



**TULANE  
UNIVERSITY**

## **Associate Vice President for Financial Aid**

**Leadership Profile**

November 2024



***WittKieffer***

## Executive Summary

Tulane University invites nominations and applications for the Associate Vice President for Financial Aid. This leader oversees comprehensive financial aid services and processes for all student populations, including undergraduate, graduate, professional, and online programs. The successful candidate will be responsible for developing and implementing innovative financial aid strategies, ensuring regulatory compliance, and enhancing the overall student experience through effective financial aid services. This position provides an exciting opportunity to contribute to Tulane's mission and impact the lives of students through innovative financial aid solutions.

Tulane is undergoing rapid transformation, with funded research doubling over the past decade, numerous new initiatives across various departments, and strong enrollment demand. The financial aid office is poised to evolve alongside these changes, and the new Associate Vice President will play a crucial role in this transformation. This includes addressing emerging needs of today's students—undergraduate and graduate, full-time and part-time, in-person and online—and implementing technology and automation in service of the student experience. The University seeks a leader who is open to innovative approaches and will build on the strong financial state of the university and its operations.

The Associate Vice President directly supervises three directors and reports to the University's Vice President for Enrollment Management. In total, the Office of Financial Aid has a full-time staff of 37 on Tulane's Uptown and Downtown New Orleans campuses.

Key responsibilities include providing strategic direction and leadership for the financial aid office, streamlining processes, fostering a collaborative team environment, and working closely with stakeholders across the university. The Associate Vice President will work closely with the Vice President of Enrollment Management and other senior leaders to align financial aid strategies with the university's enrollment goals. This role also involves significant data analysis and strategic planning to optimize the allocation of financial aid resources, ensuring that Tulane remains competitive and accessible to a diverse student body.

The ideal candidate will possess a strong background in financial aid operations, with at least seven years of experience in a college or university setting, including three years in a supervisory role. A master's degree is preferred, along with a deep understanding of federal Title IV aid regulations and excellent organizational, analytical, and communication skills. The ability to lead a team, manage complex projects, and navigate the cyclical demands of a financial aid office is essential. This role also requires a commitment to customer service and innovation, as well as the ability to work effectively with a wide range of stakeholders, including campus partners, students, parents, and external entities.

Tulane University offers a unique blend of top-tier research and high-quality undergraduate education. A private university that is closely linked to its hometown of New Orleans, the University is committed to fostering an inclusive community and advancing knowledge for the greater good. With an enrollment of over 14,000, Tulane offers 75 undergraduate programs and over 200 graduate and professional programs through nine schools and college.

To submit a nomination or express personal interest in this position, please see **Procedure for Candidacy** on page 13 of this leadership profile.

## Role of the Associate Vice President for Financial Aid

The Associate Vice President (AVP) is responsible for supervising and coordinating the comprehensive financial aid process for both undergraduate and graduate student populations, including those at the Downtown campus location. This role involves the development, implementation, and maintenance of financial aid services from federal, state, institutional, and private sources. The AVP's oversight extends to the online degree programs, addressing the financial aid needs of this growing student population. Additionally, the AVP will manage consulting partnerships and external vendors providing financial aid services.

As a thought leader in financial aid, the AVP will focus on creating high-quality, inclusive programs that support students from diverse backgrounds. This includes ensuring that all students, colleges, and community stakeholders have access to and are aware of available financial resources. The AVP will provide guidance on state and federal laws and regulations related to financial aid administration.

A key aspect of this role is the ability to work collaboratively and build strong relationships across the University. The AVP will represent the financial aid office within the institution, with peer institutions, professional organizations, and community partners. By fostering a culture of collaboration and open communication, the AVP will ensure that the financial aid office is a supportive and integral part of the university community. This collaborative approach will help streamline processes, improve service delivery, and enhance the overall student experience.



## Goals

- **Modernize Financial Aid Systems and Processes**

The next AVP will bring fresh and innovative ideas for modernizing the financial aid systems and processes at Tulane. A firm understanding of best practices that will improve efficiency, reduce manual work, and enhance service delivery to students will be an asset to the new leader. The next AVP will analyze financial data, including retention rates, graduation rates, and student debt levels, to assess the effectiveness of aid programs. This on-going analysis will identify recommendations to divisional and University leadership for improvement and to inform strategic decisions.



