



## Vice President, Finance & Operations

Leadership Profile

May 2021



*WittKieffer*

## Executive Summary

Adler University, an institution that is a fierce champion of social justice, seeks a vice president, finance & operations (VPFO) to provide strategic direction of financial management and operations for the University.

[Adler University](#) educates students to engage the world and create a more just society. Established in 1952, it enrolls more than 1,800 students in master's and doctoral programs for social change through its campuses in downtown Chicago and Vancouver, as well as an online campus. Adler University's mission is to continue the pioneering work of Alfred Adler, the first community psychologist, by graduating socially responsible practitioners, engaging communities and advancing social justice.

Under the direction of [President Raymond E. Crossman, Ph.D.](#), the VPFO serves as a key member of the senior management team and the President's Cabinet. The VPFO provides thought leadership to the university and partners with the senior management team of the University to realize its vision of advancing socially responsible practice, healthy communities and a more just society.

The VPFO will collaborate with the university community in the development and implementation of the university's annual operating budget of approximately \$47.3 million while also ensuring operational excellence and long-term visioning toward supporting the institution's strategic plan and macro-level vision. The VPFO provides oversight, planning and coordination of the Information Technology, Finance & Accounting, Facilities (Chicago), Registrar's Office, Financial Aid and Institutional Effectiveness departments of the University.

Adler is searching for a strategic problem solver who takes a values-based approach to leading finance and operations. The successful candidate will be a confident and innovative leader with strong knowledge of strategic planning, process improvement, fund accounting and project management. The new leader will also understand and respect shared governance and promote an environment that encourages teamwork, inclusive decision-making and a sense of community.

Candidates should have a track record of successful senior leadership in business management, operations, finance or a related area. Candidates should also be able to demonstrate accomplishments developing and attaining strategic goals and objectives, preferably in higher education or a similar complex organizational setting. The ideal candidate should also show strong demonstration of alignment with Adler's social justice mission and vision. While successful leadership experience in higher education is preferred, analogous experience outside higher education will be considered. A master's degree in Higher Education Leadership/Administration, Business Administration, Operations Management, Accounting, Finance or relevant discipline is required.

To submit a nomination or express personal interest in this position, please see Procedure for Candidacy on page 10 of this document.

## Role of the Vice President, Finance & Operations

Under the direction of the president, the vice president, finance & operations serves as a key member of the senior management team and the President's Cabinet. The VPFO attends meetings of the board of trustees and staffs the finance and audit committees of the board. The VPFO directs, plans and sets the strategic direction for all functions within scope of the institution's financial management and operations verticals.

The VPFO oversees an institutional budget of \$47.3 million and a staff of 7. The following roles are direct reports to the VPFO:

- AVP for Finance
- AVP for Planning & Budgets
- AVP for Information Technology
- Registrar
- Director of Financial Aid
- Director of Institutional Effectiveness
- Manager of Facilities

### Essential Duties and Responsibilities

#### Financial Management & Fiscal Operations

- Manages the financial affairs of the University, including:
  - Monitoring budgets and purchasing, providing monthly financial reports, preparing projections and multi-year planning financial models.
  - Communicating budget, financial results and fiscal responsibility to stakeholders across the University.
  - Reviewing contracts for liability and contractual commitments with the assistance of legal counsel as needed.
  - Advising the president and board of trustees regarding the University's fiscal health, sustainability and growth.
- Collaborates with other University leaders to develop short- and long-term strategies and financial plans consistent with the strategic plan and in compliance with generally accepted accounting principles (GAAP) and practices.
- Measures compliance with approved operating plans and report results to all levels of management, auditors, federal agencies and accrediting agencies. Prepare information and reports for the president, and at the president's direction, present information and report to the finance and audit committees of the board of trustees.

- Working with the Institutional Advancement Office, oversees management of operating, endowment and investment accounts consistent with donor-required and other fund restrictions.
- Where applicable, negotiates agreements for the University with outside organizations including banks, investment managers, vendors, consultants, etc., monitoring their performance and approving payments.

