 1974 - Summer 1976 (7 Semesters)

Instructor, University Extension.

Taught introductory accounting courses to Extension students.

Spring 1975

Instructor, Boalt School of Law

Substituted for accounting instructor for one semester.

April 1969 - September 1970

Research and teaching assistant, School of Business Administration, University of California at Berkeley. Accounting and auditing courses.

Other University Affiliations

Research Associate, Center for Studies in Higher Education, University of California, Berkeley, 1978-present.

Research Associate, Institute of Urban and Regional Development, University of California, Berkeley, 1989-2000.

Member, Advisory Board, Center for German and European Studies, University of California, Berkeley, 1990-2000.

Honors and Awards

OC Metro 2010 Hot 25, Honoree, 2010.

Julius M. Nolte Award for Extraordinary Leadership Recipient, from the University Continuing Education Association (UCEA), 2010.

Excellence in Achievement Award Recipient, from California Alumni Association at the University of California, Berkeley, 2010.

Publications

Books:

Using Financial Information in Continuing Education, Accepted Methods and New Approaches, Phoenix, Arizona: 1997 American Council on Education/Oryx Press, (309 pages). Awarded the Philip E. Frandson Award by the University Continuing Education Association, April 1997. Available for download at <http://books.google.com/books?id=oJlw-u9iAS4C&lpg=PP1&pg=PP1#v=onepage&q&f=false>

Technology Transfer and the University, New York: 1990. Macmillan, (329 pages).

Effective Budgeting in Continuing Education, San Francisco: 1985 Jossey-Bass Publishers, (476 pages). Honorable mention, Philip Frandson Award, NUCEA, 1987.

Book Chapters:

“Adult Degree Programs: How Money Talks and What It Tells, Developing and Delivering Adult Degree Programs,” edited by James P. Pappas and Jerry Jerman, San Francisco: 2004, Jossey-Bass (61-71).

“Institutional Changes for Transdisciplinary Research and Learning” The Encyclopedia of Life Support Systems, item E6-49-03. EOLSS Publishers Co., Inc., Oxford, U.K.

“University Technology Transfer and the Problems of Conflict of Interest” Technology Transfer and Public Policy, edited by Yong S. Lee (95-109), Westport, Connecticut: 1997, Quorum Books.

“Organizing University Economic Development: Lessons from Continuing Education and Technology Transfer,” The University’s Role in Economic

Development: From Research to Outreach, edited by James P. Pappas, San Francisco: 1997, Jossey-Bass (27-41).

"The University Role in Regional Economic Development: Lessons for Switzerland from America," Wandel im Tertiären Bildungssektor (71-79), Herbst, Latzel and Lutz (Ed.), Hochschul-Verlag AG, Zurich, 1997.

Journal Articles:

"Meeting the Challenge of Free Education - How To Make Money When the Competition is Giving it Away," Continuing Higher Education Review. Vol. 75, 2011, 130-137.

"The Distance Educator's Opportunity for Institutional Leadership," Continuing Higher Education Review. Vol. 74, 2010, 32-29.

"Increasing UCEA's Usefulness and Relevance: A Choice-Based Classification System," Continuing Higher Education Review. Vol. 73, 2009, 175-183.

"Institutional Sharing of OpenCourseWare Across National Boundaries: A Case Study and Historical First in Higher Education," UCEA Connect, September 3, 2009.

"Ethical Realism: A Guide to Action?" Continuing Higher Education Review. Vol. 72, 2008, 151-153.

"Spinning Off in the United States: Why and How?" STI Review, Special Issue on Fostering High-tech Spin-offs: A Public Strategy for Innovation, Organization for Economic Cooperation and Development (OECD), No. 26, 2001, 97-119.

"Notes on Financing University Distance Education," Continuing Higher Education Review, Vol. 65, 2001, 89-97.

"Redefining Competition in University Continuing Education," Continuing Higher Education Review, Vol. 62, 1998, 71-74.

"Taking Stock of Taking Equity: The Last Frontier of University Technology Transfer," Tertiary Education and Management, 2:1, 1996, 31-40.

"From Cash Cow to Golden Goose: Measuring and Reporting the Economic Impact of Continuing Education's Continuing Higher Education Review," Spring 1995, Vol. 58, No 3, 27-41.

