



POSITION PROFILE
Vice President for
Finance and Administration
August 2024



ABOUT SOUTHERN OREGON UNIVERSITY

Established in 1872, Southern Oregon University (SOU) is becoming the ‘University for the Future’, under the direction of President Dr. Richard J. Bailey, Jr., who inspires the community to strive for greatness – individually and collectively. SOU provides career-focused, comprehensive educational experiences to over 5,000 students with multiple degree path options through 46 undergraduate and 10 graduate-level academic programs in a dynamic range of fields while preparing them to live and lead in a multicultural, global society. Along with an emphasis on student success and intellectual growth, SOU is committed to diversity, equity inclusion, and sustainability. Theoretical and experiential learning programs provide quality, innovative experiences for learners. At SOU, students build strong community connections through internships, mentorships, field studies, capstone projects, volunteer opportunities, and civic engagement. To learn more: <https://sou.edu/>

Student leadership is an important part of what makes SOU a wonderful place to live and study. With staff and faculty support, students at SOU can step into their own leadership and learn to manage and operate a wide range of student resources including outdoor adventure programming, film screenings, community gardens, bicycle services, and an organic farm.

Sitting on 175 acres, Southern Oregon University is committed to sustainable practices, environmental stewardship, and research that advances understanding of local, regional, and global environmental issues of which it has been nationally recognized. Recently, SOU was honored with the *Best Case Study Award* by the Association for the Advancement of Sustainability in Higher Education, was the first university in the nation to certify as a *Bee Campus USA*, and now boasts LEED Gold campus housing.

Over the past 4 years, SOU has strengthened its strategic approaches to enrollment management in alignment with the university’s vision and mission. Through a thoughtful, collaborative, shared governance process, SOU has developed innovative initiatives in the areas of student success and retention, financial aid, academic program planning, and recruitment and marketing.

In September of 2022, Southern Oregon University announced the single largest philanthropic gift in its history. A ten-year, \$12 million+ commitment from [Lithia Motors](#) (NYSE: LAD) creates numerous opportunities “to propel the university forward by investing in people and programs to implement the university’s and the company’s shared vision of sustainability and diversity.” Lithia’s commitment follows several consecutive years of record-breaking philanthropic investment by university donors. Giving to the university has increased more than 750% during the last ten years.

SOU’s presence is experienced not only in Ashland but also in Medford, Oregon at the Higher Education Center where students pursue two-year, four-year, and graduate degrees. At both locations, the passions of students combine seamlessly with an outstanding education in a unique location making SOU a wonderful place to work, live, and learn.

- *Sierra Magazine* ranked SOU one of the top “Cool Schools” in the US
- *The Princeton Review* named SOU one of the most environmentally responsible colleges in the US and Canada
- SOU was awarded 5 out of 5 stars on the Campus Pride Index in 2023
- *Outside Magazine* named SOU one of the top 20 schools in the US where you can hit the books and the back country
- SOU participates in Second Nature’s Climate Commitment
- SOU is a proud member of the [Age-Friendly University Global Network \(AFUGN\)](#)



Building the Future

Under the leadership of President Rick Bailey, the campus community came together two years ago to craft a thoughtful and inclusive planning process to secure a successful and sustainable future for the university. The SOU Board of Trustees voted unanimously in April 2023 to adopt the [SOU Forward](#) fiscal realignment plan – a four-plank strategy that balances expenses with revenue and then prepares the university for strategic growth by diversifying its sources of revenue.

The first element of the four-plank SOU Forward realignment strategy resolved the structural deficit in SOU’s financial model by eliminating \$9 million in recurring costs. Three other planks are in various stages of implementation and include reimagining how the university supports faculty and programs seeking funding from external granting agencies and organizations, leveraging the ongoing surge in philanthropic support, and diversifying revenue by pursuing entrepreneurial opportunities – including solar power generation and creation of a senior living facility.

The realignment process, which began in earnest two years ago, has aimed for transparency and collaboration, with input from SOU’s shared governance partners – the Associated Students of SOU, Faculty Senate and Staff Assembly – and the unions representing both faculty and classified employees. With each decision, efforts have been made to maintain academic excellence and student experiences.

