



ST. MARY'S  
UNIVERSITY

## Vice President for Finance and Administration

### Leadership Profile



**WITT / KIEFFER**  
*Leaders Connecting Leaders*

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This Leadership Profile is intended to provide information about St. Mary's University and the position of Vice President for Finance and Administration. It is designed to assist qualified individuals in assessing their interest in this position.

## The Opportunity

St. Mary's University, founded in 1852 by Society of Mary (Marianist) brothers and priests, whose mission is deeply rooted in the Liberal Arts and in the Catholic Intellectual Tradition, was the first institution of higher learning in San Antonio and is the oldest Catholic university in Texas and the Southwest. St. Mary's is seeking a dynamic and effective individual to become the chief financial and administrative officer of the University. As the Vice President for Finance and Administration, the successful candidate will report to President Tom Mengler, and will become a key leader serving on the President's Executive and Leadership Councils.

The Vice President for Finance and Administration assists the President and the Board of Trustees in determining and implementing the University's strategic priorities and responding to the challenges facing private tuition-driven institutions of higher education. The Vice President, as the University's chief financial officer, manages the University's \$90 million budget and oversees the institution's \$169 million endowment.

The successful candidate will be a superb communicator with all constituents, with strong leadership and strategic planning skills accompanied by a sense of partnership and a commitment to transparency. The Vice President will have proven expertise in planning, managing and stewarding resources, overseeing multiple financial business functions, exceptional analytical skills, a supportive and proactive management style that promotes best practices, and the interpersonal skills to establish and maintain effective relationships.

Most importantly, the Vice President for Finance and Administration, as an Officer of the University, must possess a deep appreciation and understanding of and commitment to the values of St. Mary's Catholic, Marianist community and will strive in all endeavors to fulfill the mission of the University.

All inquiries, nominations and applications for this position, which will remain confidential, should be directed as indicated in the section entitled "*Procedure for Candidacy*" at the end of this document.

# Role of the Vice President for Finance and Administration

The Vice President for Finance and Administration is the chief administrative and financial officer of the University, reporting directly to the President and, on recommendation of the President, appointed by the Board of Trustees for a term of three years. This position provides leadership for University finance, accounting operations and business office, human resources, police, and risk management; facilities and auxiliary enterprises; supports the Board of Trustees Audit and Ethics, Finance, and Investment Committees; and serves as the chair of various University Committees.

Essential responsibilities include the following, with support from Executive Directors and Directors of various areas:

## 1. Fiscal and Financial Activities:

- Supervision of the Directors in Finance, Accounting Operation and the Business Office.
- Procedures for receiving and disbursing University funds.
- Oversight of financial accounting and reporting and auditing, investment activity and student accounts.
- Development and monitoring of the University Operating Budget.
- Administration of risk management, including property, liability and specialized coverage.
- Responsible for managing and maintaining relationships with lending institutions and other relevant University business partners

## 2. Human Resources:

- Supervision of the Director of Human Resources.
- Responsible for all aspects of human resource administration for staff.
- Support for the President/Provost as needed for faculty and senior administrator Human Resources matters.
- Administration of programs and maintenance of personnel files.
- Oversight for all statistical information and reports pertaining to personnel.
- Oversight of Title IX and VAWA compliance.

## 3. Security Operations:

- Supervision of the Executive Director/Chief of Police and University Police.
- Responsible for University Police operations and emergency management response.
- Oversight of Clery Act compliance.

## 4. Facilities and Auxiliary Enterprises:

- Supervision of the Executive Director of Facilities.
- Oversight of facilities operations, construction projects and auxiliary enterprises.

5. Relationships with others in the administrative structure:

*Member of the Executive Council*

- Serves on the Executive Council of the President along with the Provost and Vice President for Academic Affairs, Vice Presidents for Information Services, Mission, University Advancement; Vice Provosts for Enrollment Management, Student Development and Academic Affairs, Associate Vice President for Career Services; and the Chief of Staff to the President.

*Member of the Leadership Council*

- Serves on the Leadership Council of the President along with the members of Executive Council, Academic Council, Assistant Provost for Academic Operations and the Director of Athletics.

## Opportunities and Expectations for Leadership

The Vice President for Finance and Administration will join the University as it moves to secure its long-term financial future through proactive planning and resource development. The Vice President will have the opportunity to join a resourceful President in the development and implementation of initiatives that will allow the University to continue to grow and flourish in the years ahead. Additional opportunities for leadership include:

### **Partner with the President**

The Vice President for Finance and Administration will join a President with a clear and compelling vision for the future and a Board of Trustees and senior leadership council whose members are committed to working in a collaborative and supportive spirit of partnership. All share a strong commitment to continuously enhance the University's reputation and rich history of excellence. The President would welcome a partner to provide the innovative financial thinking and strategic analysis that will support future institutional planning. The Vice President for Finance and Administration will provide advice, leadership and serve as both a resource and an idea generator whose financial experience will enable beneficial change.