"Technology Transfer and Public Policy: Lessons from a Case Study," Policy Studies Journal, Summer 1994, Vol. 22, No. 2, 371-383. (Version of chapter in Technology and Transfer and Public Policy mentioned above.)

“Portfolio Management in Program Planning,” Continuing Higher Education Review, Autumn 1988, Vol. 52, No. 3, 123-132.

“Managing Continuing Education: A Briefing for University Administrators,” Journal for Higher Education Management, Winter/Spring 1987, Vol. 2, No. 2, 43-51.

“Living and Learning with Inflation: How to be a Winner,” Continuum, Journal of the National University Continuing Education Association, April 1981, Vol. XLV, No. 3.

Other Publications:

“Beyond Sustainability: The Emerging Institutional Imperative of OER/OCW,” FGV Online Magazine, Issue #1, January 2011, 8-23.

“Join Movement to Share Courses, Materials Online,” Dean and Provost. Vol. 11, Issue 4, December 2009, 3.

“Institutional Sharing of OpenCourseWare Across National Boundaries: A Case Study and Historical First in Higher Education,” Distance Education Report, Vol. 13, Number 10, May 2009, 3&7-8.

“Mass Education to Universal Education: Where Does Online Learning Fit?,” Distance Education Report, Vol. 13, Number 5, March 2009, 3 & 6.

“Open Learning: What Do Open Textbooks Tell Us About the Revolution in Education?” University of California Berkeley Center for Studies in Higher Education: Research & Occasional Papers Series CSHE.1.2009 (March 2009).

“The Second Revolution in Education is Here: Consequences and Implications for Educators,” Distance Education Report, Vol. 13, Number 4, February 2009, 3 & 7.

“Spas Must Work with Educators to Make Spa Management a Real Profession,” Spa Business, Vol. 2, 2008, 9.

“Opening the Gate on Learning Pathways: The Next Frontier in the Open Educational Resources Movement,” Proceedings of the Open Educational Conference, 2008. Dalian, China. April 24-26, 2008. Dalian University of Technology. Available at:

http://unex.uci.edu/pdfs/dean/matkin_learningpathways.pdf

“Open Learning: What Do Open Textbooks Tell Us About the Revolution in Education?” Threshold Magazine, Spring 2008, 8-11.

“Use of the Internet and Higher Education: Likely Future Trends,” CSHE@50: A Reflection and Prospectus on Globalization and Higher Education. December 2007. Edited by C. Judson King and John Aubrey Douglass. 22.

“Open Textbooks: Why? What? How? When?” William and Flora Hewlett Foundation, co-authored with Jia Frydenberg, October 2007.

“Internet as Teenager in Higher Education: Rapid Growth, Transformation, Uncertain But Bright Future,” University of California Berkeley Center for Studies in Higher Education: Research & Occasional Papers Series CSHE.X.07, June 2007.

“The Open Education Resources Movement: Current Status and Prospects,” Association of Pacific Rim University, conference proceedings, Fall, 2006.

“The Department Encounters Open Educational Resources” The Department Chair, Winter, 2006, 16-18.

“Viewpoint: Open Courseware is Here. Where are You?” University Business, August, 2005, 29-30.

“Developing a Conceptual Framework and Vocabulary for E-Learning,” University Teaching As E-Business? Research and Policy Agendas, Selected Conference Proceedings, Center for Studies in Higher Education, edited by Diane Harley, Shannon Lawrence, Sandra Ouyang, and Jenny White, 2002, 5-12.

“A Dean’s Perspective of Online Education at UC,” University of California, Teaching Learning and Technology Center, June 2002, website: <http://www.ucltcl.org/news/2002/06/matkin.html>.

“Report on a Preliminary Survey of Economic Development Efforts of NASULGC Member Institutions,” December 1996.

“The University Role in Regional Economic Development: Lessons for Switzerland from America” (See citation under “Book Chapters” above) and “Taking Stock of Taking Equity: The Last Frontier of University Technology Transfer,” Wandel im Tertiären Bildungssektor: Zur Position der Schweiz im Internationalen Vergleich, Proceedings from the EAIR Forum, August, 1995.

“Colleges as Promoters of Economic Development,” opinion piece, Chronicle of Higher Education, 17 November, 1993, B1.

Book Review in Continuing Higher Education Review, 57, 1 and 2, 1993: “Students of the Third Age: University/College Programs for Retired Adults.”

