



Position Profile
Search for Vice President for Finance and Administration
Oregon State University
Corvallis, Oregon

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About Oregon State University

Oregon State University (OSU) is a leading international public research institution grounded in the Land Grant tradition of bringing research, teaching, and outreach and engagement to bear on the most pressing challenges facing Oregon and the world today. Founded in 1868, OSU is one of only two universities in the United States to have Land Grant, Sea Grant, Space Grant and Sun Grant designations. Oregon State is also the only university in Oregon to hold both the Carnegie Foundation's top designation for research institutions and its prestigious Community Engagement classification. Oregon State's faculty are global leaders in their fields, advancing the science of earth ecosystems, improving human health and wellness, promoting social progress and serving as an engine for economic growth. With \$336 million in external research funding in the 2016 fiscal year, Oregon State's impact reaches across the state and beyond. Oregon State, with 11 colleges, 15 Agricultural Experiment Stations, 35 county Extension offices, the Hatfield Marine Science Center in Newport, Oregon and OSU-Cascades in Bend, Oregon has a presence in every one of Oregon's 36 counties, with a statewide economic footprint of \$2.23 billion. OSU is the state's largest university, with annual revenues of \$1.13 billion, and is home to more than 30,000 students from all 50 states and more than 90 nations, and is the university of choice for high-achieving Oregon students.

The University launched Phase I of the Strategic Plan for the 21st Century in 2004 to serve as a foundation for advancing the University to be among the top Land Grant universities in the nation. The first two phases of the plan guided a decade of transformational progress at OSU. In 2014, the University launched Phase III to build upon ten years of momentum and to affirm the campus' commitment to the University's mission, vision and three strategic goals:

- Provide a transformative educational experience for all learners;
- Demonstrate leadership in research, scholarship and creativity while enhancing preeminence in the three signature areas of distinction: Advancing the Science of Sustainable Earth Ecosystems, Improving Human Health and Wellness, and Promoting Economic Growth and Social Progress; and,
- Strengthen Oregon State's impact and reach throughout Oregon and beyond.

The plan also focuses on an aspiration to be a true community – a community that holds itself accountable for nurturing healthy relationships, building networks of care, embracing shared governance, and acknowledging and celebrating humanity.

The University's work is guided by principles of equity – ensuring equality of opportunity in all that we do; inclusion – working together to create an organization that supports success for everyone with whom we interact; and diversity – recognizing that a diversity of people, perspectives, experiences, and thought as essential to a compelling research, scholarship and learning environment.

2015-2016 was a year of notable achievements at Oregon State.

- For the third year in a row, enrollment exceeded 30,000 students, and the University awarded more 6,231 bachelor's degrees.
- OSU-Cascades located in Bend, Oregon, welcomed its first class of freshmen in fall 2015 and opened its new campus in fall 2016. This was the state's first new public university campus to open in more than a half century.
- Oregon State Ecampus again was judged one of America's best providers of online education. In January 2016, OSU's online bachelor's programs were ranked among the top 10 in the nation by U.S. News & World Report for the second year in a row.
- The College of Liberal Arts and the Graduate School launched the nation's first graduate degree program in Environmental Humanities to prepare students for careers in environmental policy, social justice and the arts.
- OSU seismic experts continue to provide significant contributions to understanding the prospects and reduce the impact of natural disasters globally, including the threat of a Cascadia earthquake in the Pacific Northwest.
- In fiscal year 2015, Oregon State faculty generated a record \$309 million in research funding – nearly the combined research of Oregon's six other public universities. In FY16, research grants and awards exceeded \$336 million. The University continued to see growth in industrial partnerships and entrepreneurial activities as well, and it is the leading Oregon university in these efforts.
- OSU and other Oregon public universities saw substantial increases in state funding, which will improve access to college for more students.
- Oregon State's recent capital campaign, The Campaign for OSU, concluded at the end of 2014, having raised \$1.14 billion to renovate or build 28 buildings; endow 79 faculty positions; support new research and teaching programs; and provide \$189 million for donor-funded scholarships and fellowships. In 2015 and 2016, that momentum continued with donor gifts totaling \$250 million for that two-year period.

