



OHIO
UNIVERSITY

Leadership Profile

**VICE PRESIDENT OF FINANCE
AND ADMINISTRATION AND CHIEF
FINANCIAL OFFICER (VPFA-CFO)**



THE SEARCH

*Ohio University (OHIO) invites applications and nominations for the position of Vice President for Finance and Administration and Chief Financial Officer (VPFA-CFO). OHIO is a research university and the oldest public university in the state. It is financially healthy with a growing enrollment exceeding 28,300 students, with two consecutive years of record enrollment for incoming students. With a new President and a Board committed to the University's mission, it is poised to advance further. OHIO's dynamic strategy will launch in the coming year, **informing a forward-looking roadmap to guide the institution's work for the next three years.** The student body includes students from all 88 Ohio counties, every state in the nation, and more than 100 countries. OHIO is located in Athens – a quintessential college town nestled in the Appalachian foothills of gorgeous Southeast Ohio.*



Ohio University presents an unmatched opportunity for a financial leader who can facilitate a budget model and financial management structure that empowers deans and vice presidents to respond to the marketplace, grow revenue and make the best use of the resources of their respective units. The leader will provide guidance and support on how to align the institution's financial, physical, and human resources with the University's strategy and mission. The Vice President will also lead and represent a large and diverse division that provides many critical services. The division needs a leader who can enhance a culture of professional development, manage service expectations, and enhance a climate of reward and recognition.



ABOUT THE UNIVERSITY

*Ohio University is the state's first and finest University.
Since our founding in 1804 as the first institution of higher learning
in the Northwest Territory, we've never stopped evolving.*

Ohio University is the oldest public university in the state of Ohio. Our total enrollment is over 28,000 students across the state and online. OHIO is home to more than 250 academic programs in a variety of fields including business, communications, healthcare, social sciences, the arts, and STEM. The University's focus is to ensure student success through access to real industry and research experiences at an affordable cost, which is why Ohio University is ranked the No. 1 Best Value public university in the state of Ohio, according to U.S. News & World Report. The stunning 1,740-acre main campus is located in what has been consistently named one of America's best college towns. The campus seamlessly merges with Uptown Athens, which is rich with local food culture and within walking distance of historic neighborhoods. Today, OHIO is classified as a research university with very high research activity by the Carnegie Foundation.



THE ROLE OF OHIO'S VPFA-CFO

Reporting to the President, the VPFA-CFO is the chief fiscal officer charged with the fiduciary integrity of the university and leadership for all financial and physical resources. The most important task for the new VPFA-CFO will be leading the development of a budget model and financial policies that can result in innovation and sustainability for the University. The VPFA-CFO leads the Finance and Administration division, a broad portfolio of functions including finance, budget, controller's office, investments, treasury, real estate, community relations, economic development, safety and risk management, facilities, police, and business services. The division is seeking an individual who can build trust, set clear service expectations, and enhance a culture of reward and recognition,

The VPFA-CFO guides the development, implementation, and monitoring of OHIO's operating and capital budgets from multiple sources of funding (general funds, auxiliary enterprises, self-support operations, private donations, external debt, and state funds). They also oversee the development, implementation, revision, and integration of related institutional policies and compliance, as well as applicable state and federal laws.

The VPFA-CFO, in partnership with the President and the Executive Vice President and Provost, also plays a key role in institutional planning and positioning.

LEADERSHIP OPPORTUNITIES

New Leadership Team

Dr. Lori Stewart Gonzalez, a seasoned academic leader who has committed her career to public higher education, became Ohio University's 23rd president on July 1, 2023. President Gonzalez is leading the development of a new strategic plan and has hired a number of new institutional leaders. It is a time of great hope and excitement at the University. The next VPFA-CFO will have the opportunity to lead a division that is optimistic and ready for the future.