Book Review in Planning for Higher Education, Summer 1992: “Technology in the Garden: Research Parks and Regional Economic Development.”

“Course Budgeting: Balancing Rewards and Risks,” November 6, 1985. ERIC ED 262 187.

“Theory, Method, and Appropriateness in Adult Education Research,” Proceedings of the Twenty-First Annual Adult Education Research Conference, May 1980, Vancouver, British Columbia.

“A Survey of Certain Characteristics of Enrollees in Courses Offered by University Extension, University of California, Berkeley, in the Fall, 1976 Term,” ERIC ED 192 512.

Contracts and Awards

Boeing Foundation. Support for online and open resource courses for K-12 science teachers. January 2010 – September 2011. \$50,000.

William and Flora Hewlett Foundation. Support for Open Educational Resources Projects. July 20, 2009 – December 31, 2011. \$320,000.

Certified Financial Planner Board of Standards, Inc. Support for translation of open course *Fundamentals of Financial Planning* into Spanish. January 1, 2009-June 30, 2009. \$17,890.

William and Flora Hewlett Foundation. Support for online and open resource courses for K-12 science and mathematics teachers, July 1, 2005-June 30, 2009. \$370,000.

Boeing Foundation. Support for online and open resource courses for K-12 science teachers. July, 2005-June 2009. \$200,000.

Bernard Osher Foundation. Support for UCI Osher Lifelong Learning Institute. Gift, \$1 million, May 2006. Grants, July 1, 2003-July 15, 2005. \$300,000. Support for second annual Osher Lifelong Learning Institute meeting, November 5-7, 2004. \$150,000.

William and Flora Hewlett Foundation. Support for the Foundation’s Open Knowledge Initiative; April 15, 2004-April 14, 2007. \$220,000

William and Flora Hewlett Foundation. Seminar on the State of Learning Content Sharing in the E-Learning Industry. July 1, 2002 – June 30, 2003. \$87,000.

University Service

Member, UC Office of the President Administrative-Senate Committee of the Academic Planning Council, Advisory Committee for Online Instruction Pilot, December 2009 – present.

Instructor, UCI Leadership Academy, 2007-2009.

Chair, UCI Great Park Planning Work Group, July 2006-present.

Member, Board of Directors, University Club, UCI August 2000-Present, First Vice President, June 2002-November 2004, President-November 2004-present.

Member, UCI Enrollment Council, September 2003-present.

Member (staff) Technology Transfer Advisory Committee, November 1991-present.

Campus Representative - Association of Public and Land-grant Universities, Council on Outreach & Technology Transfer, 1993-present.

Member, Instructional Technology Work Group, UC Office of the President, April 2006-January, 2008.

Chair, University Extension Council (of Extension Deans), March 2002-June 2006.

Member, Standing Committee on Copyright, March 1, 2000-June 2006.

Member, University Research Park Advisory Committee, UC Irvine, July 2000-August 2002.

Designated Member, California Alumni Association Board of Directors, 1987-2000.

Adviser, Technology Transfer Office, Office of the President, 1989-1993.

Member, Task Force on California Technologies Venture Capital Project, 1991-1993.

Adviser, President's Committee on Technology Transfer to Small and Medium-Sized Business Enterprises, 1989-90.

Member, Berkeley Campus Recharge Committee, 1978-1990.

Community Service

Member, Orange County Workforce Investment Board, July 2000-present.

Member, Advisory Committee, Oakland Community Networking Project, October 1997-March 2000.

Member, Education and Training Subcommittee, Dellums Defense Conversion Committee, 1995-1997.

Professional Service

Member, Western Association of Schools and Colleges (WASC) accreditation visit team, CSU Stanislaus, August 2008-November 2008.

Member, Western Association of Schools and Colleges (WASC) Substantive Change Sub-Committee, April 2005-April 2008.

Treasurer, OpenCourseWare Consortium, April 2008-present.

Member, Certified Financial Planners Education Task Force (national), February, 2006-November 2007.

Member, UC Taskforce on Science and Mathematics Initiative, March 2005-June 2006

Convenor, Alliance of Four Universities for Online Education May 2000 – June 2004.

University Continuing Education Association (UCEA):

Chair, Professional Development Committee April 2003-April 2005.

Member, Board of Directors, April 1998-April 2004.

Chair, Transcommission Core Curriculum Development Committee, May 1998-April 2003.

