

# ANN M. MCGRATH

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## SUMMARY OF QUALIFICATIONS

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- Business acumen and broad management knowledge leveraged to improve operational efficiency and effectiveness, and generate positive financial results
- Skilled in strategic planning, operations, internal controls and financial analysis
- Demonstrated ability to successfully lead organizations through significant changes and periods of uncertainty
- Skilled in working across organizational boundaries to build relationships with multiple constituencies and stakeholders
- Excellent communication skills
- Strong mentor and coach with proven track record of identifying and retaining high-performers and developing future leaders

## PROFESSIONAL EXPERIENCE

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2016-Present **University of Arizona** Tucson, Arizona

***Senior Lecturer, School of Accountancy (2023-present)***

***Lecturer, Dhaliwal-Reidy School of Accountancy (2016-2023)***

Teach upper-division undergraduate and graduate level courses at the Eller College of Management. Combine technical knowledge with professional experience to effectively educate students from various disciplines in financial accounting, information for decision making, ethics, the roles and responsibilities of management and Boards of Directors in governance, and healthcare industry issues.

- Subject matter of courses includes generally accepted accounting principles (GAAP), generally accepted auditing standards (GAAS), the Sarbanes-Oxley Act of 2002 (SOX), AICPA Code of Professional Conduct, managerial accounting, healthcare finance and business communication.

2015-Present **McGrath Consulting LLC** Tucson, Arizona

***Principal***

- Provide business consulting services in the areas of strategic planning, tactical planning, operational assessments and improvement, and financial analysis.
- Facilitate strategic planning sessions, developing vision and mission statements, and assisting in the identification of company's values. Customize planning processes to generate implementable plans to achieve strategic goals.

- Perform independent assessments of companies' plans for growth and expansion. Assist executive teams in identifying targets and evaluating opportunities, including pros and cons of potential relationships from the perspectives of the client and the target.
- Evaluate organizational structures and assist in leader identification and succession planning activities; addressing current state and capacity to accommodate additional growth.
- Review financial models and underlying assumptions for reasonableness. Perform sensitivity analysis and other due diligence procedures.

2010-2015      **Banner University Medicine Division**  
**University of Arizona Health Network**

Tucson, Arizona

***Vice President, Management Consulting and Operational Improvement (2013-1015)***

***Vice President, Strategic Planning, Performance Improvement and Integration (2010-2013)***

- Led integration of discrete business activities into a single clinical enterprise to facilitate providing seamless, high-quality healthcare services to our patients and community. Over \$35 million of revenue enhancement and cost-savings were realized in the first 18 months.
- Directed UAHN's system-wide strategic planning process. Partnered with leadership of the University of Arizona College of Medicine (COM) to institute joint strategic goal setting to support the alignment of UAHN and COM strategic plans. Included leaders of the COM's clinical departments, basic sciences and Centers of Excellence to ensure inclusion of all stakeholder groups in the process.
- Led the development of and adoption by the Board of Directors of UAHN's Vision and Mission Statements. Responsible for the inclusive process used to create the UAHN Values, which engaged over 700 staff from UAHN and COM to participate in surveys and focus groups that developed the values and standards of behavior.
- Identified and prioritized performance improvement opportunities to address reimbursement changes, revenue challenges and operational inefficiencies. Developed action plans and performance monitoring processes to support realization of opportunities and maintain ranking in top quartile of University HealthSystem Consortium (UHC) academic medical centers. Created ad hoc management reports to fill voids created by implementation of new information systems. Identified financial trends, caused by changes in the external environment and by information system implementations, and developed actionable recommendations to offset the negative impact of these changes.
- Improved effectiveness of resource deployment by developing and implementing an independent review process for new and replacement staff requests. Created a process for forecasting RN needs and implemented timely, accurate monitoring and reporting of RN staffing resources and needs. Collaborated with nursing and human resources leaders to create and implement a mechanism to streamline recruitment and hiring to address critical staffing shortages.
- Partnered with operational owners or assumed management oversight for problematic departments and functions where results did not meet the organization's needs. Identified the root causes of the performance issues, and developed and oversaw implementation of action plans to resolve the issues, resulting in cost reductions, improved and streamlined processes, and higher service levels.
- Performed independent reviews of large, complex, and sensitive transactions using strong financial analysis skills and experience in assessing the reasonableness of accounting estimates.
- Drafted Board policies and Committee charters, for the newly created UAHN Board of Directors. Researched committee structures, composition and membership qualifications in support of the Board Chair and UAHN CEO.
- Mentor to clinical and non-clinical staff pursuing advanced degrees, participating in community and industry leadership programs and seeking enhanced management and business skills.