Improved and inclusive budgetary process

With experience working in different budget models, the successful candidate will assess OHIO's recent budget model and make recommendations for improvements. Critical to the successful use of any budget model will be the incorporation of a governance process for the budget which effectively engages and supports the academic mission of the University.

Strategic investments

This individual will help move OHIO away from a risk averse culture to one of risk tolerance through helping to identify successful, strategic growth investments in programs, technology, and processes that will expand thinking beyond the traditional university model.

Alignment of resources with the strategy and mission

The VPFA-CFO will work closely with the President, Provost, and other senior leaders to ensure budget allocation decisions are being made with the academic mission of the University in mind as well as consideration of return-on-investment criteria. Enrollment and marketing will be central to this effort.

Strategic investments

This individual will help move OHIO away from a fiscally conservative culture to one of risk tolerance through helping to identify successful, strategic growth investments in programs, technology, and processes that will expand thinking beyond the traditional university model.

Participates in developing a short- and long-term growth strategy

Working with the President and Provost, the new VPFA-CFO will have the opportunity to assess the current financial picture and will contribute to the development of a growth strategy for the future.

They will collaborate in evaluating the University from both an enterprise-wide perspective as well as across and within colleges and groups of colleges, to help identify where strategic investments can be made.

Leading multifunctional team

The breadth of the VPFA-CFO's responsibilities include finance, budget, controller's office, investments, treasury, real estate, facilities, police, and business services. Critical to the success of the VPFA-CFO is leading this multifaceted team in developing opportunities for synergistic work, advancing efficiencies, and continually providing service excellence to advance the mission of OHIO.

Supports and drives culture change

The VPFA-CFO will build transparency and trust within their units and across the university at large. In advancing Ohio University's mission, this organization needs to be customer-service centric, implementing efficiencies through process improvement, shared services, and new technology investments.

Strategic systems and process assessment

Appreciating the value of digital tools, the VPFA-CFO will have the opportunity to review and assess the current financial platforms, process improvements, and technology investments. They will be able to participate in developing the strategic plan for technology investments to reduce costs and ensure the delivery of reliable, timely, accurate data for reporting and forecasting to the president and board.

RESPONSIBILITIES

Specific responsibilities include, but are not limited to:

- Serves as a member of the President’s Cabinet, charged with contributing to the University’s strategic planning to ensure appropriate allocation of resources in support of the University’s mission and priorities.
- In collaboration with the President, Board of Trustees, and Senior Leadership, coordinates the development of the University’s annual operating budget and its biennial operating and capital budget. Conducts financial analysis and planning to ensure the financial viability of the University, while maintaining student access through reasonable tuition and fee rates.
- Develops and maintains an effective and efficient financial management and reporting system that properly accounts for all revenues and expenditures of the University through the application of federal and state regulations and guidelines, appropriate audit and oversight methods, and regularly scheduled planning and review meetings with university leadership.
- Collaborates to coordinate the planning, financing, and construction of all capital outlay projects, including the acquisition and disposition of land and the leasing of facilities required by the University, while maintaining compliance with policies and procedures defined by the State of Ohio.
- Ensures availability of adequate and appropriate equipment, staffing, and systems; recommends additional staffing and efficiencies of services.
- Ensures compliance with federal, state, local, and organizational laws, regulations, guidelines, and best practices, including but not limited to tax laws, generally accepted accounting principles (GAAP), federal acquisition regulations (FAR), and cost accounting standards (CAS).
- Maintains knowledge of developments and trends in finance and administration, including technological advances.
- Facilitates implementation of new systems and major modifications of existing systems to reduce downtime and enhance administrative efficiencies.
- Works with space planning to develop overall capital strategy to meet prioritized needs.
- Oversees physical plant and grounds in a manner that assures the campus environment is attractive and functional by implementing maintenance reserve, major renovation, and beautification projects concurrently with administering an effective, ongoing program of facility maintenance and repair that protects the University’s assets.
- Provides overall direction for ongoing efforts related to energy conservation and adoption of sustainable practices.
- Oversees purchasing, contract administration, and property control in response to the institution’s needs as identified through regularly scheduled planning and review meetings with university leadership, appropriate constituent groups, and service recipients.
- Provides auxiliary business services that assure financial viability and responsiveness to market demand for mail center, parking and transportation, and airport operations.
- Provides leadership in the planning and implementation of the University’s efforts to promote local and regional economic development through collaboration with businesses and other private and public sector entities.
- Provides oversight to the University’s police and public safety units.
- Serves as an ex-officio member of the Ohio University Foundation Board