### **Provide Strategic Financial Leadership**

In today's higher education environment, financially sound but tuition dependent institutions can no longer rely on annual tuition increases to fund program growth as a sustainable long-term solution. As the University moves forward with its plans for the future, it faces an evolving array of financial challenges that require a sophisticated, innovative approach to long-range planning. The President, Board, and members of the senior leadership council would welcome the development of comprehensive, multi-year budget and financial models and forecasts that utilize metrics, best-practices and benchmarking, and link the allocation of resources to the University's mission and strategic goals. The new Vice President for Finance and Administration will play an integral role and contribute significant executive leadership to enhance the overall effectiveness of the University's strategic financial planning efforts to support its academic and campus master planning.

## **Promote a Culture of Communication, Collaboration and Transparency**

The members of the Saint Mary's community, including faculty, staff and administration, are committed to a well-established culture of engagement and participation across campus. The next Vice President for Finance and Administration will want to build upon this commitment through thoughtful communication and proactive interaction with all members of the community. The University seeks a strong communicator who listens well, shares information readily, and takes the initiative to encourage participation. The next Vice President for Finance and Administration will want to establish strong and productive relationships with academic leaders and other divisions to better understand their needs and to support the development of a collective vision across the institution. The Vice President for Finance and Administration will bring a flexible, creative, collaborative style and transparent communication to the budget development process and other financial initiatives. The ultimate goal is to establish a process that is inclusive, participatory, clearly defines the University's strategic priorities and establishes long-term financial strength, vitality and sustainability.

## **Professional Qualifications and Personal Qualities**

The ideal candidate will have many of the following professional qualifications and personal characteristics:

- Committed to the University's Catholic and Marianist Mission.
- Comprehensive knowledge of principles and practices of financial management, budgeting and reporting – preferably, but not necessarily, in an academic environment.
- Ability to comprehend the administration of policies and procedures unique to the college and university environment.
- Ability to communicate effectively both orally and in writing.
- Ability to establish and maintain effective working relations with employees, students, and the public.
- Ability to organize and direct major work operations and to work under pressure deadlines.
- Successful completion of background check.

### Education

- Bachelor's Degree in Business, Accounting, Financial Management or other relevant disciplines is required.
- An MBA, CPA or other relevant advanced degree in business, finance or related field is strongly preferred.

### Experience

The successful candidate will be a seasoned, innovative financial executive with excellent technical skills and management credentials who will promote an environment that encourages teamwork, collaboration, respectful and inclusive decision-making, and a sense of community.

Specifically, the next Vice President will possess:

- Experience in university financial management and leadership is preferred, including experience being part of a senior leadership team and working with boards of trustees and/or directors or other governing bodies. Senior financial leadership experience in organizations with similar complexity to a university will be considered.
- Demonstrated record of high standards of integrity and ethics;
- Experience dealing with varied constituencies in promoting programs and goals – preferably, but not necessarily, in a college or university environment;
- Ability to use one’s imagination to make decisions in situations where there are no standard answers;
- Excellent analytical, reasoning and problem-solving skills;
- Strategic decision-making, management and leadership capabilities;
- Strong communication skills and an engaging interpersonal style;
- A deep understanding of and experience with audits, and the ability to create and communicate an inclusive financial plan on a community-wide basis and with external constituents; and
- Five to seven years of experience in supervising directors in a variety of disciplines.



## About St. Mary's University

Guided by its strategic plan: [Gateway: A Vision of St. Mary's University, 2020 Goals and Objectives](#), St. Mary's University's vision is, as a Catholic and Marianist University, to become one of the finest private universities in the region – a gateway for its graduates to professional lives as ethical leaders in Texas, the nation and the world.

Located on a lovely 135-acre campus in San Antonio, the University offers a blend of historic beauty and modern facilities including high-tech classrooms, the Cotrell Learning Commons, and the Alumni Athletics & Convocation Center. Nearly 80 percent of the undergraduates live in twelve residence halls that are primarily suite-styled. St. Mary's is a nationally recognized liberal arts institution with a diverse but predominantly Hispanic and female student population of all faiths and backgrounds. With a total enrollment of 3,567 students – 2,298 undergraduate, 494 graduate and 775 law – 90 percent are from Texas. Students may choose from more than 75 programs, including one doctoral and five law programs. St. Mary's has four schools – Humanities and Social Sciences; the Greehey School of Business; Science, Engineering, and Technology – as well as a School of Law; graduate programs; and two academic libraries. Ninety-four percent of the nearly 210 full-time faculty hold terminal degrees and the student-to-faculty ratio is 11 to 1. Students are involved in more than 100 clubs and organizations and 11 NCAA Division II intercollegiate teams in the Heartland Conference.