Member, National Conference Planning Committee (2002).

Vice Chair, Commission on Management and Leadership, April 1998-September, 1999.

Member, Continuing Higher Education Review Editorial Board, 1991-2008 (Chair, April 1993-October 1997).

Member, Advisory Committee on the Organizational Issues Publication Series, May 1992-September 1995.

Member, Awards Committee, Division of Research, 1998-2002.

Chair, Curriculum Advisory Task Force for new continuing education deans and directors, November 1990-July 1991.

Chair, Task Force on Technology Transfer and the University, July 1990-April, 1991.

Member, Long Range Planning Committee, April 1987-April 1989.

Association of Public and Land-grant Universities (APLU):

Designated representative, UC Irvine, Commission on Outreach and Technology Transfer, and the Council on Extension, Continuing Education, and Public Services, 2000 – present.

Member, Board of Directors, Council in Extension, Continuing Education and Public Service, January 1, 2004-October 2007.

Designated representative, UC Berkeley, Commission on Outreach and Technology Transfer, 1991-2000.

Member, Planning Committee for the Annual Meeting of the Council on Continuing Education and Public Service, May 1990-May 1991.

Member, Executive Advisory Board, Information Technology Credentials through Electronic Pathway Partnership, funded by the Learning Anywhere, Anytime Program (LAAP) of the Fund for the Improvement of Postsecondary Education, August 2000-January 2004.

Consultant Review Assignments

University of Oklahoma, January-March 2007. Reviewed the University Outreach/College of Continuing Education financial allocation methods.

University of British Columbia, member of external review panel, College of Continuing Studies, November 2006.

Florida International University, December 2004. Reviewed current operations and alternatives for the College of Continuing and Professional Studies.

University of British Columbia, June 2004. Performed “mid-term” analysis of the Division of Continuing Studies.

Excelsior College, May 2003. Examined feasibility of the development of an online program.

Duquesne University, February 2002. Reviewed financial model for School of Leadership and Professional Advancement.

Utah State University. November 2001. Reviewed organizational structure and departmental relations of University Extension.

American Psychological Association, August 2001. Assisted in strategic planning for online education.

University of Pittsburgh, July 2001. Reviewed budget model for the College of General Studies and made recommendations for revisions.

Purdue University, April 2001. Conducted a review of current distance learning activities and made recommendations regarding adjustments to mission statement and strategic plans for online learning.

University of Oklahoma, November 2000. Conducted full day seminar on continuing education financial management and control.

University of Vermont, September 2000. Reviewed financial system and business plan of the Professional Programs unit of the Division of Continuing Education.

Eastern Washington University, May 1, 1995 –June 2001. Review prospects for expansion of continuing education, advise on establishing expanded continuing education program.

Carleton College, May 3, 1999. Advised administration about strategic planning for distance and online education.

Sierra Nevada College, July 28-29, 1998. Reviewed current continuing education program, advised on strategic directions and planning.

University of Georgia, the Georgia Center for Continuing Education, July 14-18, 1998. Reviewed operations, made recommendations on current resource allocation processes and succession planning.

St. Cloud State, Minnesota, June 1996. Reviewed current CE program and prospects; presented alternative recommendations for growth.

University of Minnesota, Continuing Education and Extension, October 1994. Provided advice on long-range planning efforts.

Rhode Island School of Design, March 1994. Reviewed program offerings, organizational structure, relations with departments, and potential growth areas.

University of Alaska, Anchorage, May 1992. Reviewed program offering, organizational structure, budget, and financial system.

Portland State University, Portland, Oregon, October 1991. Reviewed budget and financial monitoring plan.

Pennsylvania State University, University Park. March 1991. Member of 4-member team reviewing the feasibility of a proposed major new conference facility in the University's Research Park.

University of Alabama, Huntsville, December 1987. Member of 4-member team reviewing the Division of Continuing Education and its Director.

University of Wisconsin, Milwaukee, April 1987. Reviewed the operations, budget, personnel, and program of the Business and Management unit of the Division of Continuing Education.

University of Cincinnati, October 1986. Reviewed the budgeting process of the Office of Continuing Education.

San Francisco Theological Seminary. September 1981. Reviewed administrative and clerical functions of the Advanced Pastoral Studies Division.

