

**Palo Alto University
Vice President of Business Affairs & Chief Financial Officer**

Palo Alto University is searching for a Vice President for Business Affairs & CFO who will bring strategic, entrepreneurial, and visionary leadership to its business operations to support its mission of providing outstanding training to the next generation of mental health professionals.

The new Vice President for Business Affairs & CFO (VP-CFO) will support Palo Alto University's efforts to be a driving force in addressing pressing and emerging issues in the fields of psychology and counseling to equitably meet the needs of today's diverse communities.

[Palo Alto University](#) (PAU) is a private, non-profit university located in the heart of Northern California's Silicon Valley. As it approaches its 50th year of operations, PAU has developed, and is pursuing, a new strategic plan built on a foundation of inclusive excellence. The pandemic has shone a bright light on the need for research, teaching, and clinical training to support the significant rise in mental health challenges in our communities. PAU prepares well-trained, well-prepared, and culturally aware mental health professionals to meet those challenges. PAU's alumni are in leadership positions in their fields throughout the country and internationally.

In 2021 alone, PAU students provided over 80,000 hours of clinical service hours to the community in 169 unique sites in California and beyond. PAU's in-house training clinic, the Gronowski Center, saw over 400 clients in nearly 13,000 visits (this year, primarily via tele-therapy). Services were provided to those with a range of mental health challenges and include specialized services through the Clinica Latina (in Spanish), the Sexual and Gender Identity Clinic, and the E-Clinic which has been supporting youth in college-bridge programs for first-generation college students in their transition to college. In addition to its doctoral and master's programs, PAU serves a small but talented group of undergraduates completing their last two years of college; and through its Continuing and Professional Studies Division last year enrolled over 6,000 mental health professionals in more than 43,000 hours of professional training. PAU is designated both a Hispanic-serving and an Asian Pacific Islander-serving institution.

As PAU continues to strengthen its position as a thought-leader in training, education, and research in psychology and counseling, the VP-CFO will deploy strategic financial management strategies, evaluate and make recommendations to strengthen existing programs, leverage innovation for new business opportunities/initiatives, and build community partnerships and other tactics to support the financial health of the institution.

The VP-CFO should have a growth and innovation mindset and be grounded in pragmatism, serving as a strategic financial and planning partner to the President, Board of Trustees, Cabinet, and the PAU community. The VP-CFO leads the Business Affairs division, a group of strong professionals who execute a diverse mission set for the ongoing operation of the university. This position is responsible for the management of the business office, and provides oversight for facilities, information technology, business development, and capital projects.

The primary responsibilities and opportunities for the VP-CFO include:

Support the mission of Palo Alto University through sound fiscal strategy, analysis, management, and planning

As a critical member of PAU's Cabinet, the VP-CFO will:

Lead financial strategy, analysis, comprehensive risk management, and planning to create budgets that reflect institutional priorities and navigate the necessary tradeoffs associated with financial discipline and investments in new priorities.

Provide thoughtful and forward-looking counsel in leadership deliberations based on technical attention to detail and the capacity to think in creative and entrepreneurial ways to serve the institution.

Bring strategic vision to the division's plans for technology, facilities, space planning, and resource allocation development.

Provide exceptional leadership, coaching, and professional development opportunities to the division's leadership team.

Provide strategic oversight of the use, management, and maintenance of PAU's existing facilities to align with the university's strategic plan to deliver a safe, comfortable, and productive learning and work environment.

Guide capital projects, including space planning, coordinating moves, interfacing with architects and engineers as well as partnering with the Director of Board and Presidential Operations to support the Board's Future Facilities Task Force to think strategically about PAU's future space needs.

Support and collaborate with the Director of Human Resources and assist in the design, implementation, and timely calculations of wages, incentives, and salaries.

Steward Palo Alto University's resources and develop new business opportunities

The VP-CFO will work diligently to safeguard and advance PAU's financial health. The VP-CFO will skillfully manage the university's finances, including the development of optimal debt strategies, and assist relevant Board committees in the development of endowment management, spending policies, and investment strategies for cash and short-term investments. Through strategic financial planning, the VP-CFO will maximize the deployment of resources to support strategic planning priorities and preserve financial health and strength over the long-term.