## **The University Mission**

*St. Mary's University, as a Catholic Marianist University, fosters the formation of people in faith and educates leaders for the common good through community, integrated liberal arts and professional education, and academic excellence.*

The five fundamental characteristics of a Marianist education are: formation in faith; excellence; family spirit; service, justice and peace; and adaptation and change. These characteristics are the foundation of a holistic educational experience designed to infuse students' professional training with an understanding of individual human development, community, the natural world and God. These, in turn, inspire human vocations, ethical engagement and action, and creativity.

Our goal is to ensure students experience the St. Mary's *edge*: ensuring students complete an excellent liberal arts education in good time; helping each student discover, affirm and cultivate his or her unique talents and gifts; and preparing each student to enter the world with the skills and motivation to make a difference. Our reputation for a superior liberal education matters.

Students at St. Mary's experience a nurturing and vibrant community atmosphere that encourages and facilitates civic engagement, undergraduate and graduate research, comprehensive faculty mentoring, and service learning in San Antonio and around the world. This strong community environment is rooted in the University's Catholic and Marianist commitments to providing a holistic, whole-person education in a faith-centered, family spirit environment. That community experience is carried forward and manifested every year in the vocations and service of many alumni.

For graduates today, employability matters. Students (and parents) want to know how and which colleges will improve career prospects. We believe a quality liberal arts degree at St. Mary's is preparing our graduates well for life beyond college. Our students graduate with the education, experiences and network necessary to realize successful careers and live good lives.

For more information about St. Mary's go to: [www.stmarytx.edu](http://www.stmarytx.edu).

### **Points of excellence and recognitions:**

- In a 2015 study by The Brookings Institution, St. Mary's ranked 17th in the nation, tied for 1st in Texas, and best in San Antonio for preparing graduates for success in their careers.
- *Money Magazine* ranked St. Mary's the best university in San Antonio, fourth in Texas and 52nd of 705 nationally in its 2016 Best Colleges ranking. Schools were ranked based on quality of education, affordability and graduates' job success.
- *PayScale.com* put St. Mary's ninth of Texas schools in its 2016-2017 list, and seventh in 2015-2016, of "Best Four-year Colleges by Earning Potential". In 2014, St. Mary's was among the top five institutions in the Central South region for salary potential. In 2013, *PayScale* reported St. Mary's graduates first among San Antonio's colleges and 12th among Texas institutions in return on investment.

- The Greehey School of Business at St. Mary's was on the *Princeton Review's* national and regional lists of the Best 294 Business Schools 2017. The St. Mary's School of Law made the list of Best 172 Law Schools 2017, as well as the Most Chosen By Older Students (No. 5 of 10) ranking. And, St. Mary's twice has been named among the top graduate schools for video game design, in 2014 and 2016, ranking 25th both years. The Computer Science Department unveiled a certificate program in educational computer gaming in 2013. This certification prepares grad students for careers in the emerging industry of game-based learning.
- Every year, St. Mary's has been included on the President's Higher Education Community Service Honor Roll since its inception, and in 2011, the University received the highest-recognition Presidential Award.
- St. Mary's was 14th of 27 schools in Texas that made the *Forbes America's Top Colleges ranking*. And, St. Mary's has been listed in *Forbes* magazine as one of the best in the nation for helping women succeed in the fields of science, technology, engineering and mathematics.
- The higher the quality of the program and the lower the cost, the better the deal," as *U.S. News & World Report* put it. St. Mary's was ranked third in the West region in the Best Value Schools rankings. In its Best Colleges ranking, StMU was 21st of 124 schools in the West for academic quality, especially student outcomes. St. Mary's has been included in the list of top-tier regional universities for 23 consecutive years. And, St. Mary's has also been named among the Best in the Western region for serving veterans.
- St. Mary's lies in the upper echelon of 46 ranked colleges in Texas by the "Wall Street Journal / Times Higher Education College Rankings". In the South, St. Mary's was ranked 65th of 311 schools. Nationally, St. Mary's tied for 288th of 1,061 schools. This ranking, established in 2016, takes college resources, student engagement, graduate outcomes and learning environment into consideration.
- St. Mary's School of Law Moot Court Team won its third national championship in the past four years at the Federal Bar Association's Annual Thurgood A. Marshall Moot Court Competition.
- Graduates of St. Mary's are accepted to medical and dental schools at almost twice the national rate.
- St. Mary's business students manage an investment portfolio of \$1.8 million.
- St. Mary's consistently seeks and maintains the highest levels of academic accreditations throughout the University.
- St. Mary's is above the national average for number of students placed in internships.
- St. Mary's has won six national titles in baseball, softball, basketball and golf (one individual and one academic).

