

SEARCH PROSPECTUS:

Assistant Vice President for Budget, Planning,
and Analysis/University Budget Officer



Channel Islands

CALIFORNIA STATE UNIVERSITY

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California State University Channel Islands (CSUCI) invites confidential inquiries, nominations, and applications for the position of Assistant Vice President for Budget, Planning and Analysis/University Budget Officer. The AVPBPA serves in a key strategic capacity reporting to Ysabel Trinidad, the

Vice President for Business & Financial Affairs and Chief Financial Officer, and is charged with building and maintaining a best-in-class financial planning and analysis organization that supports the University's decision-making with timely, accurate, and transparent data.

THE UNIVERSITY AND ITS MISSION

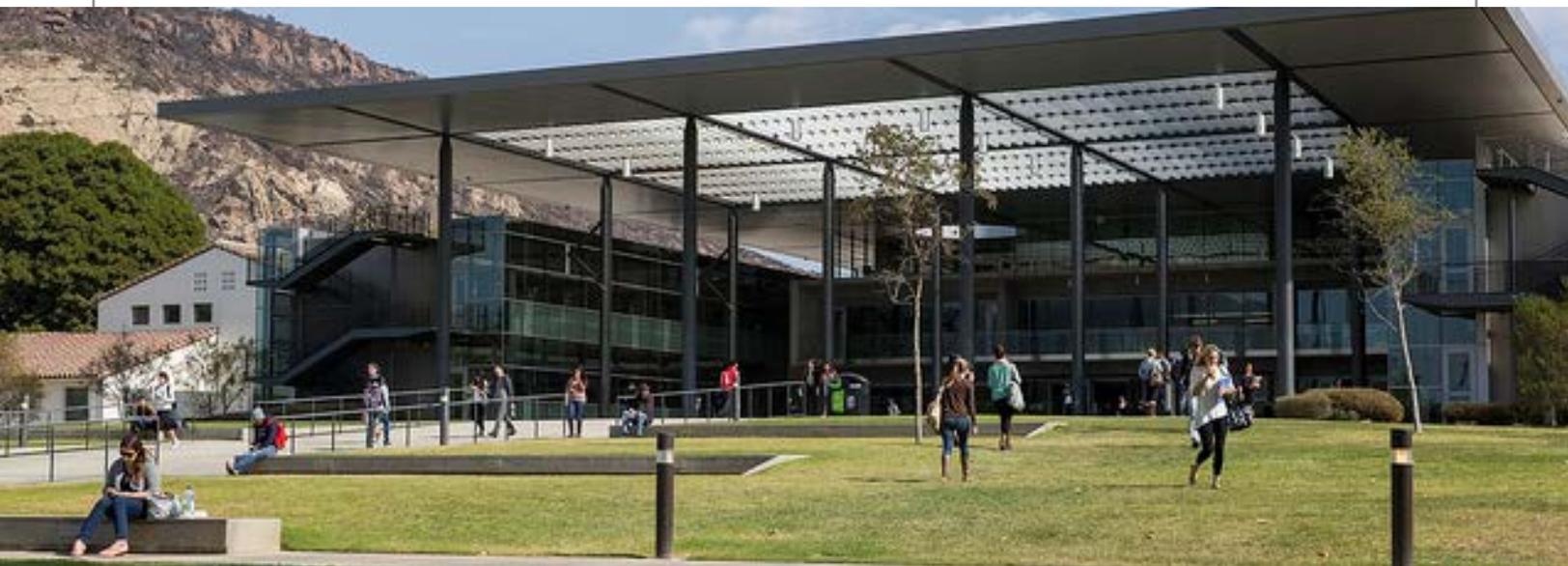
Founded in 2002, [California State University Channel Islands \(CSUCI\)](#) is the newest campus in the 23-campus California State University system, the largest public university system in the U.S. The University is located halfway between Santa Barbara and Los Angeles and is 10 minutes from the Pacific Ocean. The mission of the CSU includes preparing significant numbers of educated, responsible people to contribute to California's economy, culture, and future. The original buildings on the CSUCI campus date from 1934 and President Franklin D. Roosevelt's New Deal. The campus itself represents a forty-year effort to bring a four-year public university to the region to serve its residents.