“Make no mistake, this continues to be a challenging process for all of us at SOU,” President Rick Bailey said. “But we will remain committed to kindness, compassion and unity. We are in this together, and will always be mindful of the ways in which this plan affects all of our students, faculty and staff.”

The next VPFA will help to build on the culture of opportunity that resulted from overcoming these past challenges by embracing an entrepreneurial spirit, ensuring transparency in budget and finance operations, and by providing a sound fiscal accountability moving forward.

SOU Finance and Administration

Finance and Administration oversees a broad range of campus operations and works closely with the university President on policy and operational issues. The Finance and Administration portfolio includes oversight of the following SOU departments: Business Services, Budget and Planning, Contracts and Risk Management, Human Resources, Facilities Management and Planning, Campus Public Safety, Information Technology, and Sustainability.

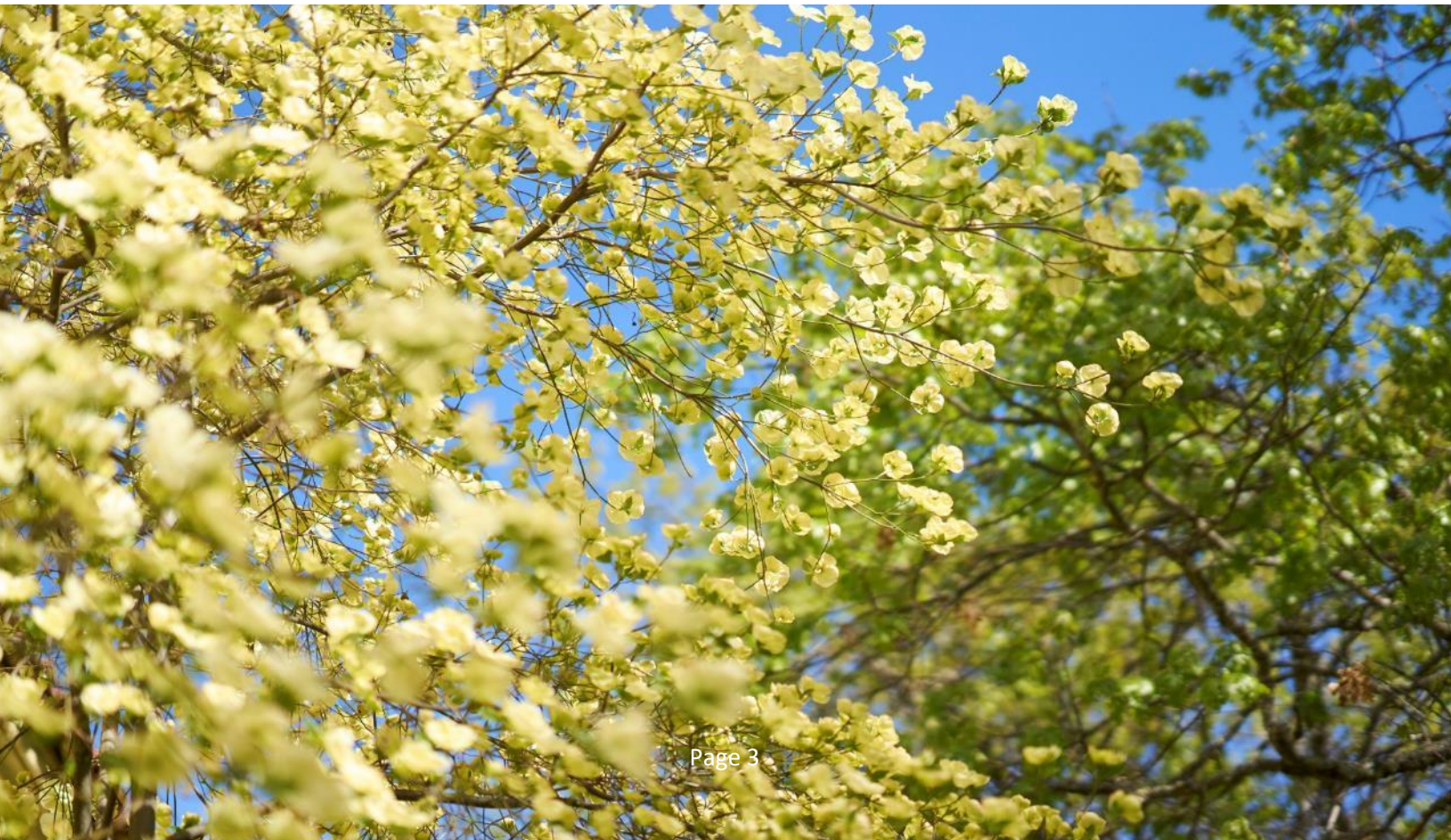
A Pioneer in Sustainable Campus Energy

Southern Oregon University is taking big strides toward becoming the first public university in the U.S. to produce all of the daytime electricity used on its campus, with a \$1.56 million contract signed in September 2023 to install new solar arrays and a battery storage facility, and on-site construction work set to begin this winter.

The new installations on Lithia Motors Pavilion and The Hawk Dining Commons will increase SOU's photovoltaic output by 86 percent – from the current 455 kilowatts to a total of 848 kilowatts. The two new solar facilities, combined with nine existing arrays, will enable the university to generate just over 12 percent of the electricity it uses. The contract with Ashland's True South Solar also includes a battery storage bank that will be built adjacent to The Hawk, enabling SOU to support community resilience by providing power in The Hawk, if needed, in the event of an emergency.

The university anticipates generating 100 percent of its own electricity by 2033, and is already planning subsequent rounds of solar expansion. The first of several SOU arrays to be built on parking lot structures in 2025 will add 340 kilowatts of generating capacity and bring the university to nearly 17 percent of its overall electricity usage. Solar energy production is one of the initiatives that SOU is currently pursuing in its effort to be more entrepreneurial in its approach to revenue generation. Achieving the energy-independence goal will also contribute to a reduction in SOU's greenhouse gas emissions.