- St. Mary's is the only fair-trade-designated university in Texas.
- On average, 55 percent of a student's cost of attendance is covered by scholarships and finance aid – taking into consideration federal financial aid, scholarships, work study opportunities and other student jobs.
- St. Mary's tuition is below the national average for four-year, private institutions.
- St. Mary's offers a Four-year Pledge to incoming freshman students to stay on track to graduate in four years.
- St. Mary's has more than 35,000 active alumni, and its Alumni Association hosts an annual Fiesta Oyster Bake that attracts more than 70,000 patrons to campus. Proceeds go to scholarships and today the Alumni Scholarship Endowment exceeds \$7 million.
- St. Mary's endowment as of May 31, 2016, is \$169 million; and over the past four years, the University has raised \$50 million in gifts and pledges.

## **Visions and Goals**

Thomas M. Mengler, J.D., was appointed in June 2012, becoming the University's 13th president. He immediately launched a new strategic plan, Gateway: A Vision for St. Mary's University, in April 2013. The term "Gateway" signifies an entry point, a beginning and a pathway to a more significant stage. Gateway symbolizes and reaffirms enduring roles of St. Mary's as a Catholic and Marianist university, integrating the liberal arts with professional preparation for students to lead purposeful lives. Gateway conveys an image of students arriving at St. Mary's on individual paths, but joining a global family of men and women collaborating on behalf of the common good in service to God. Finally, Gateway evokes a dynamic vision, a strategic plan for a more vital and integrated role for St. Mary's as a partner in the future of San Antonio and the region.

President Mengler's top priorities for the University reflect the mission of the University and initiatives to creating a culture of excellence. This includes recruiting and retaining top students; strengthening and promoting the Catholic and Marianist tradition; advancing the academic mission; increasing fundraising support to the University; excellent strategic allocation and stewardship of resources; increasing financial and capital funding; and graduating ethical leaders who are highly sought after in the workplace after graduation.

Among his important priorities is the establishment of a Center for Catholic Studies. The Center will foster the formation of faculty in Catholic social thought and Marianist spirituality. Faculty from diverse disciplines will cooperate in the Center's activities and help conceptualize its programs.

The Gateway vision is for St. Mary's as a Catholic and Marianist university to become one of the finest private universities in the region – a gateway for our graduates to professional lives as ethical leaders in Texas, the nation, and the world.

## San Antonio, Texas

As the seventh largest city in the United States, San Antonio, a culturally and artistically vibrant city abounds in world-class museums, theatres, picturesque parks, and excellent sports and shopping options. San Antonio is one of the most popular destinations in the nation for conferences and visitors and is a family friendly place to live. The downtown Riverwalk offers a multitude of shops and restaurants in a lush, quiet setting imbued with history. Nearby, the Alamo and the Spanish colonial missions have become a draw for tourists worldwide. The presence of a strong active and retired military community ensures that San Antonio is a welcoming and inclusive community for newcomers to the area. San Antonio has been ranked in the top 10 cities in the nation for happy young professionals by *Forbes* magazine, and is currently number 3 on *Forbes' Best Buy Cities; Where to invest in housing in 2016*.

For more information on San Antonio please visit:

[www.sanantonio.gov](http://www.sanantonio.gov); [www.sachamber.org](http://www.sachamber.org); [www.visitsanantonio.com](http://www.visitsanantonio.com)

## Procedure for Candidacy

St. Mary's University has retained Witt/Kieffer to assist in identifying well-qualified candidates for the position of Vice President for Finance and Administration. Inquiries, nominations and applications are invited. Review of applications has begun and will continue until the position is filled. For fullest consideration, application materials should be received by **January 11, 2017**.

Interested individuals should submit a résumé along with a letter of interest describing his/her unique qualifications and details of success in Finance and Administration. Candidates should also provide the names and contact information of at least three professional references, who will not be contacted without permission. All application materials should be submitted as three separate attachments via email to the consultants supporting St. Mary's University in this search, Jane Courson and Greg Santore, at [SMUVPFA@wittkieffer.com](mailto:SMUVPFA@wittkieffer.com).

Confidential inquiries or requests for additional information may be directed to the consultants by telephone at 781-564-2626. All conversations will remain confidential unless otherwise stated and agreed. The preferred start time for this position is late spring 2017.

*Any offer of employment will be contingent upon successful completion of a clear background check. St Mary's University is an Equal Opportunity Employer.*

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

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The material presented in this Leadership Profile should be relied on for informational purposes only. This material has been copied, compiled, or quoted in part from St. Mary's University documents and personal interviews and is believed to be reliable. While every effort has been made to ensure the accuracy of this information, the original source documents and factual situations govern.

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