ASSOCIATE VICE PRESIDENT FOR BUDGET AND RESOURCE PLANNING

Leadership Profile
June 2023

Executive Summary

Oregon State University seeks an experienced, creative and strategic individual to lead its Office of Budget and Resource Planning, a unit of the Division of Finance and Administration (DFA). DFA enables the university’s mission by being a trusted, innovative and collaborative partner that builds and delivers programs connecting every member of the OSU community to resources, people, environments and systems that are vital to excel and succeed. In addition to the Office of Budget and Resource Planning, the division includes the Controller's Unit; the Enterprise Project Portfolio Management Office; Environmental Health and Safety; DFA Information Technology; Insurance and Risk Management Services; Procurement, Contracts, and Materials Management; Public Safety/OSU Police; and University Facilities, Infrastructure and Operations.

OSU is Oregon’s land grant university, holds sea, sun, and space grant designations, and is among the world’s top 2% of universities. It is the state’s only institution to hold both a Carnegie R1 (very research-intensive) designation and Carnegie Community Engagement classification. The university consists of its main campus in Corvallis, the OSU-Cascades campus in Bend, one of the nation’s best and most respected online education programs (Ecampus), joint programming with Eastern Oregon University, the Hatfield Marine Science Center in Newport, and the OSU Portland Center. Through its two campuses, centers in Newport and Portland, agricultural research experiment stations, Extension offices, and research forests, OSU has a presence in all 36 Oregon counties.

The Office of Budget and Resource Planning enables informed decisions and promotes sound use of public resources in alignment with Oregon State’s mission and goals. The Associate Vice President for Budget and Resource Planning (AVP) is responsible for strategic oversight of the Budget and Resource Planning office. In this role the AVP directs efforts to support university-wide fiscal planning, the ten-year business forecast; and support systems for university-wide academic and financial analytical and decision-making.

The AVP reports to the Vice President for Finance and Administration (primary report) and the Provost and Executive Vice President (secondary report), is a member of the DFA Senior Leadership Team and the Provost’s Senior Leadership Team, and serves as a resource and support to the senior executive administration of the university on all budgeting activities.

The AVP needs to be effective in an environment of collaborative, shared decision making, working closely with fellow members of DFA leadership team, the Provost's Senior Leadership Team, the University Cabinet, the Provost’s Council of Deans, the Academic Senate, and other academic and administrative leadership bodies across OSU. The AVP works to accommodate processes and technical requirements of the Oregon Higher Education Coordinating Commission (HECC) with consideration of the university’s specific needs and in collaboration with Oregon’s other public universities. The AVP works closely with the Vice President for Research, the Vice President and Director of Intercollegiate Athletics, the Senior Associate Vice President for Administration, and the Associate Vice President for Finance and Controller on fiscal operations and decisions.

Resource Stewardship for a 21st Century University

The Office of Budget and Resource Planning develops and implements policies and procedures to help ensure the efficacy and integrity of resource allocations, budget planning and resource management of the university. The office is responsible for all-funds budget operations, including responsibility for all
revenue planning activities, preparation and control of annual and biennial budgets for the University, its instructional and research divisions, statewide public service units, and auxiliary enterprises.

The associate vice president for budget and resource planning (AVP) oversees development of Oregon State University’s all funds budget in collaboration with leadership of its various units, with a particular emphasis on the Education and General Funds (E&G) budget, provision of university-wide fiscal planning support, development of tuition rate projections and recommendations for university senior leadership; the development, submission, allocation, and maintenance of the university’s annual and biennial budget materials to the Oregon State University Board of Trustees; preparation of the university’s Ten-Year Business Forecast; administration of support systems for university-wide academic and financial analytical and decision-making needs; coordination of the University Budget Committee, an advisory body to the Provost; development and administration of information and special reports for executive decision-making support; direction of the day-to-day operation of the Office of Budget and Resource Planning, including supervision of six professional employees, graduate assistants, plus support staff. All departmental responsibilities and services are critical to the operation of the University in achieving its mission.

