



## **Assistant Vice Chancellor/Controller**

### Leadership Profile

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## Organization Overview

The California State University (CSU) is the largest comprehensive university system in the country, and one of three public higher education systems in the state, alongside the University of California and the California Community Colleges.

The CSU traces its roots to 1857, when San José State became the first institution of public higher education in California. In 1960, the California Master Plan for Higher Education brought 17 colleges together to form what is now known as the CSU.

Today, the CSU is comprised of its 23 campuses, spanning 800 miles from Humboldt in the north to San Diego in the south, and offers undergraduate, graduate and select doctoral degrees, either independently or in partnership with the UC or private universities. The CSU also maintains several unique research facilities and numerous satellite campuses across the state.

Each CSU campus has its own distinct identity, yet all share the same mission: to give students access to possibility that leads to personal and societal transformation and creates lasting impact for California.

The CSU draws its students from the top third of the state's high school graduates and educates the most ethnically, economically, and academically diverse student body in the nation. The CSU provides more than half of all undergraduate degrees granted to California's Hispanic, African American, and Native American students combined and nearly one-third of CSU students are the first in their families to attend college.

Ninety-five percent of the CSU's nearly 486,000 students come from California, with 89 percent of new first-time freshmen coming from California public high schools and 95 percent of undergraduate transfers from the California Community Colleges. The CSU confers nearly 129,000 degrees annually – nearly half of the state's bachelor's degrees - and has conferred degrees on more than 3.9 million living alumni.

The CSU's undergraduate fee is the lowest among comparable institutions nationwide, with the annual undergraduate tuition and fees for full-time California resident students at \$7,363. In 2019-2020, more than \$4.5 billion in financial aid was distributed to nearly 391,000 students, 83 percent of the CSU's total student population.

The CSU employs nearly 56,000 people, including nearly 27,000 faculty members – over 78 percent as tenure or tenure-track professors – and approximately 27,000 staff members. The CSU also has gender parity among the 23 campus presidents, with 12 women currently serving in the campus leadership role. This figure far outpaces the state and national averages for public and private colleges and universities.

CSU campuses also play a major role in their communities, regularly hosting lectures, workshops, visual and performing arts programs, and athletic events. CSU campuses sustain partnerships with local businesses, industries, and cultural and educational institutions, many of which provide internships and other learning opportunities.

For every dollar the state invests in the CSU, \$6.98 is returned to the economy. The CSU trains more teachers than all the state's other institutions combined and nearly eight percent of the nation's teachers graduate from the CSU.

## Mission, Vision and Values

### The mission of the California State University is:

- To advance and extend knowledge, learning, and culture, especially throughout California.
- To provide opportunities for individuals to develop intellectually, personally, and professionally.
- To prepare significant numbers of educated, responsible people to contribute to California's schools, economy, culture, and future.
- To encourage and provide access to an excellent education to all who are prepared for and wish to participate in collegiate study.
- To offer undergraduate and graduate instruction leading to bachelors and higher degrees in the liberal arts and sciences, the applied fields, and the professions, including the doctoral degree when authorized.
- To prepare students for international, multi-cultural society.
- To provide public services that enrich the university and its communities.

### To accomplish its mission over time and under changing conditions, the California State University:

- Emphasizes quality in instruction.
- Provides an environment in which scholarship, research, creative, artistic, and professional activity are valued and supported.
- Stresses the importance of the liberal arts and sciences as the indispensable foundation of the baccalaureate degree.
- Requires of its bachelor's degree graduates breadth of understanding, depth of knowledge, and the acquisition of such skills as will allow them to be responsible citizens in a democracy.
- Requires of its advanced degree and credential recipients a depth of knowledge, completeness of understanding, and appreciation of excellence that enables them to contribute continuously to the advancement of their fields and professions.
- Seeks out individuals with collegiate promise who face cultural, geographical, physical, educational, financial, or personal barriers to assist them in advancing to the highest educational levels they can reach.
- Works in partnership with other California educational institutions to maximize educational opportunities for students.
- Serves communities as educational, public service, cultural, and artistic centers in ways appropriate to individual campus locations and emphases.
- Encourages campuses to embrace the culture and heritage of their surrounding regions as sources of individuality and strength.
- Recognizes and values the distinctive history, culture, and mission of each campus.
- Promotes an understanding and appreciation of the peoples, natural environment, cultures, economies, and diversity of the world.
- Encourages free scholarly inquiry and protects the University as a forum for the discussion and critical examination of ideas, findings, and conclusions.
- Offers degree programs in academic and applied areas that are responsive to the needs of the citizens of this state and provides for regular review of the nature and extent of these programs.
- Offers or proposes to offer instruction at the doctoral level jointly with the University of California and with private institutions of postsecondary education, or independently in the fields of education, nursing, physical therapy, or audiology, where the need is clearly demonstrated.

**For more information on CSU, please visit their website:** <https://www2.calstate.edu/>

## Position Summary

The Assistant Vice Chancellor/Controller is a strategic partner to the Executive Vice Chancellor and CFO's executive team, seeking to help the CSU continue to succeed in achieving its vital public mission by developing an office that is known as a trusted source of advisement and works collaboratively with key stakeholders across the University system.