- **Establish Strong Relationships with Campus Partners**

The next AVP will be engaged across the university. It will be important to continue to elevate the visibility of the Office of Financial Aid and the scope of its work, building and maintaining strong and collaborative relationships across the campus. An ability to communicate up, down, and across the university organizational structure will be a considerable strength. It will also be essential for the AVP to create an open, transparent, and on-going dialogue with senior administrators, faculty and staff that will engender cooperation, trust and confidence.

- **Improve Communication and Financial Literacy Outreach**

Enhance existing communications to prospective and current students to strengthen awareness of financial aid programs and overall financial literacy.

- **Ensure a Continuance of Consistent Compliance and Strong Financial Stewardship**

The next AVP will ensure that the University's financial aid programs adhere to all legal requirements and maintain a thorough understanding of changing regulations to avoid compliance issues and to properly steward university resources. The AVP will proactively explore complex situations to ensure that compliance is maintained, and students are served to the very highest level allowed by university, state, and federal policy.

- **Inspire the Team and Align Resources for Growth**

The next AVP will be pivotal in guiding a skilled and committed financial aid team. They will assess organizational needs to strategically align personnel and resources, optimizing efficiency and supporting the University's enrollment objectives. Emphasizing the professional growth of staff, the AVP will uphold high standards while fostering healthy working relationships, open communication, and student-centered practices.

## Opportunities and Expectations for Leadership

The Associate Vice President for Financial Aid will report directly to Shawn Abbott, Vice President for Enrollment Management and have three direct reports comprised of three directors. This individual will be an integral and vital part of the University's financial aid leadership team.

In addition, the Associate Vice President for Financial Aid will be expected to:

- **Associate Vice President activities – 30%**

- Provide strategic direction and leadership for the financial aid office.
- Seek to streamline processes, develop, and direct staff, and increase the level of customer service.
- Create a strong sense of teamwork within the office.
- Increase the visibility of the University's financial aid operations both internally and externally.
- Build bridges between the financial aid office and other offices, such as the undergraduate admissions office and various graduate/professional admissions offices.
- Exhibit vision, creativity, and determination to build a strong and vibrant financial aid office environment.

- **Strategic Support activities – 15%**

- Research, analyze, develop strategies, and implement initiatives to help meet enrollment goals through the strategic allocation of financial aid.
- Determine financial awards for Title IV and Title VII programs.
- Collect and analyze data, develop strategies, and make recommendations for allocating financial aid resources.
- Keep abreast of new ideas and developments and will make recommendations of policy for use of aid under Tulane's control.
- Provide reports to senior management and respective deans regarding operations and processing.
- Provide models for projection and monitoring on a regular basis.
- Attend meetings, call meetings, or develop communications to propose new issues, identify problems, or address new regulatory requirements.
- Support enrollment goals of the institution by leveraging financial aid and maintaining the budget.

- **Leadership Support – 15%**

- Support, develop, and direct staff to meet goals and build on past success.
- Develop organizational structure, establish job responsibilities and workloads, assign tasks, and review results on a regular basis.

- **Regulatory Compliance Officer activities – 10%**

- Maintain federal regulatory compliance.
- Oversee review of communications from federal and state governments within two weeks of receipt and interpret and implement as required.
- Complete necessary applications for federal and state funding and fiscal operations report (including all Federal Title IV and Title VII aid programs) prior to specified deadline(s).

- **Technology Support activities – 10%**

- Manage the fiscal and material resources allocated to the office AND monitor the processing and maintenance of University's financial aid software system.
- Prepare departmental annual budget and determine allocation of funds for staff, supplies and equipment, and facilities.
- Monitor expenditures to assure a balance budget at the end of the fiscal year.

- Monitor material resources to assure adequate office operations.
  - Review the processing and maintenance of the University’s financial aid software systems to assure timely and effective processing of aid.
  - Serve as co-lead to TIS for identifying and initiating software upgrades, improvements, testing, and installation.
- **Consultant Liaison activities – 10%**
    - Serve as the lead contact with various financial aid consultants to assure that services rendered are in-line with the University’s mission and goals.
    - Monitor consulting activities to assure that the delivery of services meets all expectations and enhances the student experience.
    - Review consultant agreements/contracts and develop work schedules as needed.
    - Keep abreast of new ideas and developments and will make recommendations to enhance consulting operations and services related to the financial aid office.
- **Other activities – 5%**
    - Perform other duties as requested or required, whether or not specifically mentioned in this job description.
    - Exhibit a willingness to assume additional duties. Seeks the guidance of immediate supervisor prior to beginning an unfamiliar assignment.
- **NCAA Related activities – 5%**
    - Ensures that all Department of Athletics and University related activities operate in full compliance with university, conference, and NCAA rules and regulations. Attends and participates in scheduled compliance seminars and complies with all the Athletic Department’s efforts to monitor compliance with NCAA regulations. Seeks interpretations from the compliance staff before acting when necessary.
    - Reports potential rule violations immediately. Completes required compliance paperwork in a timely and efficient manner. Monitors all their areas and/or programs activities closely to maintain compliance with applicable rules and regulations.

