



Lewis & Clark



Vice President for Business and Finance and Treasurer

Position Profile
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The Opportunity

“Lewis & Clark is at once a destination and a point of departure. The work we do here and the lives we lead here prepare each of us for our uncommon journeys—wherever they may take us.”

—President Barry Glassner

Lewis & Clark College, a distinguished independent college located in Portland, Oregon, invites applications and nominations for the position of Vice President for Business and Finance and Treasurer. Reporting directly to the president, the VP serves as the college’s chief financial officer and is a key member of the leadership team. The VP oversees the financial operations of the college and provides leadership direction for the college’s facilities and human resource areas as well as some auxiliary areas and events. In addition, s/he supports the Board of Trustees Audit, Finance, Buildings and Grounds and Investment Committees.

The Position: Vice President for Business and Finance and Treasurer

The VP, working in partnership with the president, vice presidents, deans and other college officers, is charged with effectively stewarding the financial, capital and human resources of the College. The College is in a strong financial position and the new VP will have the opportunity to maintain and further enhance the College’s financial strength. The VP has three direct reports: the Associate Vice President for Finance/Controller, the Associate Vice President for Facilities and the Associate Vice President of Human Resources. The business office includes accounting, the bookstore, budget, student accounts and trusts and investments. Facilities Services includes buildings, campus planning, conferences and events, custodial services, grounds, risk management and transportation. Human resources includes payroll and student employment as well as other HR functions.

The VP will be responsible for implementing policies and practices to assure the continued long-term financial strength and sound fiscal management of the institution. The VP, working closely with the Deans and other College officers, will be responsible for overseeing the development of the College’s capital and operating budgets and will be responsible for providing appropriate and timely financial information. The VP will be responsible for ensuring that all of the College’s facilities and grounds are managed in a high quality, timely, responsible, cost effective way that supports all of the College’s activities. He or she will be expected to ensure that the College’s human resource policies and operations are current and consistent with the College’s values; that the HR department facilitates the hiring and on-boarding of new employees; and that the department provides strategic assistance to all College officers. The VP will be expected to hire and provide strong leadership, coaching, and direction to direct reports and to assure succession plans are developed for key reports.

The VP will be expected to proactively identify creative and fiscally-sound methods for funding projects and for identifying new sources of revenue as well as continuing to proactively market the campus in the summer. He or she will be expected to insure that the College receives competitive pricing and excellent service for all contracts and purchases in his or her domain. The VP will be expected to provide stellar services to the campus in all aspects of his/her portfolio. He or she will be expected to provide an environment, using appropriate incentives, to motivate new ventures and entrepreneurial activities in each of the schools and by all the vice presidents.



About Lewis & Clark

Lewis & Clark has been named by Forbes as one of the best colleges in the west. The Princeton Review and others have recognized the College for having one of the most beautiful college campuses and it has also included it on its Green College Honor Roll. The Sierra Club named Lewis & Clark as one of its top five sustainable schools. Its overseas programs have been highlighted by U.S. News and World Reports.

Presbyterian educators founded the College in 1867 as the Albany Collegiate Institute. The institution has been coeducational since its first class, which graduated in 1873, and it shed its religious affiliation in later years. In 1942, the College moved to the former Lloyd Frank estate in Portland's southwest hills and took the name Lewis & Clark, in the spirit of the explorers Meriwether Lewis and William Clark.

Two decades later, in 1965, the Northwestern School of Law merged into Lewis & Clark, and in 1984, graduate programs in education and counseling psychology were consolidated into what is now called the Graduate School of Education and Counseling. Today, the Law School ranks in the top quarter of law schools nationally and is known for its excellent environmental law program, and the Graduate School of Education and Counseling is a leading regional center for research and learning focused on topics ranging from addictions counseling to educational leadership and teaching.



Lewis & Clark operates on three lush, wooded, park-like campuses that are spread over 150 acres. The main campus, also called the Fir Acres Campus, includes a residential area; the Aubrey R. Watzek Library, which houses a collection of more than 600,000 items; extensive laboratory facilities for teaching and student-faculty research in physics, chemistry, biology, psychology, computer science, mathematics, and Earth science; a 225-seat theatre; a 410-seat performance auditorium; art studios and galleries; and extensive indoor athletic, swimming, tennis, and track and field facilities.

