



# Executive Vice President and Chief Financial Officer

## Leadership Profile

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## Executive Summary

[Case Western Reserve University](#), one of the nation's leading research universities, seeks an accomplished, collaborative, and forward-thinking leader to serve as Executive Vice President and Chief Financial Officer (EVP-CFO). The EVP-CFO directly reports to [President Eric W. Kaler](#) and is a member of the president's cabinet and council, both of which support the advancement of President Kaler's three strategic priorities: elevating academic excellence, expanding research, and enhancing community engagement and impact, with diversity, equity and inclusion embedded throughout each. In addition, strong partnership and collaboration between the EVP-CFO and the provost and executive vice president is critical.

Located in Cleveland, Ohio, Case Western Reserve University (CWRU) is among the country's leading independent private research institutions and a member of the Association of American Universities (AAU) since 1969. In the of fall 2023, the university enrolled a diverse student body of 6,186 undergraduate students and 6,080 graduate and professional students. It is ranked among the most prestigious institutions in the world for its academic, research, and commercial success. In 2024, the university was recognized by U.S. News & World Report as the #1 private university in Ohio, #53 among national universities in the United States, and was ranked #39 worldwide for the number of U.S. Utility Patents awarded by the U.S. Patent and Trademark Office. CWRU's 267-acre campus is located in the heart of Cleveland's University Circle, a square-mile urban district of cultural, medical, educational, religious, and social service institutions, and is just minutes from Cleveland's downtown.

The next EVP-CFO will join this world-class institution and vibrant community as it prepares for the celebration of its bicentennial in 2026, with the charge to maintain fiscal strength while ensuring CWRU realizes the highest aspirations for the future. The EVP-CFO has primary responsibility for the development and implementation of the university's annual operating budget of approximately \$1.434 billion, an endowment of \$2.261 billion, and annual research expenditures of \$554 million (FY 2023). The EVP-CFO also supports and staffs the board of trustees' finance, audit, and investment committees and is tasked with building upon the institution's reputation of being strategic and disciplined in advancing its strong financial foundation.

As an integral member of the university's leadership team, the EVP-CFO facilitates financial strength and sustainability, operational effectiveness, and the delivery of optimized services by providing strategic vision and direct leadership for a team of leaders in an array of functional units, including audit services, budget and financial planning, campus services, controller's office, endowment funds management, financial ERP systems, office of investments, student financial services, and the office of the treasurer.

While the new EVP-CFO must be an especially strong financial and operational leader and manager, the heart of this role lies at the strategic level as a collaborative partner and communicator within the university community. The successful candidate will be a thought leader who partners with the president and a strong senior leadership team to advance President Kaler's strategic priorities as well as the university's abiding commitment to diversity, equity and inclusion. These priorities and values will guide the university through today's challenging higher education environment into an even stronger future. The EVP-CFO will represent the university's commitment to the transformative power of education, promote equity and inclusion, and support an environment of belonging. They will also be a relationship-oriented and collaborative leader with strong interpersonal skills and self-awareness.

The successful candidate will be a skilled and deeply experienced professional who is adept at change management, with the ability to advocate for and bolster a suite of university services, motivate and inspire colleagues, and manage complex and intersecting priorities while maintaining forward momentum. The new EVP-CFO will bring a distinguished record of seasoned senior leadership in finance and administration and demonstrated accomplishments in developing and attaining strategic goals and objectives, preferably in higher education or a similarly complex organizational setting. The EVP-CFO will be a superb communicator with exceptional analytical skills who values collaboration with colleagues; understands and respects shared

governance; and advances an environment of inclusive decision-making, student success, and best practices. A demonstrated ability to work with diverse populations is required; an MBA, CPA, or other relevant advanced degree is strongly preferred.

To submit a nomination or express personal interest in this position, please see Procedure for Candidacy at the end of this document.

## Role of the Executive Vice President and Chief Financial Officer

The EVP-CFO is a critical leadership position within this esteemed research-intensive university and one that is deeply committed to developing the leaders and innovators of the future. This leader is a member of the president's cabinet and council and reports directly to President Kaler. The EVP-CFO plays a pivotal role in shaping the financial vision and operational effectiveness of the institution. This role requires a strategic mindset, financial acumen, and the ability to drive excellence across diverse university functions.