Under the general direction of the Executive Vice Chancellor/CFO, the Assistant Vice Chancellor/Controller functions as a primary financial leader for the CSU system, with responsibility for the Accounting; Financial Services Administration; Management & Accounting Practices; Sponsored Programs Administration; and Systemwide Financial Standards & Reporting departments. These responsibilities are both systemwide and for the Chancellor's Office. The Assistant Vice Chancellor/Controller is a member of the EVC/CFO's executive team and is the key advisor for financial management matters. The Assistant Vice Chancellor/Controller will also assist and advise the campus Business/ Administrative Vice Presidents and Assistant Vice Presidents (CABO and FOA).

## Reporting Relationships

Reporting to the Executive Vice Chancellor and Chief Financial Officer.

Direct reports include:

- Administrator II/Director, Financial Systems Statutory Reporting and Tax Administration
- Accounts Payable Manager
- Administrator III/Associate Director, Financial Services Accounting
- Director, Financial Reporting and Review
- Administrator III/Director, Sponsored Programs Administration
- Administrator II/Assistant Director, FS Administration

## Responsibilities

The successful Assistant Vice Chancellor/Controller candidate will:

- Act as a trusted source of advisement and work collaboratively with key stakeholders across the University system. Interface, liaise and collaborate with campuses, auxiliaries, vendors, CSU specialty groups and entities external to the CSU. Pursuing change as needed to improve operations and support CSU and campus operations.
- Direct the work of senior staff in the functional units responsible for developing standards, policies, and procedures in the Financial Services area with focus on supporting and enabling campuses while meeting requirements and maintaining compliance with state and other reporting guidance.
- Direct the financial operations for the following departments: Accounting, Financial Services Administration, Management & Accounting Practices, Sponsored Programs Administration, and Systemwide Financial Standards & Reporting.

## Task or Duties:

- Provide advice to the Chancellor, Executive Vice Chancellor/CFO, Chancellor's Office Executive Staff, and campus Business/Administration Vice Presidents and Assistant Vice Presidents on all financial matters within the scope of Financial Services.
- Formulate policies, procedures, and regulations within the Financial Services areas with focus on supporting and enabling campuses while maintaining compliance.
- Liaise on financial matters with the 23 campuses, the legislature and administration of state government, and other segments of higher education.
- Direct the development of systemwide financial reports for both legal-basis and GAAP reporting, which includes presentation to the Board of Trustees, management of the independent financial audit firm, and providing assistance to campuses, as requested.
- Oversee fund accounting for both System and Chancellor's Office activities, including upgrades to and training on software.
- Develop, implement, and monitor financial processes and procedures applicable to the operation of the Chancellor's Office and system wide programs, including financial chart of accounts, financial reporting of GAAP and legal-basis, manuals, and tables (FIRMS and PeopleSoft).
- Serve as primary liaison with Information Technology Services on use and management of the Oracle/PeopleSoft software for financial systems, including coordination on timing of updates, integration of ancillary systems and other emerging issues.
- Oversee the training function for campus staff within the Financial Services area.
- Interface with the executive committee of the CSU Auxiliary Organization Association as needed.
- Work closely with the Assistant Vice Chancellor for Budget to develop strategies for compliance with emerging legislation and reporting issues. Also work closely with the AVC of Financing and Treasury.
- Work collaboratively with the AVC/Chief Procurement Officer to implement and support procure-to-pay (P2P) by aligning goals, improving efficiency, and mitigating risk for such activities as management of suppliers, cash flow and payments.
- Work closely with the Vice Chancellor, Audit and Advisory Services and staff for Board of Trustee items.

## Candidate Qualifications

### Education/Certification

- Bachelor's degree in business or related discipline.
- An MBA or CPA is preferred.

### Knowledge and Work Experience

- Extensive experience in a multi-faceted, complex organizational environment with both central and decentralized operations is preferred.
- Demonstrated experience/knowledge of financial management software systems is preferred.
- Public sector experience is preferred.

## The Community

### Long Beach, California

Located in the heart of Southern California, Long Beach (pop. 463,218) blends the urban sophistication of a big city with the relaxed atmosphere of a beach resort. Residents and visitors will discover diverse hotels, world-class attractions, cutting-edge museums, award-winning restaurants and a thriving, multi-faceted arts and culture scene. Bordered by the Pacific Ocean, with 5.5 miles of sandy beach front, plus miles of inland bays and waterways, Long Beach basks in the warm glow from their year-round California sun.

With its seaside walkways and waterfront marinas, Long Beach has set the standard for "walkability" and is an ideal spot for strollers and bikers alike. Downtown Long Beach has an array of stores and over 100 restaurants within an eight-block area. The city is also home to several eclectic museums including the Long Beach Museum of Art and the Museum of Latin American Art.

The city's East Village Arts District includes one-of-a kind art galleries and shops. In addition, just three miles from downtown is Belmont Shore and 2<sup>nd</sup> Street, the quintessential beachfront community. Long Beach is located near famed attractions such as the Queen Mary, Disneyland, Aquarium of the Pacific, Catalina Island, and more.

To learn more, please visit: <http://www.visitlongbeach.com>

## Procedure for Candidacy

Please direct all nominations, and applications to Ben Haden and Melinda Morton, through the WittKieffer Candidate Portal by clicking [here](#). Candidates can also find this portal via the WittKieffer website at [www.wittkieffer.com](http://www.wittkieffer.com) and selecting the "Become a Candidate" button. If you have trouble logging into the portal or have additional questions, please contact Ben Haden and Melinda Morton directly preferably via e-mail at [CSUAVCController@wittkieffer.com](mailto:CSUAVCController@wittkieffer.com)

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

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