According to the most recent data, CSUCI has over 1,600 employees. The current student body is 50% Hispanic, 49% Pell Recipients, and 59% first-generation college students. Over half of the undergraduates are transfers

from community colleges. Graduate and credential programs are designed to meet the needs of working adults. In short, the CSUCI student body reflects the people of the region and of California.

MISSION STATEMENT

Placing students at the center of the educational experience, California State University Channel Islands provides undergraduate and graduate education that facilitates learning within and across disciplines through integrative approaches, emphasizes experiential and service learning, and graduates students with multicultural and international perspectives.



ACADEMICS

California State University Channel Islands graduated its largest class yet in Spring 2018. Overall, CSUCI now enrolls more than 7,000 students, including nearly 300 graduate and post-baccalaureate students, at its main campus and three satellite campuses. CSUCI offers 27 undergraduate majors, 7 graduate degrees, a joint doctorate in educational leadership, and a variety of certificate and teaching credential programs ([information on all programs](#)). The Division of Academic Affairs includes:

- [Arts and Sciences](#) includes undergraduate majors and minors in 20 disciplines across the arts, humanities, sciences, and social sciences. The interdisciplinary nature of A&S programs uniquely prepares students to make significant contributions in the 21st century. The School is dedicated to providing undergraduate students research experiences and opportunities to engage in community service and experiential learning. CI offers a wide variety of excellent programs and classes as well as a number of exciting international learning experiences.
- [The School of Education](#) builds on the foundations of the undergraduate Liberal Studies option in Teaching and Learning, the undergraduate Early Childhood Studies program, and academic majors in biology, English, mathematics, history, and social studies, and extends to the Masters of Arts in Education. The School's programs contribute to the education profession by producing teachers and school administrators who believe that all students have the ability to achieve high standards, who adapt their teaching to reach all students, and who respect the diversity of all students. These graduates are reflective about their teaching, their attitudes, and their ability to work in collaborative analytical teams.
- [The Martin V. School of Business](#) and Economics has a liberal arts and

interdisciplinary focus. It is built on the five Cs: critical thinking, collaboration, communication, conduct, and competencies. Students learn the fundamental principles of accounting, economics, finance, information systems, management, and marketing as applied in a variety of organizational settings. A distinguishing aspect of the Business and Economics Program is the requirement to take courses developed in conjunction with disciplines outside the traditional business curriculum.

- [Extended University](#) responds to important needs in the community for continuing access to higher education and provides overall support for the University's commitment to lifelong learning. Extended University serves individuals throughout their career life cycles, especially as working professionals and busy adults, with job skills training, career upgrades, professional certifications, and accelerated courses of study in accessible formats at convenient times and locations. The Osher Lifelong Learning Institute, a hallmark program for mature learners, has enriched the intellectual life of the community since its inception in 2004.
- [The John Spoor Broome Library](#) enhances the CSUCI mission of interdisciplinary, international, multicultural, and service learning by planning and promoting the use of collections and services and supports student learning via its robust information literacy program. The Library's mission is to enhance CSUCI's mission through active collaboration with students, faculty, and staff in developing its range of services.

At the present, CSUCI is poised to continue to grow in size and renown, while maintaining one of the most thoroughly student-focused learning environments in public higher education. CSUCI embeds its mission in faculty-led and directed [Mission Centers](#): the Center for Community Engagement, the

ACADEMICS (cont.)

Center for International Affairs, and the Center for Multicultural Engagement. Other institutes reflecting partnerships with the community, an entrepreneurial spirit, and a penchant for innovative learning environments include the California Institute for Social Business, the Henry L. “Hank” Lacayo Institute for Workforce and Community Studies, and the Entrepreneurship & Small Business Institute.