The EVP-CFO is expected to be innovative and entrepreneurial in the pursuit and development of strategies that fully optimize resources and further the university's overall academic, administrative, and strategic initiatives. EVP-CFO assures that the financial and services infrastructure of the institution is appropriate given the university's goals; employs an understanding of systems and the technological tools available to facilitate institutional effectiveness; focuses appropriately on the ever-increasing need to proactively improve the financial control environment; and provides clear communication that enables the entire university to optimally function.

The EVP-CFO will ensure that the financial systems of the institution are transparent, with a comprehensive reporting environment that can provide necessary data for effective decision-making and ensure effective use and understanding of this data throughout the institution.

The EVP-CFO provides leadership for a team across an array of functional units, including the following:

- [Audit Services](#)
- [Budget and Financial Planning](#)
- [Campus Services](#)
- [Controller's Office](#)
- [Endowment Funds Management](#)
- [Financial ERP Systems](#)
- [Office of Investments](#)
- [Student Financial Services](#)
- [Office of the Treasurer](#)

Reporting to and working closely with the EVP-CFO are the following direct reports:

- Vice President Campus Services
- Treasurer
- Chief Investment Officer
- Vice President Internal Audit
- Vice President Financial Planning
- Controller
- Executive Director for Student Financial Services
- Eleven business officers located in CWRU's schools and colleges who have dual reporting lines to their respective deans and the EVP-CFO

Additional responsibilities include but are not limited to the following:

**Financial Leadership and Vision:**

- Formulate and communicate a clear financial vision aligned with the university's strategic goals.
- Ensure integrity to financial principles and architecture.
- Oversee the university's financial health, sustainability, and resource allocation.
- Partner with the provost in the development of academic and research programs.

**Budgeting and Financial Planning:**

- Lead the development and execution of annual operating and capital budgets.
- Develop a financial planning model consistent with strategic initiatives.
- Collaborate with academic and administrative units to allocate resources effectively.
- Monitor budget performance and recommend adjustments as needed.
- Recommend the annual budget guidelines including the Endowment Spend Rate.
- Oversee the timely spending of endowment funds when restrictions are met.

**Financial Reporting and Compliance:**

- Ensure accurate and timely financial reporting.
- Maintain compliance with accounting standards, regulations, and policies.
- Present financial updates to governance boards and committees.
- Prepare and present financial reporting to the President's Cabinet, President's Council, BOT, faculty, and staff as appropriate.

**Treasury and Investment Management:**

- Design and implement debt and credit management strategies.
- Manage liquidity, cash flow, and investment strategies.
- Optimize financial resources while minimizing risk.
- Oversee relationships with external financial institutions.

**Operational Efficiency and Effectiveness:**

- Streamline operational processes across university units.
- Enhance efficiency in administrative functions.
- Collaborate with UTech, facilities, and other departments to improve overall operations.

**Campus Services:**

- Oversee procurement, strategic sourcing, distribution, and payment management.
- Oversee the profitable operation of Auxiliary Operations which include Student Housing, Dining, Parking, Bookstore, 1-2-1 Fitness, etc.
- Oversee the profitable operations of university venues such as the Maltz Performing Arts Center and the Tinkham Veale University Center.
- Oversee and negotiate contracts for auxiliary services, financial services, and plan operations including construction and renovation projects.
- Negotiate property acquisition and disposition.

**Controller's Office:**

- Complete the annual IRS 990 filing, independent audit, annual Uniform Guidance audit, and other required filings.
- Negotiate the Federal Fringe Rate and Indirect Cost Recovery Rate Proposals
- Oversee all accounting, finance, forecasting, budgeting, cost-benefit analysis, audit activities, property management, capital projects, contract and procurement analysis and negotiations, property acquisition, and debt financing and management.

**Enterprise Risk Management (ERM):**

- Oversee management and enhancement of ERM framework.
- Oversee the preparation and execution of the annual ERM and Internal Audit Workplan.
- Oversee the management of the University's Compliance Hotline.
- Oversee the Internal Audit function.