OSU Strategic Plan for the 21st Century:

<http://leadership.oregonstate.edu/strategicplan/strategic-plan-phase-iii-2014-2018>

About OSU: <http://oregonstate.edu/main/about>.

OSU Board of Trustees: <http://leadership.oregonstate.edu/trustees>

About the Division of Finance and Administration

The Division of Finance and Administration (DFA) has an annual budget of \$63 million and consists of more than 460 employees working within twelve units – Administrative Services; Budget and Fiscal Planning; Business Affairs and Finance; Capital Planning and Facilities; Human Resources; OSU Shared Services; Procurement, Contracting and Materials Management; Public Safety; Risk Management; and Transportation Services. Through these units, the Division of Finance and Administration provides leadership, innovative services, creative solutions, and integrated systems ensuring success in the University's mission. *For a detailed description of the units within DFA please see Appendix A, pages 9-10.*

The DFA was previously led by W. Glenn Ford from July 2013 through February 2016, and is currently being overseen by Michael Green, Interim Vice President for Finance & Administration. Before joining OSU as Associate Vice President for Finance & Administration in January 2014, Mr. Green served the Oregon University System for 23 years, most recently as Associate Vice Chancellor for Finance and Administration/Controller. He is highly regarded within the University and the state's higher education system, and is continuing to advance the goals of the DFA.

The role of the DFA has changed significantly in recent years. Primary drivers of the DFA's transformational change include the implementation of the University's strategic plan, together with the University's independent operating status with its own Board of Trustees. With greater authority over and responsibility for OSU's finances and policies, the DFA has greater freedom to plan in the best interests of students, faculty, staff, and other stakeholders. The DFA has been adapting to and embracing new responsibilities and processes inspired by these changes, striving to deliver excellent service and to be viewed as an innovative partner.

Although the University is fiscally strong and operationally healthy, there are a number of challenges and opportunities facing the next Vice President.

- The University's continuing transition from state agency to assumption of greater internal responsibility impacts many areas of administrative practice, such as bond issuance, and fiscal controls that will need to be managed with prudence, resourcefulness, and creativity.
- The ongoing effort to develop financial planning and projection tools that better integrate the needs of all aspects of the University. Such tools provide University administrators with greater visibility and more information about future needs and challenges and how best to respond to a changing financial climate.
- Increased numbers of students and faculty require long range planning for improvement of facilities and infrastructure to meet their needs in Corvallis, Newport and in Bend.
- Deferred maintenance needs are estimated to total approximately \$650 million and continue to grow, while new campus space is also being developed. At the Corvallis campus, a number of new buildings and renovations have recently been completed, and at the same time, new projects are being developed in Corvallis, for the OSU-Cascades campus in Bend, and for the cross-disciplinary Marine Studies Initiative that will include new facilities at or near the Hatfield Marine Science Center in Newport. These will all require careful planning and management.
- An increased attention to public safety on university campuses across the nation is changing the structure and processes of public safety functions at OSU. Additionally, the ever-present possibility of a major seismic event caused by movement of the Cascadia subduction zone off the Pacific Coast is a major driver on emergency preparedness at the Corvallis campus and at the Hatfield Marine Science Center, which has the added exposure of a significant tsunami wave.
- The state of Oregon has among the lowest percentages of per-student funding in the nation, while the cost of education has continued to increase. The University has found creative ways to generate new revenue streams through increasing numbers of out-of-state and international students, but the state's expectations in its 40-40-20 plan for increasing the number of Oregon high school and college graduates and educational certificate holders will be a challenge without increased funding and a growing reliance upon public/private partnerships.
- The rapid growth of the University has impacted transportation and parking matters, as well as the rental and housing market and traffic in Corvallis, placing pressure upon the University's relations with the city. The creation of Collaboration Corvallis has been designed to address many of these issues. The Vice President serves on a City-OSU collaborative leadership group.