Today, Lewis & Clark enrolls approximately 3,500 students among the three academic units. Enrolling over 2,100 students, the College of Arts & Sciences is the largest academic division at Lewis & Clark. There are over 36,000 living alumni of Lewis & Clark – 21,000 of whom graduated from the College of Arts and Sciences. The institution is also home to 230 full-time faculty and 367 full-time staff. Lewis & Clark has a strong community service orientation and has been ranked as a “College with a Conscience” by the Princeton Review. Lewis & Clark also has a strong record of promoting sustainability: approximately 30 percent of the institution’s total electricity usage comes from wind power, and a number of the campus facilities are LEED-certified.

Leadership

The institution is led by President Barry Glassner, who became Lewis & Clark’s 24th president in October 2010, ushering in a new era of growth and an opportunity to develop an intellectual vision and strategic roadmap to guide L&C forward. Prior to coming to Lewis & Clark, President Glassner served as executive vice provost and professor of sociology at the University of Southern California.

Organizational Structure of Lewis & Clark

Lewis & Clark has three distinct schools: the College of Arts and Sciences, the Law School and the Graduate School. The three schools operate on the principal of “each tub on their own bottom” which means that each school is responsible for operating within its own resources and developing its own priorities. The College also has a common services budget which includes a variety of services and activities, including the offices of the President, Vice President, Secretary and General Counsel, Vice President of Development and Vice President for Business and Finance and Treasurer, which are supported by all three schools via a formula which is periodically

revisited. Each of the deans reports directly to the president along with the Vice President of Development, Vice President and Provost, Vice President and Secretary and General Counsel and the Vice President for Business and Finance and Treasurer.

The College of Arts and Sciences

As the second largest independent college in the state, Lewis & Clark continues the commitment of its founders to the values of a liberal arts education, and the College of Arts and Sciences is central to that commitment. The College offers four-year Bachelor of Arts programs in 29 majors and 26 minors in the arts and humanities, social sciences, and mathematical and natural sciences, as well as a variety of interdisciplinary majors and minors.

A CAS student's curriculum is composed of courses in the major, electives, and General Education, which includes the college's signature Exploration and Discovery program: a two-semester requirement that "seeks to ground students in humanity's enduring questions and to model the intellect's journey outward from these questions into today's diverse world of ideas." This program combines small-class discussion with keynote lectures and research projects and serves as an important foundational experience that unites students during their first year.

Lewis & Clark is renowned for its highly collaborative learning environment, in which faculty and students work closely together in small classes. The student-to-faculty ratio is 12:1, and the average class size is 19 students. All tenured faculty members hold terminal degrees in their fields, and their dedication to liberal arts teaching is enriched by their active engagement in research and scholarship. The CAS has 119 tenured and tenure-track faculty and eight endowed chairs. The normal annual teaching load for faculty is five four-credit-hour courses.

The CAS has become increasingly selective and diverse in recent years. Seventy percent of Lewis & Clark students come from distances greater than 500 miles. Of students in the graduating class of 2018, 77 percent were from public high schools; 78 percent were in the top quarter of their graduating class; 24 percent were students of color; and five percent were international students. The 2014 acceptance rate was 63 percent. More than 70 percent of CAS students receive financial aid through merit-based scholarships, need-based grants, loans, or campus employment.



Lewis & Clark's undergraduate student body consists of motivated, accomplished students who have won a number of major national honors. In the last 15 years, CAS students have received a total of 37 Fulbright awards, 22 Goldwater Scholarships, 15 National Science Foundation Graduate Research Fellowships, nine Truman Scholarships, eight Udall Scholarships, two Rhodes Scholarships, two Hertz Foundation Fellowships, two Madison Fellowships, and several other awards.

The CAS is housed on the Fir Acres campus, with scenic views of both Mount Hood and Mount St. Helens. The CAS is primarily a residential college; students are required to live on campus for the first two years, unless they are a Portland resident. Although there are no fraternities or sororities, the College supports nearly 70 student organizations, 15 music department ensembles, and more than 70 outdoor expeditions per year. CAS also offers numerous social and academic programs to enhance the quality of student life through such offices as Student Leadership and Community Service, Student Employment, Career Development, International Student Services, Inclusion and Multicultural Engagement, Religious and Spiritual Life, the Counseling Center, the Writing Skills Center, the Symbolic and Quantitative Resource Center, and Student Support Services.