**Payroll:**

- Timely production of bi-weekly and monthly payrolls.
- Timely production of W-2's and all tax filings.

**ERP Platform (PeopleSoft):**

- Maintain and enhance the platform used for financials, human resources, and student information (PeopleSoft).

**Board of Trustees:**

- Staff the Audit, Finance, and Investment Committees.
- Present at BOT executive and full BOT meetings standing and ad hoc reports.
- Recommend and prepare BOT resolutions.

**Bursar Office and Student Financial Services:**

- Oversee the revenue cycle related to tuition and collection of revenue.
- Oversee the payment programs, insurance products, and services for student tuition and fees.
- Maintain compliance with federal regulations and various agencies.

**Investment and Endowment Fund Management:**

- Support the BOT Investment Committee.
- Develop asset allocation and investment policy statements for all funds.
- Select fiduciary, investment, and custodial services.
- Achieve desired return objective within risk parameters.
- Recommend changes to investment policy as the environment changes.
- Administer the university's investments, endowment spending, and other financial policies with emphasis on a strong stewardship of funds.

**Pension Management:**

- Oversee the fiduciary and investment activities for all pension assets.
- Prepare and file regulatory pension reports.
- Recommend changes to defined benefit and contribution plans to meet changing objectives.
- Engage professional firms (e.g., actuaries, accountants, auditors, fiduciaries, custodians, etc.) to meet best practices standards.

**Strategic Resource Allocation:**

- Engage in resource planning and allocation.
- Obtain new funding sources to support research, teaching, and infrastructure.
- Foster partnerships with related corporations and external stakeholders.

**Leadership and Team Management:**

- Lead a team of professionals in finance, operations, and related areas.
- Cultivate a collaborative and results-oriented culture.
- Represent the university in relevant forums and conferences.
- Support the Faculty Senate and its Finance Committee.
- Partner with relevant stakeholders in short and long-term strategic fiscal management planning and modelling.
- Recommend and implement changes to the university's model of fiscal management to align incentives to strategic objectives.
- Manage a dual report to all College Business Officers (CBOs) based in the College, each school, and UGEN division.



## Opportunities and Expectations for Leadership

The new EVP-CFO will join the university at a critical moment in its history as the institution prepares for the celebration of its bicentennial in 2026 and continues to advance President Kaler's three priorities—to elevate academic excellence, expand the research enterprise, and enhance community engagement and impact—with the charge to maintain fiscal stability while ensuring CWRU realizes the highest aspirations for the future. The successful candidate will be a thought leader who partners with the president and a strong cabinet team to advance President Kaler's strategic priorities as well as the university's abiding commitment to diversity, equity and inclusion. These priorities and values will guide the university through today's challenging higher education environment into an even stronger future.

The EVP-CFO will bring an understanding of a variety of budget models and the ability to translate and effectively communicate the implications of complex financial decisions to a diverse set of audiences. The EVP-CFO must be entrepreneurial and creative in seeking out new sources of revenue and external partnerships that reflect an understanding of and commitment to the university's overall strategic priorities and its mission.

Specifically, the new EVP-CFO will be asked to address and execute on the following critical and inter-related leadership themes during the first 18 to 24 months of their tenure. They are not listed in any particular order of significance:

### Serve as a strategic partner to President Kaler and institutional leaders

The evolving financial landscape in higher education presents new challenges and opportunities for CWRU. As such, the next EVP-CFO will be a key strategic partner to President Kaler, with the experience, vision, political acumen, and inclusive style to honor CWRU's successes and advance the university's priorities. The EVP-CFO will be adept at assessing and advising the president and his cabinet on financial risk as well as financial opportunities and strategic investments that will facilitate the achievement of university goals.

The EVP-CFO will be a highly valued university leader and an active participant in cabinet-level strategy discussions, decision-making, and direction-setting and have significant experience working with boards on organizational finance and business affairs activities. These collaborations will be enhanced by the EVP-CFO's experience with highly effective financial modeling tools and techniques that assist university constituents in visualizing and tracking progress on strategic measurements and outcomes.