CSUCI prides itself on a pattern of identifying student and community needs, finding resources, and building programs to address those needs: indeed, this is the pattern begun during the 40-year effort to bring a public four-year university to the region. Two initiatives illustrating this pattern are outlined below:

- CSUCI continues to investigate and address issues affecting retention and academic success. This has led to garnering resources, primarily through grant-writing, to develop interventions. For instance, First Year Experience (FYE) integrates multiple high-impact practices: thematic critical thinking First Year Seminars taught in Learning Communities with writing-intensive English composition classes, supported by embedded peer mentors who facilitate small co-curricular Dolphin Interest Groups (DIGs) aimed at facilitating the transition to university life.
- [Student research](#): Faculty have engaged undergraduate students in research activities since the first years of the university, marked by the success of CSUCI teams in the CSU Student Research Competition. In 2008 the first Student Research Symposium was celebrated; this grew into CSUCI's annual [Sage Student Research Conference](#): the 10th annual conference in 2018 featured research presentations by 450 students who had been guided by 50 faculty mentors. CSUCI is now known for fostering research opportunities for undergraduate as well as graduate students. For instance, a unique partnership between the National Park

Service and the University is seen in the [CSUCI Santa Rosa Island Research Station](#), providing students, faculty, researchers, and the local community with resources and opportunities to engage in natural and cultural resource-based research and education.

CSUCI's pattern of identifying need, securing resources, and building programs is further exemplified by the University's embrace of CSUCI's Hispanic-Serving Institution designation, first achieved in 2010.





STUDENT-CENTERED LEARNING AND STUDENT ACTIVITIES

CSUCI is a student-centered university, committed to academic excellence, civic engagement, environmental responsibility, and leadership. The student to faculty ratio is 21:1 with 162 Tenure Track faculty and 311 lecturers. With a singular commitment to student success, CSUCI strives for innovative practices and excellence within the disciplines and welcomes students as active partners in a distinctive education experience. CSUCI seeks students who enjoy a campus environment where their voices and beliefs are embraced, valued, and respected. Students are educated to think critically, work in teams, and tackle problems in their community and the real world using interdisciplinary approaches.

Students are embedded in the classroom as peer mentors in a variety of contexts. They conduct meaningful discussion, research, and exploration, and work closely with expert lecturers and tenure-track faculty to make a difference. CSUCI aims to graduate students possessing an education of sufficient breadth and depth to appreciate and interpret the natural, social, and aesthetic worlds, and to address the highly complex issues facing societies.

To learn more about why students choose to enroll at CSUCI, visit www.csuci.edu/about/get-to-know-ci/why-ci.htm.

DISTINCTIVE ASPECTS OF CSU CHANNEL ISLANDS

As the youngest campus in the CSU system, CSUCI has the unique responsibility of creatively fostering the growth in campus facilities needed to reach a target student body size of 15,000. The campus leadership has embraced a model of public-private partnerships: a recent example is the sale of the University Glen apartments and Town Center to a global real estate investment company. Another reflection of the long-standing community desire for and support of a public university is the engagement of the civic and business community. [University Advancement](#) and others cultivate relationships with those interested in supporting the University in a variety of ways, as demonstrated by the membership of individuals on the CSUCI Foundation Board. Some distinctions not mentioned earlier in this profile include the following.