SOU currently has nine solar arrays on campus, plus an array at the Higher Education Center in Medford and a pole-mounted array installed last year by a nonprofit on land leased from the university. SOU has added five arrays over the past three years, with funding by private investors, grants, the student government and university administration. SOU will continue to implement energy conservation and energy efficiency measures as it increases its solar power production.



SOU Leadership



President Richard J. Bailey, Jr., joined SOU in January 2022, after overseeing the resurgence of Northern New Mexico College during five-plus years as president. He previously completed a 24-year career in the U.S. Air Force, retiring as a full colonel and command pilot with more than 3,500 flying hours.

Dr. Bailey earned accolades on and off campus while at Northern New Mexico College, increasing enrollment by more than 20 percent, cutting student loan defaults by more than 50 percent and more than doubling the college's graduation rate – all without an increase in tuition rates.

He also brokered an NNMC partnership for the construction of a 1.5 megawatt solar array to lower utility costs for at least 30 years. He led the creation of the Northern New Mexico College Eagle Corporation – the college's first such venture – allowing the institution to partner with business entities for the purpose of diversifying the college's revenue streams.

Since arriving at SOU, President Bailey has earned the respect and trust of the Ashland community, Oregon higher education leaders, and SOU students, faculty, and staff through his transparent, inclusive, and steady approach. Bailey has established a reputation of listening deeply and connecting regularly with SOU constituents via multiple venues, including [monthly video messages](#) and student-hosted podcasts.

Executive Leadership Team



Dr. Peter Angstadt - Interim Vice President for Finance and Administration

Peter currently serves as chair of the Asante Board of Directors and has served on many local community boards. He has also served as president of Rogue Community College, Colorado Northwestern Community College, the chief financial officer and Dean of College Services at Clackamas Community College, and was elected to two terms (1990-98) as the full-time mayor of Pocatello, Idaho. He holds a bachelor's degree in zoology from Colorado State University and two master's degrees: an M.Ed. in higher education administration from CSU and an MBA from Idaho State University. He earned his doctorate in educational policy and management from the University of Oregon.