The EVP-CFO will bring a history of collaboration and partnership with academic affairs colleagues rooted in a deep understanding of the academic mission as well as the nuanced differentiations between colleges and schools. The EVP-CFO will bring a demonstrated commitment to transparently intertwining financial discussions into academic and student success decision points as opposed to viewing them in isolation from one another. Through this work, the EVP-CFO will support the provost and the academic enterprise in their desire to push the academic envelope and serve as a partner in identifying the strategic resources needed to enact innovative and bold ideas.

### Maintain a stable and transparent budget process

Thanks to a strong financial base, prudent choices in budgeting, and disciplined fiscal practices, the university has maintained a strong financial position despite the fiscal challenges in higher education. As EVP-CFO, this leader has responsibility for maintaining and enhancing an environment in which campus-wide budgeting and reporting can be provided to all units, as well as ensuring the appropriate tools for support of these initiatives. The EVP-CFO will also offer tailored support to units in need of budgetary and financial strategy assistance to ensure their long-term contribution to the institution. The university needs its next EVP-CFO to be a leader who understands the strengths of a variety of budget models to continue to build upon the stable fiscal state of the institution and

elevate the budgeting process to ensure timely and collaborative budget projections in close partnership with university leaders.

### Engage university partners as a collaborative leader

While the new EVP-CFO must be an especially strong operational and financial leader and manager, the heart of this role lies at the strategic level and as a collaborative partner and communicator within the university community. The president, provost, and campus leadership will welcome a strong and collaborative partner to provide strategic thought and planning that is both agile and entrepreneurial as they guide CWRU's fiscal, administrative, and operational strategies.

As a key advisor, the EVP-CFO will be an active participant in cabinet-level strategy discussions, decision-making, and direction setting, and have significant experience leading organizational finance and business operations. These collaborations will be enhanced by the EVP-CFO's extensive experience with highly effective financial modeling tools and techniques as well as experience reviewing and streamlining operations. Critical to their success will be establishing a reputation for prioritizing transparency through frequent and authentic communication with all constituents.

### Devise and implement revenue enhancement options

CWRU's current stable financial context provides an opportunity for the new executive vice president to be prudent in thinking about how to contain costs, ensure balanced budgets, equitably allocate funds, and make thoughtful and data-informed strategic investments.

Institutional leadership and the campus community are deeply interested in cultivating other sources of revenue to more comprehensively meet the needs of both the university and its students. For example, CWRU operates in a truly unique organizational structure that intersects on almost a daily basis with many external partners such as Cleveland Clinic, University Hospitals, and MetroHealth, and it has opportunities to further develop relationships with external partners as well as donors to enhance and generate additional revenue streams. Additionally, the university secured a century bond in 2022 that has allowed for even greater strategic investment opportunities for the institution. The new EVP-CFO will bring creative thinking and negotiating skills to conversations around revenue enhancement and will be able to advise and support the president and senior leadership as they consider and advance these initiatives, which will be essential to CWRU's financial future.

### Support the advancement of growing research and philanthropy agendas

As the university's research portfolio continues to grow and evolve, facilities such as the new [Interdisciplinary Science and Engineering Building](#) are being added to the campus infrastructure. This building and a campus master plan refresh will enable the university to continue to modernize its campus. With an eye to additional research strategic investments such as top talent that will further propel the university in the top 100 research university ranks, the EVP-CFO will work closely with research and academic leadership to ensure the finance organization is providing necessary support.

The university's development team is eager to welcome an EVP-CFO who has a deep appreciation for the role that philanthropy can play in providing new revenue opportunities for the university. Additionally, the university's endowment currently sits at about \$2.2 billion, which the university would like to continue to grow to ensure a sustainable future. As such, the next EVP-CFO will offer savvy and entrepreneurial oversight of the endowment given their previous experience and oversight.

## Promote a culture of innovation and agility

As the landscape of research-intensive universities continues to evolve, so must the approach to addressing challenges and capitalizing on opportunities. The EVP-CFO will not only bring innovative ideas and creativity to the role but will also promote a culture of nimbleness and innovation throughout the university. As part of that effort, the EVP-CFO will work closely with leaders from every division to identify ways in which the university community can accomplish greater cohesion, leading to even more collaboration across the full range of stakeholders. The EVP-CFO will lead efforts to streamline and modernize operations which will also support higher levels of agility.