QUALIFICATIONS AND EXPECTATIONS

The ideal candidate will have:

- A record of significant leadership achievement in a research university, a state government system, or in health care administration. Candidates with prior private industry experience will also be considered.
- Knowledge and experience with budget models that align with strategy and that create incentives for innovation.
- Demonstrated capacity to facilitate change working collaboratively and transparently with multiple stakeholders.
- Experience managing and motivating multiple service operations with clear expectations and accountabilities.
- Ability to communicate clearly, effectively, and collegially with the many constituencies who contribute to the success of the university.
- Ability to think creatively and strategically.
- Commitment to diversity, equity and inclusion.
- Understanding of the compelling mission, challenges, and governance of public higher education.





PRESIDENT LORI STEWART GONZALEZ

Dr. Gonzalez received her Bachelor of Arts degree from the University of Kentucky in speech pathology and audiology, a Master of Arts degree in communication disorders from Eastern Kentucky University and a Ph.D. in communication disorders from the University of Florida.

She began her academic career at Southern Illinois University at Carbondale in 1988. In 1991, she returned to UK as an assistant professor in the Communication Sciences and Disorders program. She then spent 20 years in roles as a professor and associate dean of Academic Affairs. In 2005, she was appointed dean of the College of Health Sciences, a position she held for seven years. In 2011, Dr. Gonzalez moved to Appalachian State University, where she served as provost and executive vice chancellor for three years, followed by a year as special advisor to the senior vice president for Academic Affairs at the University of North Carolina System. From 2015 until the spring of 2021, she served as the vice chancellor for Academic, Faculty and Student Affairs at the University of Tennessee Health Science Center in Memphis. In April of 2021, Dr. Gonzalez was appointed executive vice president and university provost at the University of Louisville, followed by one year of service as interim university president.

A native of the Appalachian region, Dr. Gonzalez was born and raised in the small town of Mt. Vernon, Kentucky. She credits her commitment to public education to her parents, who believed in the transformative power of education and instilled in her a responsibility to give back to her community.



ABOUT THE ATHENS COMMUNITY

What strikes most Athens newcomers is the area's dedication to cultivating community. Founded in 1797, Athens was an important stop on the Underground Railroad and became a gathering place for coal miners in the area, giving rise to the United Mine Workers of America.

Athens, the location of Ohio University's residential campus, is regularly named one of America's Best College Towns and it is easy to see why. Athens is big enough to keep students, staff and faculty entertained and on the go, yet small enough to always feel comfy and close-knit.

Sports fans root for the OHIO Bobcats (and our incredible Marching 110) or join an intramural or community team to get in on the action. Those craving a slice of city life sample the many nearby restaurants,

coffee shops, cultural events and shows, from rising local stars on Donkey Coffee's stage to top national names passing through on tour stops.

However, it isn't only students who embrace Athens' unique magic. Positioned amongst some of the state's best hiking trails and parks, a nationally recognized farm to table food scene, a vibrant Uptown (never call it





downtown) filled with shops, a long-running farmers market, a place in the Top 100 Art Communities in America and a long history of campus and city activism related to sustainability and social justice, Athens has also been named one of today's "50 Best College Towns to Live in Forever."