As a member of the Cabinet and charged with developing the approximately \$35M annual operating budget, the VP-CFO will partner closely with the Provost/Vice President of Academic Affairs and other Cabinet officers on institutional planning and positioning, forging community partnerships, and in advancing PAU's presence in the region, state, and nation.

The VP-CFO serves as liaison to external auditors, the Finance & Risk Management and Audit Committees of the Board of Trustees, and other accrediting and compliance agencies as required.

The VP-CFO will engage actively in PAU's development efforts by collaborating with current and prospective donors to speak to the University's vision and strategy to inspire confidence in the University's fiscal management.

PAU is working to grow its partnerships and ongoing community engagements and the VP-CFO will play a key role in supporting the Provost and academic departments in developing effective strategies and models. In 2018, PAU acquired a small professional studies company (now PAU's Continuing and Professional Studies Division) and has expanded its business model to include post-graduate training. PAU offers over 300 courses, seven certificates, and many other resources to professionals. The VP-CFO will partner with the VP for Continuing and Professional Studies to maximize business strategy and support an ambitious growth plan for the division.

Support Palo Alto University's efforts to enact the Inclusive Excellence framework underlying its strategic plan

The VP-CFO will bring a deep understanding and demonstrated commitment to the principles and benefits of diversity, equity, and inclusion. The VP-CFO will meaningfully contribute to PAU's goals to recruit and retain a diverse student body, faculty, and staff, and identify ways to improve the sense of belonging for all members of the community. In particular, the VP-CFO will develop and recommend financial strategies and policies supporting these efforts.

It is essential that all members of the PAU community understand and are motivated by the links between PAU's budgeting and financial priorities and its strategic plan. The VP-CFO will present and communicate complex financial concepts clearly to a range of stakeholders – from the senior team, Board, and external partners, to faculty, staff, students, parents, and alumni.

Internally, the VP-CFO will create and maintain dashboards and reports to inform the community of financial opportunities and challenges, and communicate PAU's financial position transparently to a range of constituents.

Ideal Experience and Characteristics

Palo Alto University is searching for a senior finance administrator who has been effective in mission-driven organizations. An understanding of higher education finance and trends in higher education is desirable but not required. PAU welcomes candidates with relevant experience in other settings whose intellectual vitality, strategic capabilities, collegiality, and expertise indicate a capacity to serve PAU as its next VP-CFO. While no single candidate will possess all the below qualifications, the ideal candidate will have the following range of experience, characteristics, and qualifications:

LEADERSHIP EXPERIENCE & QUALIFICATIONS

- A track record of outstanding management of people, a commitment to professional development and a growth mindset; demonstrated ability to manage, empower, and support staff; an effective delegator; ability to define and implement effective management structures and systems, establish and uphold high performance standards, and sustain a culture defined by inclusive excellence.
- Demonstrated experience in thinking strategically about and managing business operations, including payroll and student-facing financial offices, the IT infrastructure and operations, deployment of resources, and management and maintenance of facilities.
- Demonstrated experience as a strategic thought partner to the President, senior team, and Board. Experience working collaboratively in an environment of shared governance; a demonstrated ability to forge mutually respectful relationships and strong partnerships across the university and the broader community.
- Demonstrated capacity to communicate broadly across an institution; the ability to convey and teach technically complex information and concepts in accessible terms to a wide array of stakeholders.
- Proven ability to develop, recommend, and implement financial and operational strategies including comprehensive risk assessment, management, and mitigation. Extensive experience in computerized fiscal and business operations and the ability to develop and present sophisticated financial models.

- A demonstrated record of progressive responsibility in the supervision of planning/modeling, financial management, and control functions at the senior level, including the audit and budget preparation process with complex budgets.
- Experience in or knowledge of nonprofit accounting, including contract and grant accounting and revenue recognition issues; knowledge, experience, and application of GAAP; background in managing general accounting, budgeting, and planning, procedures and controls, and analysis and reporting.
- A proven track record of commitment to diversity, equity, and inclusion.
- Demonstrated success in improving operational efficiencies and utilizing metrics to evaluate performance and improvements over time.
- A Master's degree or equivalent in business, finance, or a related field.

