



SOUTHWESTERN
UNIVERSITY

**Assistant Vice President, Budget and
Planning**

Leadership Profile

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WittKieffer

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Organization Overview



Southwestern University, with a rich history spanning nearly two centuries, is actively seeking a dynamic executive to assume the role of Assistant Vice President, Budget & Planning. Founded in 1840 as the first institution of higher learning in Texas, Southwestern has stood proudly as one of the nation's oldest and finest liberal arts institutions. The founders, driven by a vision of a better tomorrow, laid the foundation for a college that would blend the wisdom of the ages, the knowledge of the present, and the ideals of the future through a liberal arts education.

This tradition continues at Southwestern, where a blend of the arts, sciences, languages, and humanities inspires students to carve unique pathways toward their life passions and fulfilling careers. The university equips its students with the ability to adapt to an ever-changing world, encouraging the application of creative and critical minds to the opportunities and challenges of the 21st century.

Southwestern University's roots trace back to the visionary Methodist missionary Martin Ruter, who inspired four root colleges, culminating in the establishment of Southwestern University in 1872. Throughout its history, the university has achieved numerous milestones, marking several firsts in Texas higher education. Homecoming, now a global tradition, had its origins at Southwestern in 1909. The university boasts having three of the first five Rhodes Scholars in Texas, founding the first student literary journal in the state, and achieving victory in the first college baseball game in Texas in 1884.

During World War II, Southwestern played a vital role through its participation in the Navy's V-12 program, contributing to the war effort and gaining recognition as a football powerhouse in the 1940s. In 1993, the Carnegie Foundation named Southwestern a national liberal arts institution, recognizing its commitment to academic excellence. Notably, in 2010, Southwestern became the first university in Texas to have all its electricity supplied by wind power, showcasing its dedication to sustainable practices.

Located in the heart of the "Silicon Hills" near Austin, Texas, Southwestern University offers unparalleled learning experiences and career opportunities. With over \$120 million invested in capital projects and plans for a liberal arts-inspired community on over 560 contiguous acres, Southwestern is poised to continue its legacy as a national leader in liberal arts education into its third century.

Southwestern University's Mission Statement

Southwestern University, under the auspices of the United Methodist Church, is committed to undergraduate liberal education involving both the study of and participation in significant aspects of our cultural heritage, expressed primarily through the arts, the sciences, the Institutions, and the professions of society. As a teaching and learning community, Southwestern encourages rigorous inquiry and scholarship, creative teaching, and the expression of free human life. The University seeks to involve the student in finding a personal and social direction for life, developing more sensitive methods of communication, cultivating those qualities and skills which make for personal and professional effectiveness, and learning to think clearly and make relevant judgments and discriminations.

Officially adopted by the faculty and the Board of Trustees in 1972, amended in 2001, 2008, and 2011.

Southwestern University's Core Purpose

Fostering a liberal arts community whose values and actions encourage contributions toward the well-being of humanity.

Southwestern University's Core Values

- Cultivating academic excellence.
- Promoting lifelong learning and a passion for intellectual and personal growth.
- Fostering diverse perspectives.
- Being true to oneself and others.
- Respecting the worth and dignity of persons.
- Encouraging activism in the pursuit of justice and the common good.

Vision

Southwestern University is a leader in innovative undergraduate education, offering a life-enriching residential liberal arts and sciences experience for talented individuals who share a passion for intellectual exploration, engagement, and growth. Discovery and creation are intentionally fostered throughout a diverse and inclusive community of students, faculty, staff, and alumni, empowering all to advance research, scholarship, and the creative arts and lead fulfilling lives that contribute to the well-being of humanity.

Strategic Direction for the Next Five and Ten Years

Southwestern University commits to empowering students to think, create, and make meaning through intentional connections, innovative academic pursuits, and a vibrant residential community. This ongoing commitment to the rich experiences essential to intellectual, personal, and professional success in the 21st century requires institutional financial sustainability achieved through collaborative innovation and creativity.

Leadership

President Laura Skandera Trombley



Dr. Laura Skandera Trombley is the 16th president of Southwestern University and its first woman president. In her inaugural year she led the development of a 5-Year Tactical Plan that has already resulted in many key improvements on campus ranging from student recruitment, advising and retention to major upgrades in student recreational, dining and housing amenities. She also led the development of a master plan that is transforming the campus with multiple enhancements to the built environment.

She recently led the university in a successful \$80 million bond issuance that will help fund more than \$120 million in improvements to campus including two new mixed-use residence halls and a welcome center, a new mixed-use Athletics Complex, and a major remodeling of historic Mood-Bridwell Academic Hall.