The AVP works to integrate processes and technical requirements from Oregon’s Higher Education Coordinating Commission (HECC) with the university’s needs and in collaboration with other Oregon public universities. The AVP works closely with the college Deans, Chancellor and Dean of OSU-Cascades, Vice President for Research, the Vice President and Director of Intercollegiate Athletics, the Senior Associate Vice President for Administration, and the Associate Vice President for Finance and Controller on fiscal operations and decisions.

Leading Institutional Change

The university is developing OSU’s next strategic plan to succeed the current 2019-2023 plan — Strategic Plan 4.0: Transformation, Excellence and Impact — beginning in January 2024. A steering committee of faculty, staff and students is guiding the planning effort. Once this roadmap is finalized, all of OSU’s leaders will be responsible for making the plan a reality. The AVP will have input in how updated university priorities and plans are implemented and operationalized.

Other priorities for the university’s new AVP for Budget and Resource Planning include:

- Collaborating with University Information and Technology and university leaders to implement OSU’s Administrative Modernization Program (AMP), a 5-year, $50M effort beginning in FY23 to replace the university’s 34-year-old core administrative systems for human resources, payroll and finance, enabling the university to deliver its mission with a greater impact and at a lower cost.
- Supporting the OSU Foundation as it engages in a $1.75 billion fundraising campaign to help fund OSU’s strategic priorities.
- Contributing to strong collaboration with the Higher Education Coordinating Commission as it advocates for public higher education funding across Oregon.
- Continuing to refine OSU’s Shared Responsibility Budget Model.
- Maintaining and advancing, in collaboration with other DFA units, OSU’s ten-year business forecast.
- Stewarding a transparent and trusting relationship with OSU’s Board of Trustees.

The AVP directs decisions on overall fiscal planning and budgetary strategy and works with both internal and external constituencies. The AVP must exercise frequent and sound judgments and oversees confidential and sensitive financial and budgetary information. The AVP’s decisions and guidance on budgetary and fiscal matters impact all units and organizational levels in the university and stakeholders outside of the university. The AVP’s decisions have significant, broad implications for strategy development and for the management and operation of the university. The AVP is responsible for leading decisions that impact the university’s overall strategy and direction.
Position Responsibilities
Expectations for the AVP include (100%):

- Sustaining and implementing a compelling vision and resource alignment for the university in the context of OSU's strategic plan;
- Providing effective leadership to foster success and advance the university's mission;
- Establishing and maintaining cooperative and effective linkages with OSU’s academic departments, schools, colleges, and other units;
  - Connecting university resource planning to strategic institutional and unit planning;
  - Strategizing with academic units and the Vice President for Research to develop and administer indirect cost recovery allocations;
  - Providing university leaders with consultative support for budget control at the unit level for college deans, vice provosts, and vice presidents;
  - Engaging strategically and collaboratively with senior leaders and unit heads to support operational and strategic decision making;
  - Leading efforts to provide senior leaders and academic chairs/heads access to budget data and analytics, as well as training, to enable sound budgeting decisions and effective planning processes
- Supervising the preparation of budget materials for internal university budget and fiscal planning processes;
- Participating in the university's funding process with Oregon Higher Education Coordinating Commission (HECC) and the Oregon legislature;
- Leading in a manner consistent with OSU’s commitment to shared governance;
- Creating and sustaining an environment of programmatic excellence within the Office of Budget and Resource Planning;
- Establishing as a priority the commitment to a diverse and multicultural workforce within the Office of Budget and Resource Planning;
- Managing human, financial, and other resources to optimize effectiveness within the Office of Budget and Resource Planning;
- Contributing to the overall success and health of the university through university-level committees, task forces, and advisory councils;
- Collaborating with other senior leaders on university-wide initiatives;
- Providing leadership of university-wide strategic initiatives, as assigned.