Janet Fratella - Vice President of University Advancement and Executive Director, SOU Foundation

Janet joined SOU in 2015 and has nearly thirty years' experience in university advancement. She provides leadership and oversight of the university's development and alumni relations programs, marketing and communication, media and community relations, grants and sponsored projects, Osher Lifelong Learning Institute, and serves as the Executive Director of the SOU Foundation, the university's affiliated non-profit foundation. Janet holds two master's degrees: an M.S. in higher education administration and an M.P.A. in Public Administration, both from the University of Oregon. Janet is also serving as Chair of the VPFA Search Committee.



Dr. Casey Shillam - Provost & Vice President Academic and Student Affairs

Casey Shillam, Ph.D., R.N., F.A.A.N., joined SOU in Spring 2024. Casey's educational background is rooted in healthcare. She is an experienced academic leader, nurse, educator, administrator and U.S. military veteran. Casey earned master's and doctoral degrees in nursing from OHSU and specializes in aging and geriatric care. Casey's work on aging and health policy has made significant impacts regionally and nationally. In Oregon, she shaped legislation through the House Committee on Health Care to address the healthcare workforce shortage. At the federal level, she co-chaired the Department of Health & Human Services RAISE Family Caregiving Advisory Council.

THE OPPORTUNITY

Vice President for Finance and Administration

Position Summary

The Vice President for Finance and Administration (VPFA) is the chief fiscal officer, responsible for the university's overall financial leadership, strategic planning, and financial management. The VPFA also guides the development and implementation of the university's human, financial, and physical resources, which include the budget office, human resource services, facilities management and planning, campus master planning and new construction, information technology, campus public safety, service center, business services, and sustainability.

The VPFA will partner with the President and other key stakeholders to leverage SOU's unique strengths, develop and execute innovative plans for resource diversification, and forge new pathways to secure a sustainable future for the university. The VPFA guides the development, implementation, and monitoring of SOU's operating and capital budgets, from multiple sources of funding (general funds, auxiliary enterprises, self-support operations, private donations, and legislative capital funding). The position reports directly to the President and serves as a critical member of the executive team. The Vice President plays key roles in institutional planning and positioning, in building community partnerships, and in advancing SOU's presence in the region, state, and nation. The Vice President has a significant role in representing SOU to the Southern Oregon University Board of Trustees, and participates in the Oregon VPFA Council, the Oregon Council of Presidents, Public University Risk Management and Insurance Trust (PURMIT), and related agencies and organizations.

Effective performance of the duties outlined below requires an in-depth understanding of the mission of the institution and its various programs, a commitment to service through the various logistical and support functions, and the ability to work effectively within a shared decision-making environment.



Key Responsibilities:

- **Budget and Fiscal Management (35%)**

Working in partnership with the President and executive leadership team, the VPFA will lead efforts to leverage SOU's unique strengths, develop and execute innovative plans for resource diversification, and propose new pathways to secure a sustainable future for the university. The VPFA plays a pivotal role in guiding and coordinating the institution's operating budget, which includes both state appropriations and tuition/fee revenues, along with the expenditures sustained by these and other funding sources. In a similar capacity, the VPFA oversees the budgeting and expenditure control for auxiliary funds, such as those from auxiliary enterprises and self-support operations. The VPFA's duties also encompass supervising and coordinating the critical tasks of forecasting, financial analysis, and institutional fiscal research. These functions are essential for shaping and assessing annual and biennial budget requests to the Board of Trustees and the Higher Education Coordinating Commission (HECC), including the setting of tuition/fee levels and campus resource allocations. The VPFA ensures that these processes are appropriately carried out, documented, implemented, and reported on. Further, the VPFA oversees all accounting, reporting, and fiscal control activities. This includes working with internal and external auditors to ensure ethical business practices, compliance, and accurate financial statement preparation and reporting. The VPFA maintains a financial link with the university and the SOU Foundation (SOUF), Jefferson Public Radio (JPR), Campus Housing Foundation (CHF), and Barnes & Noble (B&N).

- **Oversight of Campus Service Areas (30%)**

The VPFA oversees the following areas and processes in collaboration with direct reports: capital asset management and overall campus infrastructure at SOU's Ashland and Medford campuses, planning and institutional capital budget requests, architectural and construction contracts, planning and implementation of institution-wide safety and security measures and crisis management, sustainability, and information technology.