A substantial percentage of CAS students participate in varsity, club, and intramural sports, and Lewis & Clark, a member of Division III of the NCAA, fields women's and men's teams in a wide range of sports, including football, baseball, basketball, volleyball, track & field, cross country, rowing, golf, swimming, tennis, soccer and softball.

The Law School

Lewis & Clark's law school, founded in Portland in 1884 as the state of Oregon's law school, reorganized as the private Northwestern College of Law in 1915. In 1965 the school merged with Lewis & Clark and was renamed Northwestern School of Law of Lewis & Clark College. Soon after, the law school built a new campus just west of the undergraduate campus. During the 1970s, the law school emerged from the position of a highly respected regional institution to that of national prominence, distinguished for its legal education, research, and service.



The law school started out as a night school for many years and with encouragement from accreditors and the college, broadened admission and recruitment for daytime enrollment. The combination of both a day and evening curriculum allows the law school to offer tremendous flexibility. Students can attend full-time or part-time and can attend during the day or in the evening. The Law school received ABA accreditation in 1974.

The law school currently has an enrollment of 650 students with 207 new students in fall 2014. U.S. News and World Reports rank its Environmental Law program number one. Over the years, many members of the U.S. Supreme Court have visited campus. Last year, John Roberts, Chief Justice of the U.S. Supreme Court presided over the College's first Annual Advocate of the Year Competition and Justice Sonia Sotomayor visited with students on campus. The Law School offers J.D. programs in a variety of specialties including animal law, environmental and natural resources, criminal, global, intellectual property and public interest law. It also offers LL.M. programs in environmental and natural resource law and in animal law.

The Graduate School

The Lewis & Clark Graduate School of Education and Counseling offers students an innovative curriculum combining challenging coursework with school/agency/community-based field experiences to create a dynamic learning environment. It is known for rigorous academic study, promoting diverse perspectives in dialogue, supporting individual growth, and holding a commitment to social justice as a central guiding principle. The programs for educators and counselors prepare students to meet the complex challenges of professional life in diverse school, agency, and community settings and to work effectively with all individuals and families. The programs recognize that issues of race and ethnicity, gender, gender identity, socioeconomic status, sexual orientation, and other elements of social identity play a fundamental role in the professional practice of its students. Its teaching, research, and service activities all draw upon deep understandings of professional knowledge and the needs and assets of the vibrant and varied communities in the Portland metro area, state, region, and beyond.

The graduate school enjoys ongoing relationships with hundreds of organizations, including schools, agencies, clinics, nonprofit organizations, and legislative bodies. Each year, its students provide over 200,000 hours of service to Portland-area organizations through internships and practica.

It offers [18 graduate degree programs](#), including masters of arts and science (M.A. and M.S.), educational specialist (Ed.S.), and doctoral degrees (Ed.D.), as well as licensure and certificate programs in professional mental health and addiction counseling; higher education student affairs administration; marriage, couple, and family therapy; education administration and leadership; school counseling; school psychology; and teaching. The graduate school had an enrollment of 655 students in fall 2014. Programs are accredited by the appropriate state and national professional organizations.



Location- Portland, Oregon

Lewis & Clark College is located six miles from downtown Portland, Oregon, a vibrant city with a population of roughly 582,000 (1.95 million in the metropolitan area). Proclaimed as North America's "Best Big City," by *Money* magazine, Portland combines natural beauty with an exciting mix of historic and contemporary architecture, a bustling local scene, abundant recreational opportunities, and sumptuous dining. The city has an excellent public transportation system, and Lewis & Clark offers a free shuttle service between Lewis & Clark's main campus and downtown. The metropolitan Portland area is home to an impressive collection of bookstores and cultural venues and is a leader in the region for its high-tech industry, progressive social services, and prosperous business environment. Located on the banks of the Willamette River only 60 minutes from snow-capped peaks of the Cascade Range in one direction, and 90 minutes from the un-crowded beaches of the Pacific Ocean on the other, Portland affords easy access to a wide range of outdoor recreational opportunities. To learn more about Portland, please see

<http://www.lclark.edu/portland/>.

Board of Trustees

The college is overseen by a Board of Trustees with 37 members lead by a chair and vice chair. Board members serve for terms of three years and they can serve an unlimited number of terms. Trustees at Lewis & Clark come from many disciplines and areas throughout the United States and the world. They share a common commitment to the College and its place in the global higher education community.

Fundraising

The College raised a total of \$8.9 million in FY 2014 which represents an increase of 10.7% over FY 2013 and has set a goal of \$9 million for FY 2015.