Professional Qualifications
All qualified candidates for the AVP for Budget and Resources Planning position will hold the following qualifications and characteristics:

- A Bachelor’s degree and an advanced degree in a relevant field (e.g., economics, finance, accounting, business administration) or a terminal degree;
- Demonstrated understanding of the unique financial opportunities and challenges facing universities and their academic and administrative leaders, and the ways in which revenues are generated and costs managed in an academic institution;
- Minimum of five years of senior management experience and progressive budget responsibility with different fund types at a major research university, major medical center, or a comparably complex organization;
- Strong quantitative, strategic, and fiscal analytical skills, with the ability to develop innovative, elegant approaches to complex issues;
- Demonstrated understanding of shared governance in higher education, the university research mission, interdisciplinary academic programs, innovative teaching, and outreach;
• Superior interpersonal and communication skills; ability to foster collaboration and teamwork; ability to work collegially; ability to inspire others to high levels of performance;
• Demonstrated ability to articulate and align people around a vision that is responsive to institutional change and moves the institution forward;
• Demonstrated administrative ability, including strategic planning, communications, budgeting and financial management, engagement, policy development, and personnel management;
• A demonstrable commitment to promoting and enhancing diversity;
• This position is designated as a critical or security-sensitive position; therefore, the incumbent must successfully complete a criminal history check and be determined to be position qualified as per University Standard: 05-010 et seq. Incumbents are required to self-report convictions and those in youth programs may have additional criminal history checks every 24 months.

Candidates will be considered highly qualified if they hold these preferred qualifications:

• At least eight years of experience in senior academic administrative leadership position(s) (e.g., department chair or head, school head or director, or dean) at a major research university;
• Rank of tenured professor;
• Clear understanding of the mission of a land grant institution;
• Experience with fund or government accounting;
• Experience with the HECC (Oregon Higher Education Coordinating Committee) or other state agencies with oversight of complex organizations.

About Oregon State University

Founded in 1868, Oregon State University is Oregon’s land-grant university, serving more than 35,000 students, with more than 5,200 faculty and staff and a $1.6 billion annual budget. OSU is a collaborative, inclusive, and caring community that strives for equity and equal opportunity; offers a welcoming environment and enables success for people from all walks of life; and shares common, fundamental values grounded in justice, civility and respect. OSU is one of only three universities in the nation with land, sea, space, and sun grant designations.

Oregon State is Oregon’s statewide university with its main campus in Corvallis; its OSU-Cascades campus in Central Oregon’s Bend; the Hatfield Marine Science Center in Newport; extension centers and programs in all of Oregon’s 36 counties; thirteen branch agricultural experiment stations; the OSU Forest Research Laboratory; and the OSU Portland Center.

OSU offers nearly 200 undergraduate and graduate degree programs through its 11 academic colleges, its Honors College, and the Graduate School. The university’s academic colleges are Agricultural Sciences; Business; Earth, Ocean, and Atmospheric Sciences; Education; Engineering; Forestry; Liberal Arts; Pharmacy; Public Health and Human Sciences; Science; and the Carlson College of Veterinary Medicine. In addition, OSU offers more than one hundred undergraduate and graduate degree programs through its online education program, Ecampus, which is ranked No. 5 in the nation for best online Bachelor’s programs in the 2022 edition of U.S. News and World Report.

In June 2023, Oregon State graduated 7,338 students from its Corvallis campus – fourteen students more than a record graduating class in 2021 – and sixty-two students from its OSU-Cascades campus.

Oregon State’s talented faculty produce top scholarship across many academic disciplines. Year after year, OSU receives more external research funding than any other comprehensive university in Oregon. In fiscal year 2022, faculty secured more than $471 million in research grants and contracts, the sixth consecutive year that OSU funded research exceeded $380 million. In line with the university’s strategic plan, OSU’s shared research agenda guides faculty inquiry in three signature
areas: advancing the science of sustainable earth ecosystems, improving human health and wellness, and promoting economic growth and social progress.

The mission of Oregon State University, faculty scholarship and OSU’s commitment to student success and access are supported by the philanthropic and engagement efforts of the OSU Foundation and Alumni Association. In October 2022, Oregon State announced its second university-wide fundraising campaign: “Believe It: The Campaign for Oregon State University.” Donors have already committed more than $1 billion to the campaign, which seeks to raise $1.75 billion to support OSU priority initiatives, including student access and success, faculty positions, academic programs, research, statewide community engagement programs, OSU Athletics, and facilities on OSU’s Corvallis campus and OSU-Cascades campus in Bend.

In fiscal year 2022, the OSU Foundation raised a record $216.9 million while managing an endowment of $764.5 million. More than 50,000 donors, volunteers, alumni, and others are globally engaged with OSU in FY22.