- **Campus Leadership (20%)**

The Vice President has a significant role in representing SOU to the Southern Oregon University Board of Trustees, and participates in the Oregon VPFA Council, the Oregon Council of Presidents (OCOP), the state legislature, and the Public University Risk Management and Insurance Trust (PURMIT). The VPFA serves as the principal representative to organizations such as the National Association of College and University Business Officers (NACUBO) and its Western affiliate (WACUBO) and the College and University Personnel Association (CUPA). The VPFA also participates on various internal task forces, work groups, and steering committees charged with developing or evaluating administrative and financial activities, including but not limited to Cabinet, Executive Council, Business Affairs Council, University Budget Committee, and Tuition Advisory Council.

- **Human Capital & Collective Bargaining Administration (10%)**

The VPFA guides the university's human resource policies and processes regarding recruitment and retention practices, benefits, performance management, professional development, employee and labor relations, and compensation plans for administrative, classified, and student employees. The VPFA assists in collective bargaining agreements with the Association of Professors of SOU (APSOU) and the Service Employees International Union (SEIU) Local 503 union.

- **Institutional Policy and Accountability (5%)**

The VPFA is involved in developing, implementing, revising, and integrating institutional finance and administrative policies, subject to approval by the President and Board of Trustees. They collaborate with the University Policy Committee and other Vice Presidents to develop, review, and approve SOU finance and administrative policies, rules, and regulations. The VPFA assists the President and senior officers in complying with institutional and Board policies, as well as applicable laws and rules.

Minimum Qualifications:

- Master's degree from an accredited institution of higher education or equivalent senior-level leadership experience.
- At least five years of successful leadership in a senior-level position with significant financial responsibility, budget program experience, and personnel management.
- Demonstrated capacity to analyze organizational financial strengths and weaknesses and develop and implement strategic opportunities.
- Demonstrated proficiency communicating across multiple audiences with clarity, equanimity, and integrity.
- Record of successful approaches to supervision and team leadership that prioritizes trust, healthy communication, strong relationships, accountability, and skillful conflict management.
- Experience integrating short and long-term financial and strategic planning, and knowledge of best practices in fiscal, budgetary programs, and other functions.
- Evidence of strong organizational and analytical skills; familiarity with systems-thinking.
- Demonstrated ability to analyze and interpret data and communicate this to a broad set of audiences.
- Demonstrated ability to lead effective change with an entrepreneurial spirit.
- Proven record of a commitment to equity, diversity, and inclusion initiatives, and experience with organizational EDI goals and efforts.

Preferred Qualifications:

- Executive leadership in higher education administration, finance, budget management. Experience leading multiple dimensions of operations is a plus.
- Demonstrated effectiveness working with shared governance structures.
- Demonstrated knowledge of multiple budget models, in both public and private settings.
- Experience with organizational change management.
- Record of cultivating successful working relationships with governing boards.
- Experience working under collective bargaining agreements.
- Certified Public Accountant designation.



Commitment to Service Excellence:

- **Works Collaboratively.** Cultivates connections with others that contribute positively to the well-being of those involved. Works toward a common objective through the sharing of ideas and distribution of responsibilities across team members. Strong interpersonal skills including collaboration, professionalism and strong consultative skills conducive to building and maintaining positive relations with administrators, co-workers, staff, faculty, union representatives and other members of the campus community.
- **Growth Mindset.** Demonstrates consistent resiliency to promote positive change through adversity. Identifies potential change opportunities and actively seeks to adapt. Assesses and utilizes creative strategies to create individual, organizational, or societal change within a situational context.
- **Initiative and Follow Through.** Takes initiative to identify and assess needs to create measurable objectives, and builds relationships with people who will be able to help achieve those objectives. Demonstrated ability to meet deadlines, anticipate needs, prioritize multiple tasks, follow through, and work independently without supervision while handling frequent interruptions and rapidly shifting priorities. Skilled at keeping detailed records and following up on various issues. Skilled at streamlining processes to create efficiencies when necessary. Strong leadership skills including problem solving, analytical and project management.
- **Demonstrated Service Excellence.**
 - **Teamwork.** Demonstrated ability to work effectively as a team player; coordinate several functions and determine the relative importance of each; ability to work with a high level of productivity and accuracy/attention to detail.
 - **Knowledge.** Advanced computer skills and proficiency with a variety of computer applications including word-processing, spreadsheets, databases, online systems, social media platforms, internet as well as online calendaring and email. Demonstrated office operations or project management experience.
 - **Accountability.** Demonstrated ability to interpret and consistently apply a wide variety of complex policies and procedures where specific guidelines may not always exist. Ability to work with frequent changes in policies and procedures, under pressure of deadlines in a fast-paced environment. Ability to manage stressful situations with tact and diplomacy and to use sound judgement and discretion, particularly as it relates to handling sensitive and/or confidential information.
 - **Professionalism.** Excellent organizational and time management skills with the ability to set own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines. Proven ability to handle a broad range of sensitive interpersonal situations effectively with a very high level of diplomacy and compassion.