## Measures of Success for the Position

At an appropriate interval after joining CWRU, the following items will define success for the new EVP-CFO:

- The EVP-CFO has earned the trust and confidence of the president, the cabinet, board of trustees, academic leadership, faculty, staff, and institutional partners.
- A welcoming tone has been established by the EVP-CFO that invites collaboration and encourages members of the campus community to share in the responsibility for creating a vibrant campus and seamless learning environment.
- A vision for the division has been articulated and embraced by stakeholders across the university, which they find energizing.
- A strong collaborative relationship with all aspects of the campus community, including students, faculty, and staff, has been established, along with a reputation for close partnership with constituents in meeting their goals and transparent leadership.
- The new EVP-CFO is a visible and engaged member of the CWRU and Cleveland, OH communities.

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## Professional Qualifications and Personal Qualities

Case Western Reserve University seeks a forward-thinking, solution-oriented, and collaborative leader whose style builds trust within the campus community and across the myriad CWRU constituent groups and partners. The successful candidate will be a skilled and deeply experienced professional who is adept at change management, with the ability to advocate for and bolster a suite of university services, motivate and inspire colleagues, and manage complex and intersecting priorities while maintaining forward momentum. The EVP-CFO will have the ability to coalesce institutional priorities and achieve transformative results using appropriate technology and sophisticated data analysis to inform strategic decisions.

The new EVP-CFO will be a dynamic, confident, high-energy leader who demonstrates most, if not all, of the following professional qualifications and personal qualities:

- **Commitment to mission and values:** A deep resonance with and eagerness to embrace Case Western Reserve University's mission, vision, and values and possibilities of a CWRU education; demonstrated impact in enhancing diversity, equity, and inclusion; a strong understanding of faculty work and the role a EVP-CFO officer plays in supporting a balanced set of program offerings as well as strategic enrollment management efforts; and an eagerness to tie into the academic enterprise of the university with an understanding and appreciation of shared governance and the student experience.
- **Transformational reach:** A bold, optimistic approach to creative thinking, change management, and the possibilities for a university community that is working together for the greater good; an innovative mindset and an accompanying ability to galvanize new thinking in others; experience enacting and sustaining novel and innovative approaches to strategic financial and operational priorities; a champion of growing mutually beneficial partnerships with local entities and industry leaders, employers, and community organizations within and beyond Cleveland, OH as a means to diversifying institutional revenue streams; the ability to provide elevating leadership that enhances the workplace culture by developing equitable structures, policies, and pathways to help all members of the CWRU community reach their fullest potential, including a deep understanding of the inequities faced by all underserved communities and a demonstrated commitment to removing systems and structures that negatively impact underrepresented faculty, staff, and students.
- **Proven effectiveness and expertise in fiscal management and administrative and operational strategies:** Nuanced knowledge of and successful record of enacting the principles and practices of comprehensive, multi-year capital and operating budget development and implementation; significant professional experience managing the complex interplay of strategic goals, academic mission, tuition revenue and budget models; skillful use of a wide variety of financing techniques, financial forecasting and ratio analysis, business intelligence, policy analysis, data analysis, program evaluation and cost-benefit analysis; theoretical and practical knowledge and experience with investments, cash/treasury management, and capital markets; understanding of and experience with capital planning, construction, real estate development and facilities maintenance and renovation; and demonstrated skill providing sound, ethical financial guidance to university leaders.
- **Leadership skills:** A thoughtful, accessible and solution-oriented leader committed to making principle-based decisions with integrity and transparency; successful experience developing and advancing strategic plans; experience harnessing institutional research and data analytics to good effect; ability to advise and support academic affairs and other key university divisions to reduce academic and cost structure inefficiencies; demonstrated experience in supporting and advancing diversity and inclusion efforts across the institution and supporting the recruitment and retention initiatives of diverse faculty, staff, and students across the inclusion spectrum; ability to coalesce institutional priorities and achieve transformative results; an embrace of flexibility; a strong and informed commitment to collaboration, discussion, shared governance, and solutions; and the

capacity to serve as a key adviser and thought partner with the president, provost, and other senior leaders, with the attendant skills of a trusted and additive contributor to the overall leadership of the university.