	FY 2011	FY 2012	FY 2013	FY 2014
Gifts and Commitments	\$8,377,649	\$16,781,047	\$8,087,625	\$8,953,495
Estate Gifts (Bequests)	\$180,599	\$10,139,033	\$60,351	\$1,005,838
Gifts/Commit. less Bequests	\$8,197,049	\$6,642,014	\$8,027,274	\$7,947,657

Gifts to the college's four annual funds increased by 7% exceeding \$2 million dollars in FY 2014. All four annual funds had increases in support. The CAS Annual Fund continued its steady rise crossing the \$1.5 million threshold with contributions totaling \$1,536,193, up from the \$1,484,132 raised in FY14. This was well in excess of the \$1,340,000 goal that had been budgeted by the Business Office. The Law School Annual Fund also saw a rise in its contributions, up 12 percent from \$358,410 in FY13 to \$401,932 in FY14. Finally, contributions to the Graduate School Annual Fund increased from \$20,269 in FY13 to \$25,209 in FY14. The fourth fund, the Lewis & Clark Fund is the smallest and has a goal of \$75,000 for FY 2015.

Finances

Lewis & Clark's FY 2014 operating budget was \$111 million. More than 71% of its expenditures are supported by net tuition revenue and an additional 13.9 percent by auxiliary enterprise revenues. The College has an endowment of \$224 million and debt of \$108 million. All the debt bears a fixed rate of interest of 5.4%; it matures in 2041 and cannot be refinanced for seven years. The College has a Moody's rating of A3 stable.

FY 2014 Operating Budget Actuals (\$000)

	CAS	Law	Graduate	Common Services	Total
Revenue					
Tuition	\$85,484	\$24,472	\$10,650		\$120,606
(Fin. Aid)	(\$35,589)	(\$5,423)	(\$151)		(\$41,163)

Net Tution Rev.	\$49,895	\$19,049	\$10,499		\$79,443
Auxiliaries	\$14,594	\$324		\$572	\$15,490
End. Spending					
- Base	\$5,732	\$1,676	\$224	\$169	\$7,801
- Supplemental	\$1,308	\$365	\$36	\$154	\$1,863
Gifts and Grants	\$2,331	\$648	\$41	\$282	\$3,302
Other Income	\$2,858	\$936	\$311	\$498	\$4,603
Total Revenues	\$76,718	\$22,998	\$11,111	\$1,675	\$112,502
Expenses					\$0
Salaries and Ben.	\$30,834	\$14,311	\$6,668	\$13,945	\$65,758
Op. and other Exp	\$18,964	\$4,361	\$860	\$8,815	\$33,000
Depreciation	\$3,925	\$739	\$193	\$2,060	\$6,917
Interest Exp.	\$3,848	\$743	\$183	\$1,236	\$6,010
Common Cost					
Alloc.	\$17,556	\$3,620	\$3,205	(\$24,381)	\$0
Total Expenses	\$75,127	\$23,774	\$11,109	\$1,675	\$111,685
Net	\$1,591	(\$776)	\$2	\$0	\$817

Each school is credited with its own tuition, endowment, gift and other revenue and is responsible for developing its own budget within its revenue constraints. Recently, the Law School and the College of Arts and Sciences have faced some challenges. The Law School, like most in the country, has seen a significant enrollment decline along with a 50% tuition discount rate. The CAS has been able to meet or exceed its net tuition targets each year, but like many peer institutions, has seen an increase in the tuition discount rate required to bring in the class. The Graduate School, which was enrollment challenged a few years ago, is now seeing healthy enrollments relative to its expenses. Consideration is being given to permitting the Law School to run deficits for the next two years as it moves to establish a new financial equilibrium.

The tuition and fee charges in the CAS are \$43,022 in FY 2016 while in the Law School they are \$40,114 for full-time day students and \$30,084 for part-time and evening students. Tuition is charged by the credit hour in the Graduate School and it varies by program. All Schools offer institutional aid.

The College has an endowment spending policy which provides for the spending of 4.5% of the endowment corpus based on the prior 16 quarters. In addition, the College can spend an additional 1.5% of the endowment corpus; this additional spending is required, by resolution of the board, to decline by .1% per year until it reaches .5%. In FY 2013, it spent a total of 5.1% and in FY 2014 it spent 5.6%.