- The Division of Finance and Administration’s overall organization needs to be realigned to better respond to the above opportunities and the goals outlined in OSU’s Strategic Plan 3.0. The DFA leadership team is in the process of developing a Division Strategic Plan that centers around three main goal areas: Service, Safety and Health, and Stewardship.

The University’s aspirations for growth and excellence require a Vice President for Finance and Administration with experience in all aspects of financial planning and operational management, operation and planning of a complex university physical environment; and the successful administration of human capital. The aspirations and strategic priorities of the University require a Vice President who can think strategically about creative opportunities; who can balance capital requirements with bonding issues; who can work collaboratively with University leaders; who can navigate an evolving terrain of relationships with the Legislature, Board, and the other public universities within Oregon; who can help the University realize the benefits of institutional autonomy; who can communicate effectively with all internal and external stakeholders and constituents; and who can contribute to making the University’s intellectual environment, community, and student experiences richer, more vibrant and more inclusive.

*About the Division of Finance & Administration: <http://fa.oregonstate.edu/>
Management & Budget Reports: <http://fa.oregonstate.edu/budget>*

The Position

The Vice President for Finance and Administration (VPFA) is the chief financial officer (CFO) of the University and reports to, and serves at the pleasure of, the President. The VPFA provides leadership, oversight, and stewardship for all aspects of the University’s financial resources while ensuring absolute institutional integrity on fiscal and human resource matters. The VPFA serves as a strategic advisor to the President and Provost and recommends financial and administrative objectives, policies, programs and practices that ensure a sound financial structure and physical environment for the University. Working with the President and the Provost, the VPFA is responsible for operating and capital budget planning and for developing a long-term sustainable economic model that ensures the viability of the University. As CFO, she or he is responsible for the management of financial matters and for risk management and compliance with audit, legal, and donor requirements, IRS, federal and state regulations, and financial aid regulations. The VPFA controls the flow of cash through the organization and maintains the integrity of funds. The Vice President works with the OSU Foundation and Alumni Association to ensure the integrity of interactions and to provide institutional support for adherence to fiduciary boundaries and constraints.

The Vice President serves as the institutional representative on financial and capital matters to the OSU Board of Trustees. In this capacity, she or he is involved in discussions regarding tuition setting, the financial health of the University, allocation of resources among Oregon higher education institutions, and approval of capital plans and projects.

The VPFA oversees an administrative organizational structure that includes all aspects of finance, business services, human resources, capital planning and construction, facilities maintenance, transportation, and public safety. The VPFA supervises the heads of units comprising Finance and Administration and works closely with Intercollegiate Athletics, University Housing and Dining Services, Alumni Relations and the OSU Foundation.

The VPFA is a significant contributor to advancing the mission and strategic direction of the University, which includes promoting a climate of inclusion and equity.

The VPFA serves as a member of the President’s Cabinet and the Provost’s Council at OSU, as well as on the Oregon University Vice Presidents Council, which advises the seven public university presidents on state-level fiscal matters. In support of and in collaboration with the Provost and Executive Vice President, the VPFA actively participates in university budget policy decisions, while promoting fiscal accountability. Additionally, the VPFA, along with the Provost and others, serve in critical liaison and oversight roles related to the operation of INTO Oregon State University, Inc. (INTO OSU*). [*Since its inception in 2008, INTO OSU has helped to more than double the OSU international student population, serving the University’s overall internationalization goals.]