- **Organizational capacity building:** Ability to inspire trust and build cooperative relationships across constituent groups using collaboration, transparency, and persuasion to guide decision-making and critical operations; demonstrated ability to motivate internal constituencies by cultivating an empowered, collegial culture; a record of building an organizational culture that engages internal and external stakeholders to work toward a common purpose and achieve shared goals; respect, support for and eagerness to engage with and cultivate an accomplished faculty, staff, student and alumni community; success attracting and retaining exceptional talent; and the capacity to serve as a trusted, adaptive, and additive contributor to university leadership.
- **Exceptional analytical and technological skills:** The data savvy and direct experience necessary to utilize appropriate technology and tools to model sophisticated short- and long-term financial scenarios to inform strategic decisions and the assessment of opportunities and challenges; ability to produce forward-looking, transparent budgets and plans, linking expenditures to outcomes; analytical capacity to assess the effectiveness of how funds are employed to achieve university goals; sophisticated understanding of the value of technological innovations and investments that can be leveraged for more efficient and effective university processes and services; and deft skill synthesizing complex financial information for nonfinancial stakeholders.
- **Strategic Vision:** Fluency with current issues, financial challenges, and societal trends facing higher education institutions including state, federal, and international dynamics, and the ability to anticipate and capitalize on rapid changes in the global and domestic higher education space; the ability to think entrepreneurially and to galvanize others around a shared strategic fiscal vision, engaging others in its creation and implementation; the ability to develop and direct strategic initiatives that are simultaneously forward thinking and make the university nimble; and a willingness to be creative to explore new opportunities and meet emerging challenges without losing sight of mission.
- **Communication skills:** Exceptional communication skills rooted in transparency and honesty, including listening and working collaboratively with senior university leadership, the College and schools, partners across the university, alumni, donors, and community and industry partners; the ability to present a vision and other information effectively, synthesizing complex financial information for non-financial constituents; the ability to respond to questions from internal and external audiences with grace and finesse, both orally and in writing; the capacity to formulate, articulate and galvanize a wide range of audiences around a shared vision, guiding decision making and critical operations; and a style of engagement that builds mutual trust and respect.
- **Management skills:** Demonstrated success in managing strategically, decisively, and empathetically across complex environments, groups, programs and operations; experience in business process re-engineering with the ability to review and realign systems, policies, people, and culture to improve service delivery, communications, and productivity; a strong track record of leading change; the ability to inspire and effectively supervise others, plan and organize work, partner with colleagues across the university, and make decisions aligned with CWRU's strategic priorities.
- **Personal qualities:** A demonstrated confidence and ability as a nimble senior leader with the humility to be an effective part of a collaborative and collegial senior team; a lack of ego and self-promotion together with the desire to partner with others in service of the strongest possible effort; comfort and skill to pivot and move quickly in a dynamic environment; the ability to listen and hear ideas and thoughts from a variety of interested parties and partners and to integrate the thinking and views of others into one's own; high levels of emotional

intelligence and political acumen coupled with strong negotiation skills; integrity and trustworthiness; flexibility and resilience; optimism; courage; empathy and compassion; and a sense of humor.

- **Credentials:** An earned master's degree in finance, accounting, or business administration or a relevant advanced degree is desired along with progressively responsible experience in senior positions overseeing the finance and administrative operations of a complex organization. Experience as a financial/administrative leader in a complex higher education research university with a medical school is preferred. Experience managing enterprise resource planning systems, experience with funding principles and models as well as experience working closely with a board of trustees is preferred.

## About Case Western Reserve University

### Overview

CWRU is an independent private research university located in Cleveland, Ohio. CWRU holds membership in the Association of American Universities (AAU), is fully accredited by the Higher Learning Commission and by several nationally recognized professional accrediting associations. CWRU is ranked #53 in the 2024 edition of Best Colleges and National Universities by US News and World Report. Nationally, CWRU is ranked 19th in the world for innovation and 13th for translating research into commercial success. CWRU had \$554 million in research expenditures in fiscal year 2023.