#### Operations Management

- Ensures operational excellence through the oversight of all services necessary to maintain efficient and effective operations for a 24/7 university and to meet the demands of its students, faculty and staff.
- Determines and formulates policies and provides overall direction of university operations.
- Ensures compliance with all domain-specific and relevant laws, regulations, policies and operating agreements.
- Directs and sets the strategic priority for operational departments including: Information Technology, Finance & Accounting, Facilities (Chicago), Registrar's Office, Financial Aid and Institutional Effectiveness.
- Manages domain-specific operating budgets and allocates resources to optimize business results.
- Develops strategies to drive growth, profitability and effective allocation of resources as well as continuously evaluating opportunities for system-wide process improvement driving operational efficiencies.
- Prepares and/or contributes to the preparation of reports, briefings, presentations and responses on institutional and strategic issues, as appropriate.
- Oversees, manages and monitors the University's policies on risk and insurance management.
- Other duties as assigned or required.

#### Essential Knowledge, Skills and Abilities

- Understanding of equity and an ability to proactively evaluate financial and operational decisions and actions in alignment with institution's social justice mission
- Knowledge of strategic planning principles and methodology and a strong ability to applying principles and methodology toward meeting established priorities and goals prioritize and execute to meet goals
- Knowledge of fund accounting and project management
- Experience working within dynamic environments with internal and external stakeholders as well as the ability to leverage influence to drive change and influence stakeholders
- Ability to consistently identify opportunities for improvement and make recommendations based on observations
- Strong critical thinking, problem-solving and visioning acumen

- Ability to proactively identify challenges and barriers to stated objective and employ assistance in addressing these
- Strong collaboration acumen and abilities
- Demonstration of emotional intelligence and professional maturity
- Strong research acumen and abilities
- Strong communication acumen including written, oral and listening

## Opportunities and Expectations for Leadership

President Crossman's approach to leadership calls for a strong vice president, finance & operations who is prepared to address the following challenges and opportunities:

- **Serve as a strategic partner to the University**

The new leader will be an enthusiastic and critical thought partner in strategic decision-making and planning for the University. The president, cabinet and board of trustees will look to the VPFO to be an idea generator and provide entrepreneurial financial and operational strategic thinking to support institutional planning.

The University's [strategic plan](#) was adopted in 2015 and identified 44 goals for the University aligned with its commitment to Alfred Adler's principles, responsiveness to social and economic conditions, emergence of shifting student needs in higher education and dedication to excellence. The plan has been extended to 2022. At the heart of all strategy and planning must be an alignment to Adler's mission and values. The VPFO will play a key role in ensuring that the mission of the University is guiding the financial and operational decisions that are made.

- **Provide leadership to the newly formed Finance and Operations team**

The VPFO will provide leadership to the following departments: Information Technology, Finance & Accounting, Facilities (Chicago), Registrar's Office, Financial Aid, and Institutional Effectiveness. This is a newly formed but high-performing team that is already finding ways to work collaboratively. The VPFO will inspire and motivate this team, creating a shared mission and establishing goals to support to the University's mission. The VPFO will be a strong partner with the team and provide support for their verticals as they move forward new initiatives. Additionally, the VPFO will want to assess and review the division to identify areas that may be challenged due to limited staff or resources and develop plans that enhance efficiency and customer service to include the appropriate application of information and other technologies.

- **Foster a culture of trust, collaboration and transparency with the University community**

The VPFO will have a commitment to thoughtful, transparent communication and proactive interaction with all members of the Adler community. The University seeks a strong communicator who listens well, shares information readily and takes the initiative to encourage participation. The VPFO will build strong and productive relationships with stakeholders across the University to better understand their needs and to support the development creative solutions to support the University's needs.

## Professional Qualifications and Personal Qualities

The ideal VPFO will be a strategic problem solver who takes a values-based approach to leading finance and operations. The successful candidate will be a confident and innovative leader with strong knowledge of strategic planning, process improvement, fund accounting and project management. The new leader will also understand and respect shared governance and promote an environment that encourages teamwork, inclusive decision-making and a sense of community. Candidates should be able to demonstrate accomplishments developing and attaining strategic goals and objectives, preferably in higher education or a similarly complex organizational setting. The ideal candidate should also show strong demonstration of alignment with Adler's social justice mission and vision.