This fall, after two years as president, Dr. Trombley welcomed one of SU's largest incoming classes ever, while graduates from 2021 reported that 98 percent of them were employed, in graduate school, or volunteering. Under

her leadership SU has also risen dramatically among the best liberal arts institutions in the nation, recently moving up 13 places in U.S. News & World Report's 2023 Best Colleges rankings—the biggest single-year jump in school history—while also being recognized as a top school for advancing the social mobility of recent graduates.

Prior to joining Southwestern Dr. Trombley served as the president of the University of Bridgeport. Under her leadership U.S. News & World Report ranked the University of Bridgeport for the first time among the top 381 national universities. She is also president emerita of Pitzer College, where she served for 13 years, and The Huntington Library, Art Collections, and Botanical Gardens. Previously, she served as vice president for academic affairs and dean of the faculty at Coe College in Cedar Rapids, Iowa.

A tenured professor in SU's Department of English, Dr. Trombley is the author of five books and is widely recognized as one of the most distinguished Mark Twain scholars in the world. A recipient of many awards, Dr. Trombley was recognized by the Mark Twain Journal as its Legacy Scholar in the spring of 2019 for her efforts in rehabilitating the intellectual reputations of the women who surrounded Mark Twain. In 2017 she won the Louis J. Budd Award for her contributions to Mark Twain studies.

Dr. Trombley graduated summa cum laude with a Master of Arts in English from Pepperdine University. She received her doctorate in English from the University of Southern California.

Position Summary

Reporting Relationships

This position will support the Vice President for Finance and Administration (CFO) and will be responsible for providing effective leadership and direction over all policies, practices, and procedures related to the development and management of the University's multiyear financial plan, annual operating and capital budgets, and all financial analyses. The Assistant Vice President is a strategic partner with various campus leaders, including the President's Senior Staff.

Responsibilities

The successful Assistant Vice President, Budget and Planning candidate will:

- Lead the budgeting and financial planning function at the University and directly supports the VP for Finance and Administration and senior leadership in advancing organizational goals and initiatives.
- Provide strategic leadership in advancing a best-in-class budgeting, financial planning, and analysis operation by continuing to enhance existing processes and oversight and management of the University's annual operating and capital budgets, as well as the various unit components and related collaboration with associated staff.
- Participate in and lead cross-functional project teams focused on implementing solutions that help modernize and improve University business processes.
- Coordinate the distribution, collection and consolidation of department budgets, expenditures, projections, and monthly financial performance reporting. Monitor fund sources, budget, revenue and expenditures trends, updating budgets, projections, making recommendations to solve funding issues and developing related reports.
- Ensure budget monitoring and controls are utilized. Develop reports for departments to provide transparency into the budgets under their control and responsibility.
- Develop and implements technology solutions that support the development, tracking, and measurement of the University's strategic and tactical plans, the annual operating and capital budgets, and related ongoing financial analyses.
- Develop collaborative relationships with the VP for Finance and Administration, the President's Senior Staff, and other key colleagues across campus to provide support and to promote an optimal environment that includes allocating financial resources based on thoughtful and transparent planning.
- Provide support to the VP for Finance and Administration in developing presentation materials and financial analyses for various meetings, including the Board of Trustees and Fiscal Affairs Committee meetings, the weekly Senior Staff meetings, and various meetings, as needed.
- Monitor and report on various credit- and debt-related metrics to ensure the University is in good standing with all creditors.
- Submit annual financial reporting/survey deliverables (credit rating agencies, IPEDS, NACUBO, US News & World Report, etc.).

Goals and Objectives

The following goals and objectives have been identified as priorities for this position:

- Learn the history and culture of the Southwestern University, the formal and informal leadership networks and how they all connect. Develop relationships with key individuals in each of the divisions of the University in order to provide the community with the best customer service in financial and business operations.
- Gain the confidence and trust of the senior leadership team within Southwestern University. Develop positive, professional relationships and earn the reputation as a credible and respected member of the peer management team.
- Foster relationships and become a strong partner and communicator with the Finance and Administration teams.
- Develop and direct the strategic and long-range goals of the department, developing plans, analyzing data, and aligning goals to achieve the University's objectives.
- Become a partner with the Vice President of Finance and Administration. Establish a reputation as someone who can get the work done efficiently, accurately, and independently.
- Identify opportunities to modernize the business processes throughout the division including centralized accounting, finance, and budget processes within Southwestern University.
- Provide strategic leadership and continuous evaluation to ensure effective accounting/finance operations. Gain a solid understanding of the data and reporting systems.
- Identify opportunities to improve efficiency with the use of technology and other performance improvement initiatives. Review and make recommendations regarding technology, best practices and analytical tools.
- Develop monthly, semi-annual and annual reports and management tools.
- Model and promote a dynamic customer service orientation across both campuses and encourage an openness of communication and transparency in decision-making and information dissemination.

