



# CAL POLY

## **Search for the Senior Vice President for Administration and Finance**

California Polytechnic State University, San Luis Obispo  
San Luis Obispo, CA

California Polytechnic State University, San Luis Obispo (Cal Poly) seeks an experienced senior administrator with an excellent record of strategic leadership and operational management. The successful candidate will be inspiring, entrepreneurial, and have a collegial style. As the chief fiscal officer of the University, with executive responsibility for ensuring quality administrative and fiscal services, the Senior Vice President (SVP) reports directly to the university president for all matters related to the management and oversight of the business, operations and financial affairs of the university. The SVP is responsible for the implementation of all fiscal policies and regulations; the fiscal oversight of the university's auxiliary organizations (Cal Poly Corporation, Associated Students Inc. and Cal Poly Foundation); and developing and supporting a quality service orientation and ethic within their areas of responsibility. These areas of responsibility include: financial services, accounting and university budget and planning; campus-wide information technology services; contract and procurement services; real estate; capital project planning, design and construction; facility maintenance; internal audit; mail and distribution services; risk management; administrative compliance services; public safety (university police, emergency management and transportation services); the Cal Poly Corporation; and the Performing Arts Center. The SVP is responsible for ensuring the sustainability, waste reduction, and stewardship of the natural resources needed for the continued efficient operations of the Cal Poly campus including facilities, campus grounds, energy usage and construction, and facilitating student learn-by-doing opportunities that take advantage of the physical campus.

The SVP, in partnership with the president and executive vice president/provost, shares a major leadership role in defining resource allocation, developing priorities and strategies, and implementing campus-wide budget processes. As one of nine vice presidents, the SVP plays a key role in the development of university policy. The SVP represents and acts for the president on matters of established financial policy within the university and the California State University system, and they accept specific delegations and assignments requiring coordination at the senior administrative levels.

The SVP will join the Cal Poly community during a critical time of transition and expansion, with a prime opportunity to make a lasting impact on the Cal Poly campus, San Luis Obispo and Central Coast communities, and California State University system. Cal Poly has seen significant growth in applications and enrollment in recent years, with more and more students attracted to the polytechnic structure of the institution and the experiential [Learn by Doing](#) philosophy that powers its academic missions. To meet the needs of students and supporters, faculty, and staff, the university is developing new physical resources to accommodate living and learning for all community members. The campus is on a growth trajectory which will include a transition to Year-Round Operations in 2025, with the goal of extending

Learn by Doing pedagogy to a growing student body by maximizing the value campus resources deliver to learners. Also on the horizon is the campus academic calendar transition from quarters to semesters, set to begin in 2026. Leading a talented team of professionals, the SVP will provide critical strategic leadership for financial and administrative operations as Cal Poly further evolves its position as the preeminent campus of the California State University system and seeks creative, yet undiscovered ways to invest in the teaching and learning missions for all students. In working to achieve these goals, the SVP will address the following key opportunities and challenges:

- Provide outstanding counsel and guidance to senior administration in advancing Cal Poly's vision and mission.
- Enable the academic budget process by providing advice, education, and facilitation.
- Orchestrate funding for major planning projects and new services.
- Establish and bolster an office for efficiency and effectiveness.
- Play a leading role in outreach to the city, county, Central Coast region, and state regarding relevant financial and planning initiatives and strategy.
- Lead a complex administrative and financial organization in an era of change.

A list of the desired qualifications and characteristics of the SVP can be found at the conclusion of this document, which was prepared with the assistance of Isaacson, Miller, a national retained executive search firm. All confidential applications, inquiries, and nominations should be directed to the parties at the conclusion of this document.

### **About California Polytechnic State University, San Luis Obispo**

Cal Poly, one of 23 universities in the California State University (CSU) system, was founded in 1901, and is one of only a handful of comprehensive polytechnic universities in the nation, with approximately 22,000 undergraduate, 120 post-baccalaureate, and 700 graduate students. A primarily undergraduate university, Cal Poly offers 64 baccalaureate degrees and 32 master's degrees. Cal Poly is among seven top California schools — and the only California State University campus — to receive 5-star recognition in Money magazine's 2023 Best Colleges rankings, along with 34 other schools including such Ivy League universities as Harvard, Princeton, Yale and Columbia. *U.S. News and World Report* has ranked Cal Poly #1 among public master's universities in the western United States for 31 consecutive years.