CWRU's 267-acre campus is located in the heart of Cleveland's University Circle, a square-mile urban district of cultural, medical, educational, religious, and social service institutions, and is just minutes from Cleveland's downtown.

The campus is within walking distance of outstanding destinations such as: Severance Hall, home of the world-famous Cleveland Orchestra; Cleveland Museum of Art, housing one of the nation's finest collections; Cleveland Institute of Music; Cleveland Institute of Art; Western Reserve Historical Society; Cleveland Botanical Garden; and Cleveland Museum of Natural History, among others.

CWRU comprises the College of Arts and Sciences and seven schools – the Case School of Engineering, the Frances Payne Bolton School of Nursing, the Jack, Joseph and Morton Mandel School of Applied Social Sciences, the School of Dental Medicine, the School of Law, the School of Medicine, and the Weatherhead School of Management.

Fundraising for scholarships has been a priority for the university since January 2019, following the end of its Forward Thinking campaign. Since then, the university has raised more than \$215 million of its \$250 million goal toward scholarships. Impressively, the annual attainment average during the post-campaign is higher today than it was during the public phase of the Forward Thinking campaign. The university also has raised nearly \$93 million since it began fundraising in July 2022 for the planned Interdisciplinary Science and Engineering Building. The amount far exceeded the original goal to raise \$80 million by the building's groundbreaking in October 2024. Fiscal Year 23 was the second highest attainment in CWRU's history and Fiscal Year 24 is on track to raise even more.

In fall 2023, CWRU had an enrollment of 6,186 undergraduate students and 6,080 graduate and professional students. The university boasts a substantial alumni network, with more than 125,000 members located worldwide. The total faculty at CWRU comprises 1,158 full-time faculty members and 3,047 full-time and part-time staff members.

### Mission

CWRU improves and enriches people's lives through research that capitalizes on the power of collaboration, and education that dramatically engages students.

The university realizes this goal through:

- Scholarship and creative endeavor that draws on all forms of inquiry.
- Learning that is active, creative, and continuous.
- Promotion of an inclusive culture of global citizenship.

## Vision

CWRU aims to be recognized internationally as an institution that imagines and influences the future. Toward that end, the university will:

- Support the advancement of thriving disciplines, as well as new areas of interdisciplinary excellence.
- Provide students with the knowledge, skills, and experiences necessary to become leaders in a world characterized by rapid change and increasing interdependence.
- Nurture a community of exceptional scholars who are cooperative and collegial, functioning in an atmosphere distinguished by support, mentoring, and inclusion.
- Pursue distinctive opportunities to build on CWRU's special features, including relationships with world-class health care, cultural, educational, and scientific institutions in University Circle and across greater Cleveland.



## Core Values

### Academic Excellence and Impact

- Eminence in teaching and research
- Scholarship that changes lives and deepens understanding
- Creativity and innovation as hallmarks of CWRU's efforts

### Inclusiveness and Diversity

- Civility and the free exchange of ideas
- Civic and international engagement
- Appreciation for the distinct perspectives and talents of each individual

### Integrity and Transparency

- Academic freedom and responsibility
- Ethical behavior
- Shared governance

### Effective Stewardship

- Strong, ongoing financial planning
- Emphasis on sustainability
- Systems that support the attainment of CWRU's mission



## Academics

At Case Western Reserve University, learning and discovery are central to the institution's mission. The university boasts over 100 undergraduate programs, as well as approximately 160 graduate and professional programs and more than 145 dual-degree programs. Additionally, students can choose to enroll in one of seven online master's degree programs or over a dozen non-credit online courses.

Case Western Reserve University's programs span a wide range of fields, including arts, sciences, engineering, law, management, medicine, nursing, dentistry, and social work. These programs are designed to prepare students to make a significant impact in their chosen fields.