Seminars and Paper Presentations

(For Seminars and Paper Presentations prior to December 31, 1988, see Attachment 1.)

"Making OpenCourseWare Indispensable: UC Irvine's Top 10 Reasons," presented at the OpenCourseWare Consortium Global 2011. Cambridge, Massachusetts. May 6, 2011. Download presentation at <http://www.slideshare.net/garymatkin/ocwc-global-2011>.

“Why You Should Immediately Create an OpenCourseWare Web Site at Your Institution,” presented at the University Professional and Continuing Education Association Annual Conference. Toronto, Canada. April 7, 2011. Download presentation at <http://www.slideshare.net/garymatkin/upcea2011-7500314>.

“Internationalizing Learning Contexts through Open and Distance Education Lessons from Case Studies,” presented at the Association of International Education Administrators (AIEA) Annual Conference. San Francisco, California. February 22, 2011. Download presentation at <http://www.slideshare.net/garymatkin/internationalizing-learning-conceptsaiea-2011>.

“UC Irvine Open Textbook Forum,” moderated forum on the UC Irvine Campus, Irvine, California, January 26, 2011. Download archived recording of forum at <http://cast.nacs.uci.edu/tltc/Production/UNEX/OpenTextbookForum.html>.

“Sustainability as Imperative: The Unavoidable Future for OCW,” presented at the OCWC Global 2010. Hanoi, Vietnam. May 5, 2010. Download presentation at <http://www.slideshare.net/garymatkin/sustainability-as-imperative-the-unavoidable-future-for-ocw>.

“Beyond Accreditation and Standards: The Distance Educator’s Opportunity for Leadership,” presented at the University Continuing Education Association (UCEA) 95th Annual Convention, San Francisco. April 8, 2010. Download presentation at <http://www.slideshare.net/garymatkin/beyond-accreditation-and-standards-the-distance-educators-opportunity-for-leadership>.

“Fifteen Years Later: A Look at the Promise and Prospects of Online Learning,” presented at the Center for Studies in Higher Education (CSHE), University of California, Berkeley. November 5, 2009.

“The Second Revolution in Teaching and Learning” presented to the Osher Lifelong Learning Institute (OLLI). Irvine, California. September 10, 2009.

“Branding, Quality and Openness: New Dimensions in Higher Education” presented at SEAMEO RETRAC 12th Governing Board Meeting and International Conference on Branding in Higher Education: Practices and Lessons Learned from Global Perspectives. Nha Trang, Vietnam. August 10-11, 2009.

“Institutional Benefits and Innovations From Sharing Content: From Open to Opportunity” presented at The World Conference on Higher Education: The New Dynamics of Higher Education. Paris, France. July 7, 2009.

“OpenCourseWare Is Here” presented at The 23rd ICDE World Conference on Open and Distance Learning. Maastricht, The Netherlands. June 8, 2009.

“The OCWC’s Next Frontier – Learning Ecosystems,” presented at OCWC Global conference. Monterrey, Mexico. April 23, 2009.

“Leadership in Higher Education,” presented at University Continuing Education Association Annual Conference. Boston, Massachusetts. April 1, 2009.

“Financial Information for Strategic Decision Making In Continuing Education, Module 2,” presented online for Academic Impressions. Irvine, California. March 13, 2009.

“Financial Information for Strategic Decision Making In Continuing Education, Module 1,” presented online for Academic Impressions. Irvine, California. March 9, 2009.

“OCW and Educational Commerce: Rethinking the North-South Relationship in the Americas,” presented at Connexions conference. Houston, Texas. February 5, 2009.

“Beyond Carnegie – Useful Criteria for Comparing and Classifying University Professional and Continuing Education Organizations,” presented at University Continuing Education Association Executive Assembly. Chicago, Illinois. September 11, 2008.

“OpenCourseWare,” presented at UC 21st Century Teaching Technologies: Past, Present and Future. Davis, California. June 20, 2008.

“Partnering and Collaboration in 2020,” presented at the National University Technology Network annual meeting. Park City, Utah. June 9-11, 2008.

“OpenCourseWare,” presented at the National University Technology Network annual meeting. Park City, Utah. June 9-11, 2008.

“Opening the Gate on Learning Pathways,” Presented at the Open Education Conference, 2008. Dalian, China. April 26, 2008. Dalian University of Technology.