Cal Poly is known for its Learn by Doing philosophy. Each year more than 20,000 top-tier students come to San Luis Obispo to put knowledge into action, taking their learning outside the classroom as they prepare for careers in engineering, agriculture, science, business, humanities, and the built environment. Cal Poly's hands-on philosophy, small class sizes and close student-faculty mentorships result in graduates ready from day one to impact their communities, California and the world.

Cal Poly owns approximately 10,000 acres of land, between its San Luis Obispo campus and Swanton Pacific Ranch in Santa Cruz County, making it one of the largest land-holding universities in the nation, and creating deep connections with the California's agricultural industry.

The University is organized into nine divisions: [Academic Affairs](#), [Administration and Finance](#), [Diversity and Inclusion](#), [Strategic Enrollment Management](#), [University Development and Alumni Engagement](#), [University Communications and Marketing](#), [Research](#), [University Personnel](#), and [Student Affairs](#).

### *Academics*

The University is made up of six colleges: [Agriculture, Food & Environmental Sciences](#); [Architecture & Environmental Design](#); [Engineering](#); [Liberal Arts](#); [Orfalea College of Business](#); and the [Bailey College of Science and Mathematics](#). Two-thirds of the university's students major in agriculture, architecture and environmental design, business, or engineering. There are programs in all the colleges that rank among the top in the nation, including the #1 undergraduate Architecture program in the nation.

At the heart of all that Cal Poly values is a core commitment to student success. Cal Poly students graduating with undergraduate or graduate degrees are expected to have met the following learning objectives:

- Think critically and creatively
- Communicate effectively
- Demonstrate expertise in a scholarly discipline and understand that discipline in relation to the larger world of the arts, sciences, and technology
- Work productively as individuals and in groups
- Use their knowledge and skills to make a positive contribution to society
- Make reasoned decisions based on an understanding of ethics, a respect for diversity, and an awareness of issues related to sustainability

Cal Poly is accredited by WSCUC/WASC, and 30 Cal Poly programs are accredited by national professional associations. Cal Poly has a deep commitment to Learn by Doing and educating undergraduate and master students. In pursuit of this and ensuring that faculty remain top in their fields, Cal Poly supports the integration of teaching and scholarship into the faculty experience. An important goal is to increase the institution's capacity for research, scholarship and creative activities, which Cal Poly approaches by celebrating the teaching and scholarship of its faculty. Over the past three years, Cal Poly has administered an average of \$28 million in external funding annually in support of research, scholarship and creative activities; curriculum development and improvement; community service activities; and student-support programs. A hallmark of faculty scholarship is the extensive involvement of students, particularly undergraduates. In every college there is even greater untapped capacity for grants and fundraising due to the outstanding polytechnic focus in each college and strong connections to industry needs. The

university benefits from active and experienced advisory boards at the presidential, college, and departmental levels, with hundreds of industry, community, and educational leaders serving.

#### *Current Context*

In October 2021, the university began the process of converting from a quarter calendar to a semester calendar system. This transition will occur at the start of the 2026-2027 academic year. The conversion is an opportunity to enhance university efficiency and effectiveness. After Cal Poly converts to a semester calendar, the entire California State University (CSU) system of 23 campuses will be on semesters.

Enrollment at Cal Poly is expected to grow in the coming years to support CSU system goals and to align with system-wide financial incentives while meeting or exceeding Governor Newsom's funding [compact](#) goals. The most recent [campus master plan](#) calls for growing maximum student head count on-campus during any term to about 25,000 students by the year 2035. This growth includes leveraging a new summer term for year-round operations. Beginning in the 2024-2025 academic year, new students will be able to opt into starting at Cal Poly in the summer of their first year and spending a second summer on campus in a later year, agreeing to spend two typical academic terms off-campus and engaged in a High-Impact Practice. This should allow Cal Poly to increase total enrollment to closer to 30,000 FTE, while keeping headcount in any given term at the 25,000 level.

To learn more about Cal Poly, please visit: <http://www.calpoly.edu/>. To learn more about the California State University system, please see Appendix I.