## Professional Qualifications and Personal Qualities

### Required Education and Experience

#### Preferred:

- Master's degree with a minimum of ten (10) years of experience in financial aid, and five (5) years in a supervisory role.

#### Required:

- Bachelor's degree AND at least seven (7) years of experience in financial aid operations in a college or university, including three (3) years of supervisory experience.



### Required Knowledge, Skills, Abilities/Competencies

- Capable of mastering a wide range of state, federal, and institutional policies and guidelines, with detailed knowledge of federal Title IV aid regulations.
- Possession of strong organizational and analytical skills, with excellent attention to detail.
- Excellent verbal communication skills to effectively explain detailed and complex financial aid processes and deadlines.
- Outstanding interpersonal, supervisory, and project management skills.
- Extensive analytical and technology skills with the ability to quickly learn computer operations and perform detailed work accurately and efficiently.
- Strong knowledge of computer software and hardware, including installation and maintenance of financial aid software. Ability to convey technical information in a clear way.
- Proven customer service expertise and the ability to mentor staff in delivering high-quality service.
- Adaptable to manage various duties and projects year-round, accommodating the cyclical demands of a Financial Aid Office.
- Ability to work effectively with diverse constituencies, including students, parents, faculty, academic deans and administrators, guidance counselors, alumni, government representatives, banks, loan servicing agencies, and loan guarantee agencies.

## About Tulane University

### Overview

Tulane was established as a medical college in 1834 to eradicate yellow fever. It became Tulane University in 1884 and has since grown to become one of the leading research universities in the United States with 9 schools and 1 undergraduate college. Tulane is now one of just 71 members of the [Association of American Universities](#), an elite collection of highly ranked research institutions in North America.

Situated on the Gulf Coast of Louisiana, Tulane has two distinct campuses - one in idyllic Uptown, New Orleans, across from Audubon Park and the Mississippi River, and another in Downtown, New Orleans, adjacent to the city's Central Business District and historic French Quarter.

The University's Uptown campus is situated along majestic St. Charles Avenue and is home to a thriving residential population where the average student travels more than 500 miles to be a student at Tulane. Tulane is increasingly attracting first-generation college students and students from low-income backgrounds, both of which are enrolling at record-breaking numbers. They are attracted to Tulane for its unique student experience, geographic diversity, service-oriented culture, appreciation for the arts, and warm weather - all set against the backdrop of New Orleans.

Tulanians enjoy life in arguably the most unique city in the United States, with iconic architecture, [world-class food](#) and music scenes, endless festivals, a [great work-life balance](#), [urban walkability](#), and easy access to [beaches](#). From Mardi Gras and Jazz Fest to cheering for [Tulane's nationally competitive NCAA Division 1 sports](#), both Tulane and New Orleans offer an unrivaled setting to study, work, and live.





## Mission

Tulane's purpose is to create, communicate and conserve knowledge in order to enrich the capacity of individuals, organizations and communities to think, learn, act and lead with integrity and wisdom.

Tulane pursues this mission by cultivating an environment that focuses on learning and the generation of new knowledge; by expecting and rewarding teaching and research of extraordinarily high quality and impact; and by fostering community-building initiatives as well as scientific, cultural and social understanding that integrate with and strengthen learning and research. This mission is pursued in the context of the unique qualities of our location in New Orleans and our continual aspiration to be a truly distinctive international university.

## Values

### Leading for a Better Tomorrow

With confidence, courage and humility, students help lead the way to a better future. Tulane aims to advance society by boldly confronting global challenges and unleashing the opportunities and promise of tomorrow. This is part of their collective DNA, as reflected in their mission statement.

### Knowledge for Good

In the pursuit of knowledge for the greater good, Tulane prioritizes scholarship and research, discovery and a commitment to creating a more sustainable future for all. From the founding purpose of confronting yellow fever and other 19th century infectious diseases to addressing modern-day health threats such as COVID-19, environmental challenges and other global problems, Tulane has long been a hub of meaningful exploration and discovery. Tulane teaches their students to love knowledge both for its own sake and for the sake of using that knowledge to tackle the most pressing issues of our time.