Additional Specific Responsibilities

- Creating and implementing a broad and compelling vision and sustainable business plan for the Division of Finance and Administration and assessing their effectiveness;
- Providing continuous evaluation of short and long-term strategic financial objectives;
- Producing budgets, forecasts and other financial statements and reports;
- Providing executive management with advice on the financial implications of business activities, the costs of strategic priorities, and options for funding strategies;
- Ensuring that effective accounting controls are in place and ensuring compliance with Generally Accepted Accounting Principles (GAAP) and applicable federal, state, and local regulatory laws and rules for financial and tax reporting;
- Fostering collaborative relationships with auditors;
- Managing the ongoing operation and maintenance of the University’s physical infrastructure;
- Developing and implementing long range capital plans;
- Negotiating major contracts for the University; reviewing and executing existing major contracts;
- Creating and sustaining an environment of service excellence, effectiveness and innovation;
- Leading and supporting the Division’s commitment to contributing to a diverse and multicultural university;
- Ensuring effective strategies to address security, safety, emergency planning and risk management;
- Engaging collaboratively with the City of Corvallis on issues related to capital planning, transportation and safety;
- Supporting the University’s management of human capital;
- Collaborating with other senior leaders throughout the University to proactively address emerging needs and successfully undertake new opportunities;
- Directly supervising leaders of the DFA units; and
- Presenting budgets, capital projects and initiatives to key stakeholders, such as the OSU Board of Trustees, legislators, and the OSU Foundation Board.

Salary is competitive, and the benefits package includes several options for health/dental/life insurance, retirement, options for retirement planning, and a program of reduced tuition for dependents (some restrictions apply).

Selection Criteria & Qualifications

The University seeks an innovative and strategic leader with a broad vision for the role of finance and administration in achieving institutional excellence at a Land Grant university. The successful candidate will have a strong track record in managing change along with proven experience as an organizational and financial leader. She or he will have superb management skills and business acumen, be adept at facilitating connections

and building partnerships and collaborations, and be able to serve as a trusted and respected member of the leadership team. The successful candidate must possess an undergraduate degree (graduate degree, MBA, or CPA equivalent are preferred). She or he will be comfortable building relationships of trust with the many communities that comprise the University, and be astute at navigating the political landscape. The VPFA must fit within an OSU culture that values tradition, inclusion, service and humility, collaboration, shared governance, clarity of decision-making, and the ability to balance priorities in service to the larger educational, research, and outreach mission of the institution.

The University seeks candidates with all or most of the following:

Leadership

- At least ten years in progressively responsible financial and administrative leadership roles, with comprehensive budget and financial planning experience and responsibilities within a large, complex environment; proven experience developing financial and physical infrastructure strategies that support academic and strategic priorities – preference for individuals who have had leadership roles in higher education as well as experience running a business that provides goods or services
- Leadership skills with the ability to set challenging and attainable goals, set priorities, and work with and inspire others to high levels of creative performance, and to leverage ideas into action; able to lead and navigate as the University grows toward top Land Grant status;
- Strong influence and relationship skills, able to command the respect and earn the trust of individuals within and outside the University;
- Collaborative and team-oriented leadership style; good judgment in recognizing talent and assessing where improvements are needed; the ability to make appropriate connections and build synergies; an open and creative approach to problem solving and a willingness to address issues without territoriality; the ability to understand and enable diverse viewpoints and approaches to achieve University goals;
- Outstanding oral and written communication skills that are both respectful of diverse viewpoints and can inspire stakeholders both inside and outside the Division of Finance and Administration;
- Preference for individuals who have leadership experience in the finance *and* the administrative dimensions of the VPFA role

Experience/knowledge in the field

- Understanding of the Land Grant mission of the University and the issues facing public higher education; experience working at a Land Grant/large research university would be desirable, as would experience with central and remote campus locations;
- Administrative ability, including budget and financial management processes, strategic planning, policy formation, campus development and real estate acquisition, and personnel management;
- Clear and informed understanding of federal policies that govern compliance and of legal restrictions that affect program activities;
- Clear understanding of the roles/responsibilities of the Foundation and Alumni Association and how they should operate effectively in collaboration with the University;
- Ability to engage the OSU Board of Trustees; state representatives, legislators, corporate, and other external stakeholders in the goals of the institution;

Organizational & management skills

- Demonstrated ability to provide management oversight, leadership, and strategic direction; evidence of excellent organizational skills and organizational development skills, financial and human resources management skills; a clear sense of goals and timelines;