“Learning a new Composition: Adult Learners in and Era of Open Access,” presented at the UCEA annual meeting, New Orleans, March 28, 2008.

“Visions of the New World in Continuing Education,” captured with the cooperation of the University of California, Irvine Paul Merage School of Business, February 26, 2008.

“Transformation and the Future of Internet Enriched Higher Education,” presented at the 2007 International Conference on Innovation, Design, and Entrepreneurship (IDEA 2007), Taichung, Taiwan, May 31, 2007.

“Managing Global Partnerships,” presented at the UCEA annual meeting, April 13, 2007, Vancouver, Canada.

“Use of the Internet and Higher Education: Likely Future Trends,” presented at the Center for Studies in Higher Education 50th Anniversary Seminar, Berkeley, March 28, 2007.

“Program Financial Planning for Effective Decision-Making” and “Preparing a Business Plan for a New Program.” Webcasts presented by the University Continuing Education Association, January 2007.

“Collaborating with Competitors—Real or Potential,” presented at the UCEA Executive Assembly, Chicago, September 14, 2006.

Strategies for Online Programs. Presented at the Program Directors Conference for the Certified Financial Planning Board, August 2, 2006. Santa Monica, CA.

Open Educational Resources and the Community College. Presented at the annual meeting of the American Association of Community Colleges, April 25, 2006, Long Beach, CA.

Beyond the Standards: Quality in Distance Education. Presented at the semi-annual retreat of the Western Association of Schools and Colleges (WASC), April 14, 2006, Irvine, CA.

Realizing the Potential of Strategic Partnerships: Issues and Organizational Structures. Presented at the UCEA Management Seminar, “Covering Your Bases” February 16, 2006, Sarasota, FL

Open Content is Here. Presented at the UCEA National Meeting, April 1, 2005, Boston, MA.

Connecting Regional Economic Development Efforts with the Global Marketplace. Presented at the National Association of State Universities and Land Grant Colleges annual meeting, November 15, 2004, San Diego, CA

Developing the Economical Management Practices that Anticipate the Unexpected. Presented at the UCEA Summer Institute for Continuing Education Professionals, Boston, July, 2004.

LMS Use and Issues. Presented at the conference, OECD/CERI E-learning Case Studies in Post-secondary Education, March 30, 2004. Paris, France.

Expectations, Experiences and Reality: International Views on E-Learning. Presented at Campus Innovation Hamburg, Germany, October 1, 2003.

Approaches to CE Financial Management. Presented at the UCEA Summer Institute for Continuing Education Professionals, Boston, July, 2003.

Alliances and Partnerships: Creating, Maintaining, and Assessing Value; and Shared Learning Objects: Why Hasn't This Taken Off? Presented at the UCEA National meeting, Chicago, March 2003.

Learning Management Systems (LMS); What They Are and Why They Are Important. Presented at the UCEA National meeting, April 2002, Toronto, Canada.

Meeting Business School Administrative and Financial Challenges and Opportunities. Presented at the AACSB International Finance and Administrative Conference, December 3, 2001, San Antonio, TX.

How Partnerships in Online Learning are Being Formed. Presented at the UCEA Executive Assembly, November 2001, Chicago, IL.

E-Learning as E-Business, the Structure of the Industry and University Responses. Also: Why a Dot.Com – Why Not? Lessons for Universities from the E-learning Dot-com World. Presented at the UCEA national meeting, April 2001, PA.

Budgeting Fundamentals of Course Financial Management, a professional development module presented at the UCEA national meeting, April 2001, Philadelphia, PA.

Choosing For-Profit Partners: Which ones are for Real? Presented at the Annual Meeting of the National Association of State Universities and Land Grant Colleges, November 14, 2000, San Antonio, Texas.

Courses, Curricula, and Research Portfolios, New Frontiers in University Intellectual Property Management. Presented at the NASULGC Commission on Outreach and Technology Transfer summer conference, June 8, 2000, Washington, D.C.

Budgeting Fundamentals of Course Financial Management, a professional development module presented at the UCEA national meeting, April 2000, San Diego, CA.

Spinning Off in the US. Presented at the OECD Workshop on Research-Based Spin-Offs, Organized by the Working Group on Innovation and Technology Policy, December 8, 1999, Paris, France.

The Web: It's More Radical Than You Think. Presented at the 1999 National Association of State and Land Grant Colleges' (NASULGC) annual meeting, November 9, 1999, San Francisco.