PROCEDURE FOR CANDIDACY

Confidential review of applications will begin immediately and continue until the position is filled; **parties who apply by September 27, 2024 will be given first consideration.** Please submit a PDF version of your CV and cover letter outlining your interest and suitability for this position. To apply online, go to <https://theapplicantmanager.com/jobs?pos=su420>

For more information or to offer recommendations or nominations:

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Southern Oregon University is an equal employment opportunity employer and is strongly committed to achieving excellence through a diverse workforce. The University actively encourages applications of all qualified individuals.



[Summit Search Solutions, Inc.](https://www.summitsearchsolutions.com) is a boutique executive search firm dedicated to serving the education and nonprofit sectors nationwide. Based in Asheville, NC, Summit has a team of experienced recruiting consultants in strategic locations across the country including California, Colorado, Kansas, Maryland, New York, and North Carolina.



YOU'RE HOME



Selected as a top 10 finalist in Outside magazine's search for the "Best Town in America," Ashland is a culturally rich place for tourism, entertainment, entrepreneurship, and breathtaking outdoor experiences.

ASHLAND, MEDFORD, and SOUTHERN OREGON

Ashland is located on the land of the Shasta and Takelma peoples and recognizes the many Oregon and Northern Californian tribes and bands who call the Klamath Basin region their ancestral territory. Ashland is nestled at the base of the convergence of the Siskiyou and Cascade mountain ranges at an elevation of approximately 2,000 feet. Situated centrally between San Francisco and Portland, this city of over 20,000 people enjoys 200 days of sunshine each year, making it an ideal choice for anyone looking to settle in a mild climate for four distinct seasons. Established higher education core, vibrant tourism sector, and innovative small businesses form the base of Ashland's economy. Interstate 5 runs conveniently by Ashland making it easy to get to larger neighboring cities.

In Ashland is Lithia Park, a beguiling 93-acre green-space spread with lush lawns and elegant landscaping, walking paths, tennis courts, playgrounds, and picnic areas, set amid undeveloped woodlands, duck ponds and groves of sycamore trees which hosts the Oregon Shakespeare Festival, an Elizabethan Theater that is Ashland's most celebrated cultural offering.

Medford, just 20 minutes north of Ashland, is set in a rural-but-urban accessible environment and features spacious non-congested living. It is a commercial center with access to major retailers and an airport. One can savor award-winning wines harvested from the most diverse growing conditions around the globe and is home to Harry & David's world-famous Moose Munch and Rogue Creamery's prized blue cheese. Over 200 days of sunshine abound among breathtaking terrain, making it ideal for outdoor lovers.

- Ashland and Medford are surrounded by National Forest in one of the thirteen most biodiverse regions in the world and is a destination for trail-running, skiing, hiking, and mountain biking.
- With 785 acres of parkland and 41 miles of trails, residents can get virtually anywhere they want by walking or biking.
- Oregon's only National Park, Crater Lake, is a perfect day-trip destination. At 1,943 feet, Crater Lake is the deepest and clearest lake in the United States and the ninth deepest in the world.
- The population of the region is growing in diversity and organizations in the community are committed to an inclusive environment.

Ashland and Medford are perfect for anyone wishing to live in a stunning natural setting surrounded by the arts, culture, vineyards, and adventure.

For more information, visit:

<https://www.ashlandchamber.com> <https://www.southernoregon.org> <https://www.travelmedford.org/>