- Experience in creating a highly responsive organization; ability to leverage limited resources while achieving innovative results;
- Demonstrated ability to recruit, retain, and reward high quality staff; a flexible, engaged, and open management style that delegates authority, empowers staff, sets high expectations, and holds departmental colleagues accountable;
- A results-oriented and evidence-based leader who can introduce best practices and is unafraid to take measured risks and unconventional approaches in quest of excellence and reputational growth;
- A fair, firm, and compassionate administrator who can confront and make difficult decisions, resolve conflict, and demonstrate and promote transparency, integrity and high ethical standards within the institution;
- Demonstrated commitment to building community, embracing diversity and vigorously promoting equity and inclusion;

Collaboration

- Collaborative skills in teaming with colleagues and working with an innovative energetic faculty and a unionized non-faculty workforce; able to work collegially across the institution, to build relationships and connections, and to motivate, mobilize and energize others to work together;
- Dedication to faculty engagement and shared governance; willingness to engage in thoughtful discussion with faculty in envisioning and implementing institutional change and a commitment to support faculty efforts;
- Able to work effectively with industry and corporate partners to find creative approaches to meet university and workforce development needs;

Competencies

- A Bachelor's degree is required, with a preference for an advanced degree such as an MBA and/or CPA equivalent;
- Evidence of ideas, imagination, creativity, passion, courage, optimism and good judgment;
- Evidence of sophistication around institutional communication; excellent listening skills; capacity to understand nuance;
- Outstanding interpersonal skills, energy, sincerity, self-confidence, a "can-do" and enabling attitude, combined with patience, perseverance, the ability to deal constructively with conflict and criticism, and a good sense of humor.
- The highest degree of personal integrity.

Location

OSU's main campus is located in Corvallis, a community of 58,000 people in the heart of western Oregon's Willamette Valley, located about 90 miles south of Portland, 36 miles south of Salem, the state capital, and one hour from the Pacific Coast and the Cascade Mountains. Corvallis is a vibrant college town, and is consistently ranked among the best and safest cities to live in the United States. It is at the top of the list of most affluent cities in Oregon and number two among the most educated cities in the U.S. Recently, Corvallis was ranked the fourth best overall college city in America by WalletHub. It was also named one of the most secure small towns in the U.S. by the Farmers Insurance Group, and *Sunset* magazine named Corvallis one of its five favorite eco-friendly small towns. Known for being one of the most environmentally responsible towns, Corvallis sits in the middle of Oregon's finest recreational and scenic areas: ocean beaches, lakes, rivers, forests, high desert, and the rugged Cascade and Coast Ranges are all within a short driving distance. OSU has a presence in every county

of the state, including 15 Agricultural Experiment Stations, 35 county Extension offices, the Hatfield Marine Science Center in Newport and OSU-Cascades in Central Oregon.

Applications, Inquiries, and Nominations

Review of applications will continue until the position is filled. Inquiries, nominations, and applications are confidential and should be directed to Alberto Pimentel or Emy Peña at Storbeck/Pimentel & Associates – 562-360-1612.



Alberto Pimentel, Partner or Emy Peña, Principal
Storbeck/Pimentel & Associates
6512 Painter Avenue
Whittier, CA 90601

Electronic submissions are preferred. Please email us at stsearch@storbeckpimentel.com Code: OSUVPFA

Applications should include a letter of interest, including a statement of philosophy for the vice president role and addressing each of the qualifications for this position; CV; and contact information for five current references, including each reference's name, title, address, telephone number, and electronic mail address.

OSU commits to inclusive excellence by advancing equity and diversity in all that we do. We are an Affirmative Action/Equal Opportunity employer and particularly encourage applications from members of historically underrepresented racial/ethnic groups, women, individuals with disabilities, veterans, LGBTQ community members, and others who demonstrate the ability to help us achieve our vision of a diverse and inclusive community

Appendix A: Division of Finance and Administration

The units within Finance and Administration handle the following responsibilities:

Administrative Services provides support to the Vice President's Office related to long-range business and financial planning. The director coordinates OSU's engagement with state-level organizations including the Higher Education Coordinating Council, the Oregon Education Investment Board, the Department of Administrative Services, and the Legislative Fiscal Office. The Administrative Services Office acts as the liaison with the government relations offices at OSU and the other public universities.