OSU Governance and Management Structure

The leadership of Oregon State University is committed to making and implementing decisions through collaboration, shared governance, transparency, accountability and effective communication. OSU leaders at all levels—the Board of Trustees, president, provost, vice presidents, vice provosts, deans, Faculty Senators, heads and chairs, directors, ASOSU leaders, OSU Foundation and Alumni Association leadership, and others—strive to take innovative, creative and entrepreneurial actions that continually move the university toward realizing its vision as a leading land grant research university.

A single Board of Trustees, appointed by Oregon’s governor, oversees the university. OSU’s Faculty Senate oversees all of OSU’s curricula wherever and however it is delivered. All OSU students—regardless of campus—earn an OSU degree and receive an OSU diploma. OSU is accredited by the Northwest Commission on Colleges and Universities as well as the various professional accreditations of programs based in Corvallis and Bend.

Why OSU?

Working for Oregon State University is so much more than a job!

Oregon State University is a dynamic community of dreamers, doers, problem-solvers and change-makers. We don’t wait for challenges to present themselves — we seek them out and take them on. We welcome students, faculty and staff from every background and perspective into a community where everyone feels seen and heard. We have deep-rooted mindfulness for the natural world and all who depend on it, and together, we apply knowledge, tools and skills to build a better future for all.

Facts

- A university among the top 2% in the world
- More annual research funding than all public comprehensive universities in Oregon combined
- One of three land, sea, space and sun grant universities in the U.S.
- Two campuses, 11 colleges, 12 experiment stations, and Extension programs in all 36 counties
- Seven cultural resource centers that offer education, celebration and belonging for everyone
- 100+ undergraduate degree programs, 80+ graduate degrees plus hundreds of minor options and certificates
- 35k+ students including more than 2.3k international students and 10k students of color
- 217k+ alumni worldwide
- For more interesting facts about OSU visit: https://oregonstate.edu/about
Campus Locations

Oregon State’s beautiful, historic and state-of-the-art main campus is located in one of America’s best college towns. Corvallis is located close to the Pacific Ocean, the Cascades mountains and Oregon wine county. Nestled in the heart of the Willamette Valley, this beautiful city offers miles of mountain biking and hiking trails, a river perfect for boating or kayaking and an eclectic downtown featuring local cuisine, popular events and performances. OSU’s only branch campus—OSU-Cascades—is located in Bend, Oregon, a spectacular high mountain setting and one of the fastest growing cities in the West.

Total Rewards Package

Oregon State University offers a comprehensive benefits package with benefits eligible positions that is designed to meet the needs of employees and their families including:

- Medical, Dental, Vision and Basic Life. OSU pays 95% of premiums for full-time employees and their eligible dependents.
- Free confidential mental health and emotional support services, and counseling resources.
- Retirement savings paid by the university.
- A generous paid leave package, including holidays, vacation and sick leave.
- Tuition reduction benefits for employees or qualifying dependents at OSU or the additional six Oregon public universities.
- Robust work-life programs including dual career assistance resources, flexible work arrangements, a Family Resource Center, Affinity Groups and an Employee Assistance Program.

Future and current OSU employees can use the Benefits Calculator to learn more about the full value of the benefits provided at OSU.

Applications, Inquiries and Nominations

**Review of applications is underway and will continue until the position is filled.**

A completed application will include, as separate documents, a CV or resume and a letter of interest addressing the themes and qualifications outlined in this leadership profile.

For full consideration apply by July 26, 2023 at jobs.oregonstate.edu by searching for position number P07039UF under the academic and professional faculty section. Fill out the application and upload your documents. The search will remain open until the position is filled.

Questions can be directed to VPFA@oregonstate.edu.

*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.*

Additional Resources

- About OSU: [https://oregonstate.edu/](https://oregonstate.edu/)
- OSU Strategic Plan: [https://leadership.oregonstate.edu/strategic-plan](https://leadership.oregonstate.edu/strategic-plan)
- About the Division of Finance and Administration: [https://fa.oregonstate.edu/](https://fa.oregonstate.edu/)
- About the Office of Budget and Resource Planning: [https://fa.oregonstate.edu/budget](https://fa.oregonstate.edu/budget)