Facilities

The College operates on a beautiful campus with 150 acres of land and 1.3 million gross square feet of space six miles from the center of Portland. Each School operates on its own campus but the three campuses are adjacent to each other and managed by a central facilities staff. The College

prides itself on its commitment to sustainability. It has several LEED certified buildings and it is on Princeton's Green Rating Honor Roll and was ranked by the Sierra Club as one of the top 5 "Coolest Schools" in 2014.

According to Sightlines, the College has about \$80 million in deferred maintenance. Each year, several capital projects are undertaken to deal with these issues. The College fully budgets depreciation which gives it about \$7 million a year to support capital spending. In the long-term, there are needs for several major capital projects, including a new science facility and a new or remodeled Campus Student Center, but funds are not currently available for these projects.

Challenges and Opportunities for the New Vice President

Provide Leadership to the Finance Division

The next vice president for business and finance and treasurer must have excellent management skills to lead the areas that are in his/her division. S/He needs to mentor and develop the staff and ensure that they are a high performing team. Several key people in the business office are retiring including the Associate VP/Controller. The new VP will need to strategically hire several new staff. The vice president needs to have a collegial style and be able to effectively communicate with all members of the division. S/He needs to be able to ensure a high level of customer service, while reviewing the division's policies and procedures. The vice president must work with the division to increase and enhance its use of technology in all areas.

The HR department is still in the process to transitioning to WorkDay which has changed the way it does business. The department needs assistance in completing this transition, in increasing its service levels to the community and in strategically organizing its activities and services. In terms of the budget process, consideration needs to be given to moving to a multi-year process as well as to simplifying the process especially in the College of Arts and Sciences.

Continue to Maintain the Colleges' Strong Financial Position

Assure that the College continues to operate in a fiscally responsible manner. Provide trustworthy and timely data to all decision-makers so that they have the required information to make fiscally appropriate decisions. Make sure that the College continues to have clean audits.

Upgrade the Financial Information and Systems Provided to the Campus and Provide Trustworthy, Timely Data to the Campus

The finance area is still using the Colleague system which is difficult to use and not user friendly in providing data to the community. Human Resources has implemented WorkDay and the new VP will need to decide if the finance modules of this system should be implemented or what system changes need to be made to provide timely, appropriate and easily accessible information to all budget owners.

Provide Stellar Services

The new VP needs to insure that the areas in his or her portfolio provide outstanding services to the College. The services need to be provided in a timely, high quality manner with a positive attitude and appropriate follow-up. The service units need to engender trust and confidence among all users.

Motivate an Entrepreneurial Culture in all the Schools

Lewis & Clark as a whole and each of the schools individually need to develop new sources of revenue to insure a long-term healthy financial equilibrium which will allow the College to continue to serve all of its students at a high level of quality with a multitude of curricular and co-curricular activities. The new VP needs to creatively provide a financial structure that will allow measured risk-taking by the schools in moving into new areas and to provide venture capital for new endeavors. The new VP needs to have ideas for new sources of revenue outside of those that are within the specific domains of each school and needs to be able to implement them in his/her department.

Qualities and Qualifications

The successful candidate will have outstanding financial and management skills. He/she will demonstrate unquestioned integrity, a strong personal work ethic and be an optimistic, self-motivated, results-oriented person. The successful candidate will be a good listener and will know how to work across diverse constituencies and organizations. He or she will have at least several years of responsible experience managing a large staff with diverse responsibilities in a complex organization; will have experience working with boards; and will possess strong and effective interpersonal skills that engender trust and cultivate collaboration. The successful candidate will be creative, willing to innovate and will have a sense of humor.

S/he should have substantial financial, administrative and operational experience in senior leadership positions managing a large staff with diverse responsibilities in a complex organization. Experience in higher education or large nonprofit organizations is highly desirable. Relevant advanced degrees and/or certifications such as a MBA or CPA are desirable. For additional information about the college, please go to [Lewis & Clark's website](#).

Procedure for Candidacy

Nominations and applications are invited for this position. Review of applications will begin immediately and candidate material received by February 4th will be assured full consideration although recruitment will continue until an appointment is announced. Applications (including a cover letter, resume, and the names and contact information of four references) should be [uploaded here](#). Lapovsky Consulting is assisting Lewis & Clark College in this search. For nominations, questions, or additional information, please contact:

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Lewis & Clark College is an affirmative action/equal opportunity employer that honors its liberal arts tradition as a learning community committed to diversity and inclusion.