2002 – 2010 **University Medical Center**

Tucson, Arizona

***Vice President, Strategic Planning and Operational Improvement (2008-2010)***

***Interim Vice President, Emergency, Trauma and Perioperative Services (2008-2009)***

- Member of four person executive team responsible for Due Diligence process for merger of University Medical Center (UMC) and University Physicians Healthcare (UHC) based on professional experience with mergers and acquisitions, turn-around engagements and financial analysis. Prepared and delivered presentations to UMC Board of Directors on Due Diligence process, findings and management's recommendations.
- Implemented employee request validation process to ensure appropriate review and approval of replacement and new positions.
- Provided executive leadership to Emergency, Trauma and Perioperative Services in addition to Strategic Planning and Operational Improvement responsibilities. During this time, UMC had its first American College of Surgeons Verification Visit and successfully received its Level 1 Trauma Center designation.
- Negotiated contract for hospitalist coverage with measurable performance incentives.

***Director, Strategic Initiatives (2002-2008)***

- Established the Strategic Initiatives group at UMC to provide financial and operational consulting services within UMC, to develop and implement solutions, and to sustain improvements.
- Implemented operational benchmarking at UMC as an effective management tool. Created a benchmarking program to facilitate the identification of operational improvement opportunities, resulting in more efficient and effective processes and ranking in the top quartile of UHC academic hospitals.
- Performed financial analyses of proposed capital acquisitions and joint venture opportunities.
- Prepared pro forma financial statements for debt offerings.
- Updated UMC's strategic plan, included key stakeholders in the process, and ensured the development of implementation plans that aligned with the strategic plan and organizational goals.
- Oversaw the development of service line reporting capabilities for use in managing hospital operations and capital allocation decision-making processes.

1984 – 2002 **Arthur Andersen LLP**

Phoenix, Arizona

***Principal (1999-2002)***

- Managed services for clients in the healthcare, real estate, not-for-profit, and wholesale distribution industries in Arizona, New Mexico, and California. Directed employee benefit plan practice for Arizona.
- Planned and supervised financial statement audits and other attest work for clients with revenues ranging from \$13 million to \$2.5 billion. Client portfolio included SEC registrants, privately-held corporations, health systems and not-for-profit organizations.
- Assisted clients with due diligence on mergers and acquisitions, budgeting/forecasting, strategic planning, financings, regulatory filings, operational reviews and internal control assessments.
- Developed and communicated recommendations for improvements in clients' processes and practices to management, Audit Committees and Boards of Directors.
- Organized internal quality review program for Arizona and New Mexico financial statement assurance practices. Streamlined review process to achieve program objectives in a timely manner.
- Served as Arizona representative for the Partner Expert Network (PEN). Facilitated communication between Arizona assurance practice and Firmwide developers of audit methodology to enhance the methodology. Established improved training approach for financial statement assurance personnel.
- Served as training coordinator for the Desert Southwest Healthcare practice. Instructed Firmwide and local office training for assurance and support personnel.

- Led local Growth and Retention of Our Workforce (GROW) initiative which improved retention and morale of employees in all practice areas. Facilitated “focus group” meetings to determine critical issues, and supported subcommittees established to implement action steps.
- Recruited personnel for all solution segments and offices of Arthur Andersen. Interviewed experienced hires and campus recruits utilizing Critical Behavior Interview® methodology. Represented Arthur Andersen at college-sponsored and Andersen-sponsored recruiting events.
- Sponsored and supported numerous civic and community activities.

### ***Manager (1990-1999)***

- Managed services for clients in the healthcare, not-for-profit, real estate, financial services and wholesale distribution industries in Arizona, New Mexico, California and Hawaii.
- Planned and supervised financial statement audits and other attest work for clients with revenues ranging from \$5 million to \$2.5 billion.
- Researched complex accounting and financial reporting issues.
- Assisted clients with due diligence procedures related to mergers and acquisitions, budgeting/forecasting processes, strategic planning, public debt offerings, regulatory filings, operational reviews and internal control evaluations and enhancements.
- Directed healthcare training program for Arizona and New Mexico, including creating training courses to supplement Firmwide training.
- Presented to community organizations on topics relating to business issues and careers in accounting.

### EDUCATION

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- Bachelor of Science in Business Administration, Emphasis in Accounting, University of Arizona, Tucson, Arizona
- Masters of Business Administration, University of Phoenix, Tucson, Arizona

### PROFESSIONAL MEMBERSHIPS / COMMUNITY ACTIVITIES

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- Volunteer, Marana Unified School District (2013-present)
- Volunteer, Primavera Foundation (2015-present)
- Member, Healthcare Financial Management Association (1986-2010, 2015-present)
- Member, Eller College Associates (2015-2024)
- Chair, Supervisory Committee, Vantage West Credit Union (2018-2019)
- Member, Supervisory Committee, Vantage West Credit Union (2016 – 2018)
- Steering Committee Member, Senior Operations Officers Council, University HealthSystem Consortium (2014-2015)
- Member, Senior Operations Officers Council, University HealthSystem Consortium (2011-2015)
- Member, Strategic Planning Council, University HealthSystem Consortium (2010-2013)
- Member, Women at the Top (2013-2015)