### College and Schools

- [Case School of Engineering](#)
- [College of Arts and Sciences](#)
- [Frances Payne Bolton School of Nursing](#)
- [Jack, Joseph and Morton Mandel School of Applied Social Sciences](#)
- [School of Dental Medicine](#)
- [School of Law](#)
- [School of Medicine](#)
- [Weatherhead School of Management](#)



### Links to Additional Information

- [Office of the President](#)
- [President Eric W. Kaler](#)
- [Board of Trustees](#)
- [Provost Joy K. Ward](#)
- [Faculty and Staff Composition and Trends](#)
- [Institutional Accreditation](#)

## Leadership

### Eric W. Kaler, PhD, President



Eric W. Kaler became president of Case Western Reserve University on July 1, 2021. Previously, he served as university president at the University of Minnesota for eight years. Since joining Case Western Reserve, Kaler's focus has been on growing and improving the undergraduate program, building research productivity, and connecting to the university community.

An accomplished chemical engineer and visionary university leader, Kaler's career in higher education spans more than 40 years. He has significant expertise in elevating research, expanding fundraising, forming collaborative partnerships, encouraging entrepreneurship, and advocating for diversity, equity, and inclusion.

Kaler holds 10 patents and has published more than 200 peer-reviewed papers. Currently, he serves as a member of the National Institute of Standards and Technology's Visiting Committee on Advanced Technology. He also serves on the Board of Directors of the Greater Cleveland Partnership, where he also co-chairs the Innovation and Growth Committee. In addition to election to the National Academy of Engineering and the American Academy of Arts and Sciences, Kaler is a fellow of the American Association for the Advancement of Science, the American Chemical Society, and the Neutron Scattering Society of America. He was a member of the inaugural class of the National Academy of Inventors.

Born in Vermont, Kaler is a first-generation college graduate who earned his bachelor's degree in chemical engineering from the California Institute of Technology and his PhD in chemical engineering from the University of Minnesota.

## The Community

### Cleveland, Ohio

Ranked as one of the country's most livable cities—and especially a great place for young professionals—Cleveland is a mid-sized city that gets high marks for its:

- Thriving healthcare and biotechnology industries
- Lively arts and cultural scene
- Low cost of living
- Four-seasons climate
- Wealth of natural resources



Cleveland often is hailed in the press as an exceptional dining city, and it has long been renowned for its arts scenes in neighborhoods such as Tremont,

Ohio City/Hingetown, and Collinwood. From the theater at Karamu House and indie concerts at the Beachland Ballroom to The Cleveland International Film Festival, Friday-night polka-rock in Gordon Square and Saturday-morning shopping at the West Side Market, to walks and hikes in the Cleveland Metroparks, opportunities abound for a busy life. Moreover, CWRU is just a short bus ride from Playhouse Square, the country's largest performing arts center outside of New York City.

Want to cheer on a team in the stands rather than catch a show? The Cleveland Cavaliers basketball team, Cleveland Browns football team, and Cleveland Guardians baseball team all play in venues downtown. In addition, each year during commencement, graduates and their families can see the Cleveland Marathon racing through the city.

### University Circle

Just minutes away from downtown, University Circle comprises 550 park-like acres in a vibrant urban environment. CWRU's campus is just a short walk to some of Cleveland and University Circle's most outstanding destinations:



- [Cleveland Orchestra at Severance Hall](#)
- [Cleveland Museum of Art](#)
- [Cleveland Botanical Garden](#)
- [Museum of Contemporary Art Cleveland](#)
- [Cleveland Museum of Natural History](#)

For more information about Cleveland, visit <http://case.edu/about/cleveland.html>

## Procedure for Candidacy

WittKieffer is assisting Case Western Reserve University in this search. For fullest consideration, candidate materials should be received by September 15, 2024. However, candidates will be considered until an appointment has been made.

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.

Nominations, inquiries, and application materials can be directed to:

Jim King III, Jen Meyers Pickard, Ph.D., Sarah Palmer

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

*Case Western Reserve University strives to maintain a diverse and inclusive work environment. All applicants are protected under Federal law from discrimination based on race, color, religion, sex, national origin, disability, age and genetics.*

*Case Western Reserve provides reasonable accommodations to applicants with disabilities. Applicants requiring a reasonable accommodation for any part of the application and hiring process should contact the Office of Equity by phone at 216.368.3066 or by email at [equity@case.edu](mailto:equity@case.edu). Determinations as to granting reasonable accommodations for any applicant will be made on a case-by-case basis.*

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