Continuing Education and Higher Education: A Professional Development Module. Presented at the 1999 UCEA Executive Assembly, September 11, 1999, Chicago, IL.

What UC Managers Need to Know About Online Education. Presented at the 1999 UC Management and Leadership conference, June 7, 1999, San Jose, CA.

University Intellectual Property Management in the 20th Century: How Did We Get Here and Where Are We Going? Presented at the Conference on Research and Development and Economic Growth in the 20th Century, March 27, 1999, University of California, Berkeley.

Developing and Delivering High Quality On-line Courses for Access-Challenged Students. Presented at the Colloquium & Research Universities in the Era of Virtual Education, March 11, 1999, Center for Studies in Higher Education, Berkeley, California.

Sustainability in a Changing Social context: How to Strengthen the Partnership Between Industry and Academia. January 29, 1999, Zurich, Switzerland.

Toward a Financial Model for the ALN Enterprise. presented at the Fourth International Conference on Asynchronous Learning Networks, November 14, 1998, New York, New York.

Adjusting Traditional Continuing Education Financial Systems to Meet New Managerial Paradigms. Presented at the University Continuing Education Association annual meeting, April 13, 1997, Louisville, Kentucky.

Global Partnerships: The Benefits of International Programming. Presented at the University Continuing Education Association annual meeting, April 12, 1997, Louisville, Kentucky.

Using Modern Information Feedback Systems and Creating Financial Structures to Support Continuing Education. Presented to the University Continuing Education Association, February 16-17, 1997, New Orleans, Louisiana.

Instructional Technology Seminar. Presented at the Center for Studies in Higher Education, 1995 - Present (Co-convener).

Knowing and Getting What You Need from Your Financial Information Systems. Presented at the Association for Continuing Higher Education, annual conference, October 28, 1996, Palm Desert, California.

Continuing Education Financial Management Systems: Getting and Using What You Really Need. Presented at the Barcelona European Universities Summer School, July 1996, Barcelona, Spain.

The University Role in Regional Economic Development: Lessons for Switzerland from America. Presented at the conference Zur Position der Schweiz im Internationalen Vergleich, August 1995, Zurich, Switzerland.

Rising to the Challenges of the New Higher Education Market Place, a Deans and Directors preconference institute presented at the UCEA national meeting, April, 2000, San Diego, CA.

Taking Stock of Taking Equity: The Last Frontier of University Technology Transfer. Presented to the European Association of Institutional Research, August 1995, Zurich, Switzerland.

Economic Research and Analysis and Issues in Technology Transfer, Patents, and Research Parks. Presented to the (NASULGC) Commission on Outreach and Technology Transfer, Strategic Working Conference, June 7-9, 1995, Washington, D.C.

Stepchild, Buffer, Conscience, Scout: The Role of Extension in UC's History. Presented at the Center for Studies in Higher Education, March 7, 1995, Berkeley, California.

Activity Based Costing and Multidimensional Budgeting. Presented at the 22nd Annual LERN Conference on Lifelong Learning Programming, November 3, 1994, Boston, Massachusetts.

Transferencia de Tecnologia Universidad-Industria. Presented at the 15th annual conference of Instituto Argentino de Ejecutivos de Finanzas, October 10, 1994, Ushuaia, Argentina.

Knowing (and Getting) What You Really Want from Your CE Management System. Presented at the NUCEA Summer CEO Seminar, July 19, 1994, Boston, Massachusetts.

Planning Financial Success. Presented at the LERN 21st annual conference on class programming, December 2, 1993, San Francisco, California.

Technology Transfer and Public Policy: Lessons from a Case Study. Presented at the Symposium for Technology Transfer and Public Policy: Preparing for the Twenty-First Century, October 30, 1993, Iowa State University, Ames, Iowa.

Start-Up Equity Ownership: University Technology Transfer's Last Frontier. Presented at the Third Annual International American Association of University Administrators conference, September, 1992, Innsbruck, Austria. (Paper published in proceedings, not presented.)

Elements of Responsible Financial Management. Presented at the NUCEA Summer Seminar for Continuing Education CEOs, July 19-22, 1992, Portland, Maine.

Benchmark Models for Organizing University Technology Transfer and Relations with Industry. Presented at the annual conference of the Business, Industry, and Labor Division of the National University Continuing Education Association, January 31, 1992, Fort Lauderdale, Florida.