Strong candidates will also possess the following qualities, qualifications, and characteristics:

### Education and Experience

- Master's degree from an accredited institution of higher learning in Higher Ed. Leadership/Administration, Business Administration, Operations Management, Accounting, Finance or relevant discipline required. Terminal degree preferred.
- Minimum seven years of experience performing executive-level work (short and long-term strategic planning, human capital supervision and development, priority and action plan development, risk mitigation and financial management) in business management, operations, finance or related functional area required. Experience in higher education strongly preferred.
- Project Management Professional certification or Lean Six Sigma designation preferred.

### Communication:

- Effectively expresses oneself in all oral and written communications.
- Exhibits good listening and comprehension skills.
- Keeps others informed, as well as responds, in a timely manner.
- Demonstrates match between words and actions.
- Responds with tact, diplomacy, respect and composure when dealing with others.
- Promotes the spirit and essence of the University's Vision, Mission, Values and Key Strategies through both verbal and written communication.

### Teamwork and Collaboration:

- Cooperates with others toward the achievement of common goals.
- Seeks consensus and win-win solutions to problems and conflicts.
- Contributes actively and participates fully in team initiatives.
- Puts success of the team above own interests.

- Builds and maintains constructive work relationships.

**Responsive to Change:**

- Supports changes in the work environment.
- Displays a proactive, problem-solving approach toward work.
- Committed to life-long learning by continuously increasing skills, knowledge and effectiveness.
- Actively seeks and initiates creative and innovative solutions.
- Exercises sound, accurate and informed independent judgment when needed.

**Quality-Driven and Accountable:**

- Results-oriented and committed to quality through continuous process improvement.
- Eliminates ineffective activities and closes performance gaps.
- Anticipates and responds to customer needs.
- Monitors own performance, accept responsibility for actions and actively seeks feedback.
- Meets deadlines and completes projects and activities in a professional, timely manner.
- Seeks opportunities to increase productivity and/or reduce costs while maintaining highest quality standards (fiscally responsible).

**Support of Vision, Mission, Values, Key Strategies:**

- Supports and models the University's Values of: social interest, compassion, justice, respect for the individual, honors diversity and difference, intellectual rigor, optimism and collaboration.
- Articulates the School's Vision, Mission and Key Strategies in a way to educate others.
- Demonstrates active commitment in advancing the University's Vision, Mission and Key Strategies.
- Exhibits personal integrity, honesty, zeal and compassion.
- Aligns work processes to advance the University's strategic plan and key strategies.

## About Adler University

### Overview

Adler University educates students to engage the world and create a more just society. Adler University's mission is to continue the pioneering work of Alfred Adler, the first community psychologist, by graduating socially responsible practitioners, engaging communities and advancing social justice. The University is a Community Engaged Institution as classified by the Carnegie Foundation for the Advancement of Teaching.

A singular idea has consistently driven the institution's curricula, pedagogy and community engagement. That guiding idea is Alfred Adler's groundbreaking concept of social interest or *gemeinschaftsgefühl* – the idea that our health resides in our community life and connections. This idea today is more necessary than ever to drive the work and change most needed in challenged communities around the world.

In 1952, Rudolf Dreikurs and his colleagues established the institution as the Alfred Adler Institute in Chicago – to train practitioners to apply Adler's idea of social interest. Alfred Adler was the first to focus on wellness in the community context. He advanced the revolutionary idea that responsible practitioners must advocate to change the social conditions that affect population health and well-being.

Today, with three campuses – Chicago, Vancouver and online – Adler University is a graduate institution that enrolls more than 1,800 students in master's and doctoral programs for social change. The institution continues Alfred Adler's pioneering work through preparing socially responsible practitioners, engaging communities and advancing social justice. In practice disciplines such as psychology and public policy, students learn to be social justice practitioners, specifically to be effective social change agents in pursuit of justice.

The University has established and carefully maintains a high-quality student-focused learning environment, with small class size (average 10 students per section) and close faculty mentoring (ratio of 13 students per core faculty member). Following a competitive admissions process, 96% of students are retained year-to-year, 80% of students graduate, 91% of alumni are employed within a year of graduation and 96% of alumni report that their preparation in socially responsible practice is important to them in completing their daily work. The loan default rate is 3% in the United States and 0% in Canada. Over 4,000 alumni are changing the world.