### Unconventional Innovation

With ingenuity and a growth mindset, Tulane brings together bold and creative scholars, scientists and students who are committed to crossing, combining and redefining the boundaries that have separated fields and thwarted true innovation. Through their unique educational and research vision, Tulane employs unconventional innovation and outsized ambition to create uncommon results.

### Inclusive Community

An inclusive community supports an environment of equity, diversity, compassion, respect, and opportunity. Tulane strives to make a more supportive home for all, which requires an open-heart and willingness to learn from past mistakes to build a better tomorrow. Tulane creates living, learning, and work environments where active steps are taken wherever possible to reduce inequities experienced by our community members who are underrepresented and underserved. Tulane has a shared destiny, common humanity, and a better



future that can only be reached by working together. Diversity is a hallmark of a great university committed to creating a more equitable and inclusive future. This is the university Tulane aspires to be.

### Collaborative Engagement

Tulane is rooted in the idea that looking outwards leads to impactful, real-world solutions that make a difference in the lives of others. The contributions to society are evident in the lives that have been transformed and problems that have been solved. Tulane is driven by knowing all of the good they can accomplish with integrity, freedom of expression, partnership and engagement with their community, region and world.

### Inspiring Excellence

Tulane is purpose-driven and intentional in everything they do – from groundbreaking research, teaching and public service. The distinctive attitude, grit and passion inspires the commitment to excellence. As Tulane continues to grow and prepare the next generation of leaders, they task themselves to seek more, do more and be more.

### Academics

Tulane pairs the resources of a large research university with the benefits of a small liberal arts college. Small class sizes are the norm, and faculty members are both accessible and approachable.

The 8,285 full-time undergraduate students are able to choose from over 70 different majors and minors. By completing Tulane's [core curriculum](#), students are exposed to academic foundations in writing, foreign language, scientific inquiry, and cultural knowledge.

All students enter as undergraduates through the [Newcomb-Tulane Undergraduate College](#). Once a student selects a major, he or she becomes affiliated with one of **5 undergraduate schools**: [Architecture](#), [Business](#), [Liberal Arts](#), [Public Health](#), or [Science and Engineering](#). Students combine our [70+ majors](#) into unique double majors (even across schools), because all students remain part of the unified undergraduate college.

Tulane's 5,252 graduate students are housed in research-oriented graduate programs leading to PhD, MA, MFA, and MS degrees through the Schools of Architecture, Business, Law, Liberal Arts, Medicine, Professional Advancement, Public Health & Tropical Medicine, Science & Engineering, and Social Work. Professional degrees are available at both the master's and doctoral levels in the Schools of Architecture, Business, Law, Medicine, Public Health & Tropical Medicine, and Social Work. The [School of Professional Advancement](#), the university's continuing education division, sponsors a Master of Liberal Arts, a Master of Professional Studies, and a Master of Public Administration. Joint degrees are available in several fields.

## Leadership

### **Robin Forman, Senior Vice President for Academic Affairs and Provost Professor of Mathematics**



Robin Forman was appointed as the Senior Vice President for Academic Affairs and Provost at Tulane University on September 1, 2016. He previously served as dean of the Emory College of Arts and Sciences and the Asa Griggs Candler Professor of Mathematics at Emory University.

Robin began his academic career in 1986 at Rice University, rising to full professor in 1999 and chair of the mathematics department in 2002. In 2005 he became dean of undergraduates. He has also served as an instructor at MIT and as a visiting professor at the University of Burgundy, Harvard University and the Mathematical Research Institute.

As the Chief Academic Officer of the University, Robin oversees the appointment, advancement, and retention of faculty; the articulation and deployment of all academic and research programs; and the development of strategic plans to secure the University's enduring excellence in research and scholarship, artmaking and design, instruction and mentorship, professional service and leadership, and community engagement.

Robin received a B.A. and M.A. in mathematics from the University of Pennsylvania and a Ph.D. in mathematics from Harvard. His research, which has been funded by the National Science Foundation, the National Security Agency and the Defense Advanced Research Projects Agency, focuses on combinatorial methods in topology and geometry.

### **Shawn Abbott, Vice President for Enrollment Management and Dean of Admission**



Shawn Abbott is the Vice President for Enrollment Management & Dean of Admission at Tulane University.