Planning Conference Finances: How to Make the Budget Process Work for You. Keynote address at the annual conference of the Conferences and Institutes Division of the National University Continuing Education Association, December 4-7, 1991, Chicago, Illinois.

Budgeting in Continuing Education. Presented at the Joint Regional Conference of Regions VI and VII of the National University Continuing Education Association, October 10, 1991, Oakland, California.

Issues in Continuing Education Financial Management. Presented at the National University Continuing Education Association Seminar for Continuing Education CEOs, July 16, 1991, Oakland, California.

The Role of Continuing Education in University Technology Transfer and Economic Development Efforts. Presented at the National Conference of the National University Continuing Education Association, April 21-22, 1991, Miami, Florida.

Commercializing the University: The Practical Consequences of Overturning University Traditions, a paper presented at the annual meeting of the Association for the Study of Higher Education, November 2, 1990, Portland, Oregon.

Organizing and Budgeting Continuing Education. Workshop sponsored by the Kansas City Regional Consortium for Higher Education, September 21, 1990, Kansas City, Missouri.

Media Budget Planning. Presented at the spring meeting of the Consortium of College and University Media Centers, May 27, 1990, San Francisco, California.

The Role of the Business Officer. What Deans Think It Is; What It Really Is. Panel discussion presented at the National University Continuing Education Association 75th Annual Conference, April 30, 1990, New Orleans, Louisiana.

Technology Transfer at Berkeley. Seminar for Berkeley faculty and administrators in the Fall 1989 and Spring 1990 semesters, sponsored by the Center for Studies in Higher Education, directed by Professor Sheldon Rothblatt.

Memberships

Chancellor's Club, University of California, Irvine.

California Alumni Association

University Continuing Education Association

Commission on Outreach and Technology Transfer and Council on Continuing Education and Public Service, Association of Public and Land-grant Universities

ATTACHMENT 1

Seminars and Presentations Prior to December 31, 1988

Essentials of Organizing Budgeting presented at the National Continuing Education Association Division of Humanities, Arts and Sciences Conference, February 18, 1988, Washington, D.C.

Program Productivity in the Continuing Education Organization: Definition, Measurement, and How to Improve It, presented at the National University Continuing Education Association, Division of Humanities, Arts, and Sciences, Conference, February 20, 1988, Washington, D.C.

Program Productivity in the Continuing Education Organization: Definition, Measurement, and How to Improve It, presented at:

National University Continuing Education Association, Division of Humanities, Arts, and Sciences, Conference, February 20, 1988, Washington, D.C.

National University Continuing Education Association, 71st Annual Conference, April 27, 1986, Portland, Oregon

Collaboration Among Providers presented at the National University Continuing Education Association, 72nd Annual Conference, April 5, 1987, Kansas City, Missouri.

Continuing Education Organization and Course Budgeting, a two-day course presented at University of Wisconsin - Stout, Menominee, Wisconsin, November 13-14, 1986.

Evaluating the Cost Effectiveness of Promotion Expenditures, presented at:

American Association for Continuing Higher Education, National Conference, October 28, 1986, Philadelphia, Pennsylvania.

National University Continuing Education Association, 71st Annual Conference, April 27, 1986, Portland, Oregon.

National University Continuing Education Association, Region VI Conference, October 14, 1984, Phoenix, Arizona.

Portfolio Management in Program Planning, presented at:

National University Continuing Education Association, Region IV Conference, October 5, 1986, Minneapolis, Minnesota.

American Association for Adult and Continuing Education Association, National Adult Education Conference, November 7, 1985, Milwaukee, Wisconsin.

National University Continuing Education Association, Region VI Conference, October 14, 1985, Reno, Nevada (published in the proceedings of the conference).

Fiscal Creativity on Behalf of Continuing Education, presented at:

National University Continuing Education Association, 72nd National Conference, April 7, 1987, Kansas City, Missouri.

National University Continuing Education Association, 71st Annual Conference, April 25, 1986, Portland, Oregon.

Computers and Change in Continuing Education Organizations, presented at the National University Continuing Education Association, 71st Annual Conference, April 28, 1986, Portland, Oregon.

Not-for-Credit Record Keeping--The Berkeley Experience, presented at the American Association of College Registration and Admissions Officer, April 1981, San Francisco, California.