- The University:
 - » Placed on the President's Higher Education Community Service Honor Roll for six years.
 - » Ranked by the nonprofit Washington Monthly as the "Best Bang for the Buck – West" in 2018, which recognizes colleges and universities that help non-wealthy students attain marketable degrees at affordable prices.
 - » Ranked among Top 25 Public Universities (West) by U.S. News & World Report in 2018.
 - » Recognized as a Tree Campus USA for a sixth time in 2018.
 - » Ranked CSUCI's Nursing Program 12th best in the state by RegisteredNursing.Org.
 - » Ranked 9th safest campus in the country by CollegeStats.org.
 - » Named a "Military Friendly School" by G.I. Jobs magazine three times.
- » Created two "Z-Majors," which are majors that use quality, free, and readily available educational resources, thus eliminating the costs of textbooks associated with their majors. CSUCI is the first in the CSU System to develop undergraduate "Z-Majors."
- » Generated a total of \$296.8 million in economic output for the County and \$517.2 million in California for 2016 (most recent data).
- » Re-accredited in 2015 by the Western Association of Schools and Colleges through 2024.
- Faculty and students:
 - » Collaborative faculty-student research projects consistently win awards at both the state and national levels.
 - » Students repeatedly dominate the top awards at the CSU Media Arts Festival.
 - » Faculty have been recognized with national awards for college-level teaching, authorship, and service to their disciplines.
 - » Faculty are active in grant-writing: representative grants awarded include several HSI grants and multiple NSF Noyce, CAREER, Climate Change, and REU grants as well as grants awarded by foundations and regional entities.
 - » Students have won Goldwater Awards, REU placements, admission to prestigious graduate programs, and employment with desirable companies.
 - » Students contributed over 40,000 hours to the community through research and other [service](#) in 2017–2018, representing an economic benefit of more than \$1,200,000 to the community.

THE CAMPUS AND THE REGION

CSU Channel Islands is located in Ventura County, midway between Los Angeles and Santa Barbara on the Southern California coast. The campus sits on the eastern edge of the Oxnard Plain, nestled in the western hills of the Santa Monica Mountains – 10 miles from the Pacific Ocean – a vibrant area at the interface of urban, agricultural, and coastal California.

The main campus is a unique historical site. The original Spanish mission-style buildings date from 1934 and President Franklin D. Roosevelt's New Deal. When classes began in 2002, the campus was a 634-acre facility, with one- to two-story buildings organized around two primary quads. CSUCI saw remarkable physical growth during its first decade, doubling in size to over 1,200 acres and completing more than \$233 million in building and renovation projects.

University Glen, an adjacent housing community on the east end of campus, offers apartments, town homes, and single-family residences available for rental or purchase. Many University administrators, faculty, and staff make the University Glen their home. [The University Glen Town Center](#), also located in the Glen, houses over 100 juniors, seniors, and

graduate students in studio, one-bedroom, and two-bedroom apartments, and is home to the University bookstore and various eateries.

For a virtual tour of campus, visit www.youvisit.com/csuci.

CSU Channel Islands' location provides a plethora of educational and recreational opportunities. From the main campus in Camarillo, an hour's travel by car or train brings one to the dynamic global city of Los Angeles, with its world-class museums, restaurants, performing arts offerings, and diverse communities. Santa Barbara lies less than an hour in the opposite direction. CSUCI itself is ten minutes from downtown Camarillo. The University is set on rich agricultural land surrounded by lemon groves and strawberry and raspberry fields. Nearby features include biotech and other technology-oriented companies, a thriving arts scene, a military base, a working harbor, extensive agriculture, and world-class coastal and mountain recreation. The University has developed long-term relationships comprising everything from joint research projects to community-based service learning opportunities with several sectors of the region.



ASSISTANT VICE PRESIDENT FOR BUDGET, PLANNING AND ANALYSIS/UNIVERSITY BUDGET OFFICER

Serving as the University Budget Officer, the Assistant Vice President for Budget, Planning, and Analysis plays a critical and strategic cross-campus role. Under the general direction of the Vice President for Business & Financial Affairs/Chief Financial Officer, the AVPBPA:

- Advises senior University leadership regarding the allocation of resources that most effectively supports the academic and administrative priorities of CSUCI. Develops business plans, pro-forma financial projections, complex financial analyses, and multi-year forecasts that reveal key drivers of economic value and provide critical support for achievement of the University's strategic objectives.
- Manages the financial planning cycle for the University to include: University Strategic Resources Planning Committee support; collaborates with the operating units to develop the annual budget; provides advice for those units on ways to reduce or reallocate expenses and diversify revenue streams; develops forward budgets that account for the full impact of multi-year initiatives; and engages in reporting that clearly communicates budgeting decisions and ongoing progress toward budget goals.
- Collaborates with a broad array of community members to establish a consistent and effective way to communicate the links between strategy, financial planning, and budgetary decisions. Assesses the disparate information needs of CSUCI's diverse community and educates the community about budget methods and practices to increase transparency and understanding.
- Leads and manages budget, planning, and analysis staff by recruiting, developing, and retaining individual staff members. Develops succession plans, supports cross training, and promotes broader participation in Business & Financial Affairs Division initiatives and activities. Participates actively on the Business & Financial Affairs Division management team to enhance the work environment and the Division's contribution to the University's mission.
- Staffs, chairs, or serves on University committees as requested; and represents CSUCI to external parties as appropriate.

QUALIFICATIONS

The next AVPBPA must possess the following qualifications:

- A Bachelor's degree is required with a preference for an accounting, finance, or business major. An MBA and/or CPA is strongly preferred.
- A minimum of ten years of progressively responsible budget, analysis, reporting, planning, and operational management experience in higher education, or a comparably complex not-for-profit organization. Applicants with other types of experience should demonstrate their suitability for this position.
- Experience supervising finance and accounting professionals; demonstrated experience with development of complex financial analyses that support strategic decision-making; experience as a user and developer of budget and other financial systems, analytical tools, and databases with a preference for individuals with Peoplesoft and Hyperion familiarity.

ASSISTANT VICE PRESIDENT FOR BUDGET, PLANNING AND ANALYSIS/UNIVERSITY BUDGET OFFICER (cont.)

- An ability to evaluate different budget models and practices and determine their utility within the context of an individual organization's facts, circumstances, and strategic direction.
- A strong commitment to promoting diversity and inclusion in the Business and Financial Affairs Division.

Preference will be shown for a leader who has distinguished themselves through professional organizations, conference presentations, or publications; outstanding written and verbal communication skills, including the ability to create presentations that effectively convey complex information to a diverse array of University constituents; excellent analytical and creative problem-solving skills; well-developed interpersonal skills, emotional intelligence, and judgment; and demonstrated leadership ability with a record of success working with people at all levels of a rapidly changing and complex organization.

A background check (including a criminal records check) must be completed satisfactorily before any candidate can be offered a position with the CSU. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for the position.

The person holding this position is considered a "mandated reporter" under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.



APPLICATION AND NOMINATION PROCESS

The University is being assisted by Academic Search, Inc. Applications should consist of a substantive cover letter, a resume or curriculum vitae, and a list of five professional references with full contact information. No references will be contacted without the explicit permission of the candidate. Applications, nominations, and expressions of interest can be submitted electronically, and in confidence, to:

CSUCIAVPBPA@academic-search.com.

The position is open until filled but only applications received by November 26 can be assured full consideration. Confidential discussions about this opportunity may be arranged by contacting consultants Ann Die Hasselmo at Ann.Hasselmo@academic-search.com and Chris Butler at Chris.Butler@academic-search.com.

CSUCI is committed to recruiting individuals who are dedicated to furthering inclusive excellence in our campus community. We seek to enhance our diverse University population, welcoming people from all backgrounds, to sustain an environment in which all can thrive, create, work and learn. A background check (including a criminal records check) must be completed satisfactorily before any candidate can be offered a position with the CSU. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for the position. The person holding this position is considered a 'mandated reporter' under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.



ABOUT ACADEMIC SEARCH

Academic Search, Inc. is assisting California State University Channel Islands in this work. For more than four decades, Academic Search has offered executive search services exclusively to institutions of higher education. Academic Search was founded on the principle of strengthening higher education leadership through professional search services. We are the only search firm in the nation with a formal relationship to a premier leadership development program. As the subsidiary of the American Academic Leadership Institute (AALI), Academic Search provides substantial financial support to a number of leadership identification, development, and support programs across all sectors of public and private higher education. For more information, visit <http://www.academic-search.com/>.

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