Budget and Fiscal Planning is responsible for preparing the annual and biennial budgets for the University; processing and managing OSU's annual budget allocation; ensuring compliance with state, federal and other budgetary guidelines; preparing and distributing budgetary reports; providing fiscal planning support for academic, research, and public service units; and developing and maintaining online reporting and reimbursement systems. Historically OSU has had an incremental core budget with a layering of responsibility-centered management to provide incentives for growth in certain areas such as summer school and distance education.

Business Affairs and Finance develops and maintains the University's sound financial and internal control structure in alignment with OSU's strategic plan, state and university policy and GAAP. It oversees student finance, the ID center, payroll, and financial accounting and analysis. Business Affairs includes the Office of the Controller and the Director of Treasury, which together oversee external financial reporting; integrated financial planning; cash and investment management; capital financing and debt management; and taxation.

Capital Planning and Facilities provides oversight of capital planning; building and renovation projects; real estate and space management; university land use planning; GIS services; and infrastructure maintenance. Responsible for OSU's 570-acre Corvallis campus (which features a wide variety of natural and built environments and is included in the National Register of Historic Places), as well as planning and development of the Bend and Newport campuses, Capital Planning and Facilities is dedicated to providing a high quality built environment that supports OSU's learning and research mission.

Human Resources is comprised of Employee Benefits; HR and Clery Compliance; Classification and Compensation; Employee and Labor Relations; Strategic Staffing and Workforce Planning; HR Systems and Technology; Learning and Organizational Development. It offers direction and services to the OSU community with the goal of achieving an effective and high quality workforce at Oregon State University.

Risk Management works to protect OSU's people and resources by identifying potential exposures and developing effective solutions that support OSU's mission. It offers risk consultation, emergency preparation and training, environmental health and safety, and international travel support. It facilitates access to various types of insurance necessary for OSU research and business, and assists with filing claims.

Procurement, Contracts and Materials Management supports the University mission by providing effective management of OSU's resources. Procurement manages the competitive processes and establishment of contracts, and is committed to being a leader in supplier diversity. Contract Services advises and guides colleges and departments in meeting their contracting needs in areas outside the context of procurement, capital

projects, and research. Materials Management manages the University's surplus property and campus recycling, with the goal of improving the use of assets and minimizing OSU's waste stream.

Public Safety is responsible for providing a safe campus for students, faculty, staff, and visitors to the University; for facilitating OSU's educational, research, and community service goals; and for providing its services with the highest degree of professionalism. The Department works in partnership with the Oregon State Police, which is responsible for law enforcement, criminal investigations, traffic enforcement, bicycle enforcement, accident response, crowd control and crime prevention.

OSU Shared Services provides financial, accounting, budgeting, and procurement services to colleges and departments across the University through seven business centers. Through both transactional and consultative services, the business centers assist administrative leaders with financial management analyses and forecasting. They work collaboratively with the Office of Human Resources to assist leaders in developing a stable and diverse workforce. Shared Services translates policy into service for the University community, and is committed to effective resource stewardship and to the continuous development of employee expertise in service to the students, faculty and staff. OSU Shared Services seeks to continually increase efficiency and customer satisfaction.

Transportation Services consists of Parking Services, Transportation Options (alternatives to driving), Motor Pool, and the Beaver Bus shuttle system. It offers a variety of programs and services that help students, faculty, staff and visitors use all available modes of travel to access the University and to further its academic and research mission. Transportation Services is committed to providing commuter options that reduce the number of single-occupant vehicle trips to and from OSU, and it partners with other OSU departments to reduce greenhouse gas emissions and incentivize the use of walking, biking, and ride-share alternatives.