Candidate Qualifications

Education/Certification

- Bachelor's degree in Accounting, Finance, Business Administration or a related field.
- Master's degree in related field and/or CPA preferred.

Knowledge and Work Experience

- Minimum of ten years of progressively responsible financial management experience in higher education; more than ten years preferred.
- Higher education experience.

Leadership Skills and Competencies

- Advanced financial analysis, financial modeling, and technology skills; knowledge of various budget models, software solutions, and strategic planning.
- Ability to integrate complex operational and financial considerations using critical thinking; must be analytical, detail-oriented and able to multi-task without sacrificing accuracy or timeliness.
- Experience communicating and presenting (both oral and written) to diverse small and large groups and the ability to convey technical information in lay terms that can be understood by people with a variety of educational and working backgrounds.
- Ability to develop policies and operational procedures for the overall department and campus as a whole; interprets and applies complex directives, policies, regulations, statutes, and procedures, and/or written guidelines for a department or major work group.
- Must exercise excellent interpersonal skills, demonstrating poise, tact, diplomacy and an ability to establish and maintain effective working/professional relationships with internal and external University constituents.
- Demonstrated knowledge, understanding, and acceptance of cultural differences and the diversity within the campus and community.
- Requires the highest level of judgment for the overall department, in which critical long-term consequences on decision-making can occur.
- Ability to responsibly handle sensitive and confidential information and situations.
- Ability to work independently and as part of a team.
- Demonstrated a strong work ethic.
- Ability to be flexible, adjust to fluctuating priorities, and produce reliable work product.

The Community

Georgetown, Texas



Sip a glass of Texas-made wine on the “Most Beautiful Town Square in Texas.” Explore the dark depths of one of the few show caves in Texas or kayak a scenic lake. These are just some of the things you’ll experience in the city of Georgetown, a quaint place that offers a little bit of everything that defines the Hill Country. Travel to Georgetown and you’ll find charming restaurants, boutique shops, tantalizing

scenery, and a relaxed small-town ambiance, all just 30 miles north of the bustling metropolis of Austin.

The history of Georgetown dates back to 1848, when the city’s namesake, George Washington Glasscock, donated land for the town site with his partner Thomas B. Huling. Clean and clear water and the abundance of timber played a large role in attracting settlers, who in the next 50 years would arrive from the United States, Sweden, Germany, Austria, Switzerland, the modern-day Czech Republic, and Mexico. This diverse heritage lives on to this day; to see it, all you need to do is look at the Victorian-era storefronts in the Georgetown downtown square, the ornate columned courthouse, and the [more than 100 historic homes throughout the city](#). Much of Georgetown’s history is retold in [The Williamson Museum](#) in, you guessed it, the downtown square.

Georgetown’s square is one of the city’s top attractions. Within all the magnificently restored buildings that line the square, you’ll find antique and clothing shops, coffee shops, restaurants, and three wineries ([Georgetown Winery](#) and [Grape Creek Winery](#)) as well as [Kork Wine Bar](#). There’s also the [Georgetown Palace Theatre](#), a community performing arts venue adorned with mid-20th century art deco flair that conducts musicals and plays throughout the year.

If you’re the type of person who prefers rugged adventure over modern comfort, there’s much about Georgetown that you’ll love. For a truly one-of-a-kind experience, go on the Wild Cave tour at the [Inner Space Cavern](#), a four-hour adventure that takes you through primitive areas of a large cave system. For some fun in the sun, make your way to [Lake Georgetown](#), a popular place to go swimming, fishing, camping, or boating. Hiking and biking are popular things to do in Georgetown as well. There’s a 28-mile trail, the Goodwater Loop, which surrounds Lake Georgetown, as well as a 9-mile trail that follows the river from [San Gabriel Park](#) to the lake or visit [Garey Park](#) which has its own set of trails, pavilions, and fishing ponds.



Fantastic architecture, plenty of outdoor recreation, and a convenient location just north of Austin make Georgetown a compelling destination for your next Texas vacation. Plot your next trip here and you’ll see why this is a must-see place in the Lone Star State.

Procedure for Candidacy

The search process is currently underway and will continue until the position is filled. Nominations, expressions of interest, and résumés should be submitted electronically to the WittKieffer [Candidate Portal](#) or via email to Toni Davis at tdavis@wittkieffer.com

The WittKieffer consultants supporting this search include:

Diane Smith

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Southwestern University values diversity and is committed to equal opportunity for all persons regardless of age, color, disability, ethnicity, marital status, national origin, race, religion, sex, sexual orientation, veteran status or any other status protected by law.

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