Auditorium or outside the West Portico on College Green, catch a blockbuster movie or local film festival at the historic Athena Cinema uptown, or keep things casual by joining in a jam session at one of the many local award-winning craft breweries. Meet neighbors and keep the spirit of cultivating community alive in a local organization or service opportunity, such as volunteering with local nonprofits and programs like Passion Works and the Athens County Food pantry.

In short, our small college town packs unforgettable memories into every moment. More information on Athens and its surrounding areas can be found at athensohio.com.



Outdoor lovers visit Sells Park for a bike ride, Strouds Run State Park for a day hike or paddle around the lake, or the Hockhocking-Adena Bike Path for a pedal or a morning jog under the cherry blossoms. Arts and culture connoisseurs might join community members at a Performing Arts Series show at Templeton-Blackburn Alumni Memorial





ABOUT OUR REGION

The road to adventure doesn't end at the city limits. Athens is located in Southeast Ohio, a region known for its natural beauty and outdoor destinations. With Strouds Run State Park, the Hocking Hills region and Wayne National Forest nearby, more than a quarter-million acres of Ohio's best hiking, paddling and more



await. Annual local events like the Ohio Pawpaw Festival and the Nelsonville Music Festival celebrate the area's natural beauty and reputation for not only being a growing tourist destination, but also a family-friendly and safe place to live. The perennial favorite Nelsonville Music Festival brings music's biggest names to mingle with local luminaries for a one-of-a-kind event. And the region's restaurants have been ahead of the farm-to-table curve for decades.

Cities from Chicago to D.C. are within easy road trip range, but with so much to do in your own backyard, we'll forgive you if you spend most of your weekends here, exploring all Southeast Ohio has to offer.

ATHENS, OHIO BEYOND THE BRICKS



INTERNATIONAL STREET FAIR • PAWPAW FESTIVAL • HOCKING VALLEY SCENIC RAILWAY • NELSONVILLE FINAL FRIDAYS • ATHENS BREW WEEK • ATHENS FARMERS MARKET • 30 MILE MEAL • WAYNE NATIONAL FOREST • STROUDS RUN STATE PARK



ATHENS AND THE SURROUNDING AREA

COLUMBUS, OH	— 76 MILES
CHARLESTON, WV	— 90 MILES
CINCINNATI, OH	— 157 MILES
LEXINGTON, KY	— 184 MILES
PITTSBURGH, PA	— 201 MILES
CLEVELAND, OH	— 217 MILES
INDIANAPOLIS, IN	— 250 MILES
DETROIT, MI	— 277 MILES
NASHVILLE, TN	— 423 MILES
CHICAGO, IL	— 431 MILES

- City of Athens
www.ci.athens.oh.us
- Athens County Visitor Bureau
athensohio.com
- Athens City Schools
athenscsd.org
- Athens Farmers Market
athensfarmersmarket.org
- Hocking Hills
hockinghills.com
- Strouds Run State Park
parks.ohiodnr.gov

APPLICATION AND NOMINATION PROCESS

AGB Search is pleased to assist Ohio University with this search.

To apply for the Vice President of Finance and Administration and Chief Financial Officer position, candidates are requested to submit: 1) a curriculum vitae or resume, 2) a letter of interest that addresses the leadership opportunities and desired experiences and attributes in this profile and 3) contact information for five references (to be contacted at a later date with candidate's permission) to <http://bit.ly/4bRVzj4> by **August 5, 2024**, for best consideration. The search will remain open until an appointment is made.

Contact information for AGB Search representatives assisting Ohio University:

Nominations and expressions of interest are encouraged.

Please direct them to OhioUVPFA@agbsearch.com or to one of the AGB search consultants listed below.

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ohio.edu

Ohio University is committed to creating a respectful and inclusive educational and workplace environment. Ohio University is an equal access/equal opportunity and affirmative action employer with a strong commitment to building and maintaining a diverse workforce. Women, persons of color, persons with disabilities and veterans are encouraged to apply.

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