CHARACTERISTICS & APTITUDE:

- A strong belief in the mission of Palo Alto University and a commitment to continuous, measurable improvements to PAU's business affairs operations.
- Demonstrated willingness to participate in the ongoing work to further develop and sustain a highly effective senior leadership team in service to PAU.
- Ability to motivate others to change embedded structures and behaviors enabling better collaboration and systems; experience in developing constituents and support among people with different priorities; an understanding of the tools required to encourage and manage institutional change including execution of strategic plans, identification and implementation of best practices, implementation of incentive and reward programs; experience working in a shared-governance environment would be an advantage.
- A creative and entrepreneurial spirit.
- Strong interpersonal skills, including humility, unimpeachable integrity, a strong moral compass, and a commitment to transparency.
- A collaborative, consultative, and data-driven approach to decision-making; a strategic and creative solution-seeker with the ability to make difficult decisions, provide the rationale for the decision, and facilitate alignment.
- Outstanding oral and written communication skills, including the means to address issues clearly and in non-confrontational and non-polarizing ways to a range of diverse audiences, but with determination.
- Comfortable receiving input from many sources and able to analyze and formulate disparate information into sound, well-organized plans; ability to garner necessary support and reshape ambiguous situations so that concrete action can be taken.
- Emotionally mature with flexibility and sensitivity to work with diverse personalities and situations.

About Palo Alto University

Palo Alto University is a private, non-profit university in the Silicon Valley that is at the forefront of psychology and counseling. PAU was founded in 1975 as the Pacific Graduate School of Psychology (PGSP), an independent, professional school and was re-incorporated as a University in August 2009. PAU has been continuously accredited since 1986 by WASC. PAU's doctoral programs are accredited by the American Psychological Association (APA) and its master's in counseling programs are accredited by the Council for Accreditation of Counseling & Related Educational Programs (CACREP). PAU offers an undergraduate degree and a master's in psychology for students who may go into the field of mental health or use their psychology foundation in business, in teaching, in technology, or other professions.

The PAU community is grounded in values of social justice and dedicated to addressing pressing and emerging issues in the fields of psychology and counseling that meet the needs of today's diverse society. PAU offers undergraduate and graduate programs with online, hybrid and residential options. An engaged faculty, who make significant contributions to their fields and thrive as teachers and mentors, prepare practitioners, researchers and leaders through rigorous educational programs, research, extensive hands-on clinical practice opportunities, and outstanding professional training for mental health professionals. When you put all of this together, PAU creates a legacy of confident, competent, and compassionate professionals who are at the forefront of psychology and counseling and make a difference every day in the lives of others.

In 2016, Palo Alto University hired President Maureen O'Connor, a dynamic, collaborative leader who led the academic reorganization of PAU's programs and the organizational structure of the university, improved integration of the bachelor's completion program, delivered on the promise of greater equity between the disciplines, and has ignited a spirit of innovation and evolution. In 2021, the university hired Provost Erika Cameron, a strategic academic leader who understands the potential of PAU's location in Silicon Valley and its positioning at the forefront of training and practice in psychology and counseling. This year, the Board of Trustees, President, and Cabinet, with input from the university constituents, developed a strategic plan grounded in an inclusive excellence framework and built on five pillars: Academic Excellence; Student Success; Operational Excellence; Awareness; and Financial Strength.

Palo Alto University has many collaborative partnerships with community organizations and institutions, including Stanford Department of Psychiatry, the Department of Veterans Affairs, Community Health Awareness Council, LifeMoves, and other mental health care organizations. PAU's Gronowski Center teaching clinic delivers low-cost mental health services to the local community while also providing valuable, supervised training to PAU graduate students. In addition, PAU sponsors several academic research centers devoted to trauma, child mental health, evidence-based care for LGBTQ clients, excellence in diversity and community care, and technology and mental health.

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