Shawn started his career in higher education at a community college in the Boston area before transitioning to a position at Drexel University in Philadelphia. His first position in college admissions was at Boston University. He then served the admission office at Columbia University for nearly a decade before becoming Director of Admission at Stanford University from 2006-2010 and then Assistant Vice President & Dean of Admission at New York University from 2010 to 2018.

Before coming to Tulane, Shawn was the Vice Provost for Enrollment Management at Temple University in Philadelphia.

In addition to his work at Tulane, he serves as a consultant for the U.S. Department of State's Office of Overseas Schools, where he visits schools in the Middle East and North Africa, educating families and counselors on the admission and financial aid process at American colleges and universities.

He is a first-generation college student and is a graduate of the University of New Hampshire and the University of South Carolina. He also holds a Doctor of Education degree in Higher Education Administration with a focus in urban studies from Columbia University, where he studied the architectural, economic, and social impact of urban universities on American cities.

## Student Life

Tulane students enjoy a vibrant on-campus life, participating in our many student clubs and organizations. With New Orleans as a backdrop, Tulane students have countless opportunities for on and off campus engagement.

Tulane has more than 200 student-run [clubs and organizations](#) on campus, and the University puts special emphasis on [outside of the classroom learning experiences](#) that are central to our curriculum. With such a diverse offering of activities to choose from - club sports, Greek life, radio stations, performing arts organizations, student government, community service clubs, just to name a few - Tulane students are never bored.

Students describe the Tulane lifestyle in New Orleans as both [active](#) and comfortable; becoming a part of Tulane's campus community comes naturally, and it is never long before students start calling New Orleans home.



## New Orleans, Louisiana

A city in a class of its own, New Orleans offers endless opportunities for fun and entertainment, casting a global allure that brings more than 17 million visitors to the city a year. From its world-class [gastronomy](#) and eclectic [art scene](#) to its distinctive [architecture](#) and [neighborhoods](#), New Orleans is like no other city. Add in its jazzy soundtrack and tropical climate, this is a destination everyone can enjoy. With a population of 383,997 according to the 2020 U.S. census it is the most populous city in Louisiana and the French Louisiana region; third most populous city in the Deep South; and the twelfth-most populous city in the southeastern United States. Serving as a major port, New Orleans is considered an economic and commercial hub for the broader Gulf Coast region of the United States.



Essentially an island between the Mississippi River and Lake Pontchartrain, New Orleans is a city defined and shaped by waterways. Before the arrival of European colonists, the indigenous [Choctaw](#) people called the area of present-day New Orleans *Bulbancha*, which translates as "land of many tongues". Nicknamed the Crescent City because of its quarter-moon shape, New Orleans was isolated from the mainland for close to 250 years. Because of that isolation, the city was a hotbed of cultural innovation, distinctive developments

including [jazz](#), Creole cuisine, gospel music, [jazz funerals](#) and a sassy stew of cultures that are uniquely its own. Until the first major bridge was built linking the city to the mainland in 1958, New Orleans was dominated by more canals than Venice. Locals got around by boat and by hopping on one of the historic [streetcars](#) that traveled more than 200 miles of lines, including the infamous streetcar named Desire that ran along Desire Street.

New Orleans is world-renowned for its [distinctive music](#), [Creole cuisine](#), [unique dialects](#), and its annual celebrations and festivals, most notably [Mardi Gras](#). The historic heart of the city is the [French Quarter](#), known for its [French and Spanish Creole architecture](#) and vibrant [nightlife](#) along [Bourbon Street](#). The city has been described as the "most unique" in the United States, owing in large part to its cross-cultural and multilingual heritage.<sup>[14]</sup> Additionally, New Orleans has increasingly been known as "Hollywood South" due to its prominent role in the film industry and in pop culture.

For more information visit: <https://www.neworleans.com/>

## Procedure for Candidacy



All applications, nominations and inquiries are invited. Applications should include, as separate documents, a CV or resume and a letter of interest addressing the themes in this profile.

WittKieffer is assisting Tulane University in this search. For fullest consideration, candidate materials should be received January 3, 2025.

Application materials should be submitted using WittKieffer's [candidate portal](#).

Nominations and inquiries can be directed to:

Christy Pratt, Rob Springall, and Roxana Woudstra

[TulaneAVPFinAid@wittkieffer.com](mailto:TulaneAVPFinAid@wittkieffer.com)

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*This policy applies to all terms and conditions of employment, including recruiting, hiring, placement, promotion, termination, layoff, recall, transfer, leaves of absence, compensation, and training.*

# Organizational Chart