### Outcomes of the Mission

Alfred Adler began community psychology by articulating the constructs of *gemeinschaftsgefühl* (social interest or the connection between individual and community well-being) and systemic / structural community intervention (such as preventative public health measures). Adler University, as a higher education institution, continues his work today through the production of three outcomes which are specified in the mission:

## **Socially Responsible Practitioners**

Socially responsible practitioners are educated to be effective personal and social change agents in the pursuit of justice.

## **Community Engagement**

Community engagement is collaborative partnership that strengthens communities, provides service and prepares students.

## **Social Justice**

Social justice refers to equitable distribution of economic, political, civil, cultural, social and other resources and opportunities in society in order to promote the optimal development of persons and communities.

## **Vision**

The leading academic institution advancing socially responsible practice, healthy communities and a more just society.

## **Values**

There are five values that guide expectations and behavior at Adler University:

- **Social Interest:** We are part of and invested in community. We act and collaborate with compassion and social responsibility.
- **Pluralism:** We respect and celebrate human diversity and difference.
- **Courage:** We champion leadership, innovation and creativity, act on principle and challenge the status quo.
- **Excellence:** We embrace the highest level of quality, rigor and integrity for education, scholarship, performance and outcomes.
- **Pragmatism:** We are outcome-oriented and evidence-based, and we pursue real-world solutions and measurable results.

Adler's curricula embodies its values and mission to produce socially responsible practitioners, or contemporary Adlerian practitioners specifically prepared to be social change agents in the pursuit of justice. Adler directly engages communities in the preparation of socially responsible practitioners through structures such as the [Institute on Public Safety and Social Justice](#), [Center for Civic Learning and Community Action](#) and [Adler Community Health Services](#).

## Leadership

### Raymond E. Crossman, Ph.D, President



Raymond E. Crossman is Chicago's second longest-serving university president and the USA and Canada's longest-serving LGBTQ university president. In 2003, Dr. Crossman was appointed the fifth president of Adler University. During Dr. Crossman's tenure, Adler University has grown from a psychology school enrolling about 200 students to a university enrolling about 1,800 graduate students at its Chicago, Vancouver and online campuses. With his leadership, the University launched the Adler Institutes for Social Change and Adler Community Health Services – both supporting the health of communities in Chicago and Vancouver.

Dr. Crossman currently serves on the board of directors for Chicago Public Media, Thresholds, Illinois Campus Compact and the LGBT Fund for the Chicago Community Trust. He co-founded LGBTQ Presidents in Higher Education in 2010, hosted its inaugural meeting in Chicago, and co-chaired the growing advocacy organization until 2018. His community work has included service on the boards of the Center on Halsted (Vice Chair), Chicago Loop Alliance and OUT at Chicago History Museum (Chair).

He was recently appointed to the Presidents' Council of the Association of Governing Boards of Colleges and Universities. He serves on the editorial board of Training and Education in Professional Psychology, and he serves on the Higher Learning Commission (HLC) Institutional Actions Council. Dr. Crossman is a Past President of the National Council of Schools and Programs of Professional Psychology, is a Past Chair of the Council of Chairs of Training Councils of the American Psychological Association and served on the Commission on Accreditation of the American Psychological Association. He received the Significant Professional Contribution Award from the Hawaii Psychological Association.

Dr. Crossman received his B.S. (summa cum laude) in Psychology and Fine Arts from Fordham University; he earned his M.A. and Ph.D. in Clinical Psychology from Temple University; and he studied at Philadelphia Child Guidance Clinic.



## Procedure for Candidacy

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

WittKieffer is assisting Adler University in this search. For fullest consideration, candidate materials should be received by **June 11, 2021**.

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

Nominations and inquiries can be directed to:

Christine J. Pendleton and Lauren Bruce-Stets

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

*Adler University offers equal employment opportunities to all persons without regard to race, color, ethnicity, religion, sex, sexual orientation, gender identity, national origin, age, marital status, physical or mental disability, parental status, housing status, genetic information, arrest or criminal record, source of income, or military status, in accordance with applicable federal, provincial, state, and law equal employment opportunity laws.*