#### **About Jeffrey D. Armstrong, President**

Cal Poly is led by [President Jeffrey D. Armstrong](#), the university's ninth permanent president. President Armstrong is both a beneficiary of the wise investments of his predecessors and a visionary president who has overseen an ongoing transformation of the university. Since his tenure began in 2011, on-campus student housing has grown by 25%, with another 33% of growth (compared to 2011) scheduled over the next decade. He has also overseen the increasing diversification of the student body, with the number of first-year students who identify as under-represented minorities doubling between 2011 and 2023. Himself a first-generation college graduate, President Armstrong has especially focused on improving financial aid and lowering the cost of attendance for the students with greatest financial need. He has changed the way Cal Poly funds financial aid, increasing the total amount awarded by approximately \$12 million in 2022-2023 alone, part of a multi-year, permanent funding change that will dedicate tens of millions in additional aid to students in need. During his tenure, applications to Cal Poly have grown by 77%, each entering class for the past five years has set a new school record for their qualifications, and the share of under-represented minority applicants has increased by 75%. Under his leadership, Cal Poly raised both the largest single philanthropic gift to the CSU and also the largest total philanthropic campaign in system history.

Before joining Cal Poly, Dr. Armstrong served as dean of the College of Agriculture and Natural Resources and professor of Animal Science at Michigan State University (MSU), beginning in 2001. He was head of the Department of Animal Sciences at Purdue University from 1997 to 2001 and served in various positions at North Carolina State University (NCSU) from 1986 through 1997.

### **Role of the Senior Vice President for Administration and Finance**

The Senior Vice President for Administration and Finance (SVP) and Chief Financial Officer (CFO) is a member of the university's senior leadership team reporting directly to the president. As the Chief Financial Officer for the university and responsible for fiscal oversight of its three non-profit auxiliary organizations, the SVP advises the President and senior leadership on the development of the University's combined annual budget of approximately \$800 million.

This position will play a significant role as a collaborative leader and strategic partner in shaping the future of Cal Poly as a leading public university. They will pursue an integrated, multi-year financial strategy and maximize use of revenues and funding options in support of the university's strategic plan while ensuring stability and stewardship over those resources to meet the long-range needs of the campus.

The [Administration and Finance](#) division is the steward of Cal Poly's resources, comprising several units that fulfill major operational roles for the University. With an annual budget of \$101.4 million and approximately 650 total staff, Administration and Finance is responsible for the operation and maintenance of nearly six million square feet of space in the 150 major buildings on campus. An organizational chart for the Administration and Finance division can be found in Appendix II.

The SVP's specific areas of responsibility include, but may not be limited to; financial services; accounting and university budget and planning; campus-wide information technology services; contract and procurement services; real estate; capital project planning, design and construction; facility maintenance; internal audit; mail and distribution services; risk management; administrative compliance services; public safety (university police, emergency management and transportation services); the Performing Arts Center; and auxiliary organization compliance and financial oversight.

The SVP has direct-line responsibility for the operations and finances of the [Cal Poly Corporation](#), a recognized auxiliary organization and 501(c)(3) corporation. The Cal Poly Corporation performs certain functions and activities in support of the university's mission as authorized by the Trustees, including providing commercial services such as campus dining and bookstore, faculty staff housing; and provision of administrative services for sponsored programs (component of the Division of Research), and aid-to-instruction programs, to name a few of its major responsibilities. Note that the Cal Poly Corporation will be renamed to Cal Poly Partners in Spring 2024.

The SVP has a primarily oversight role regarding the other two auxiliary organizations. [Associated Students Inc.](#) is Cal Poly's student government, which also operates the Recreation Center, ASI Children's Center

(daycare provider,) and the University Union facility. ASI has an annual budget of approximately \$20 million. The [Cal Poly Foundation](#) is a 501(c)(3) non-profit organization that manages the university's approximately \$275 million endowment, with its own annual budget of approximately \$5 million. In addition, the Foundation supports the university's development division, and dedicates roughly another \$5 million to that activity annually.

In addition, the SVP:

- Manages all fiscal policies and regulations for the university;
- Manages the resource allocation for the campus with specific emphasis on the guidelines set forth by the Western Association of Schools and Colleges (WASC) accrediting agency and CSU policy;
- Serves as a member of the Cabinet; represents and acts on behalf of the president on matters of established policy within the university and the CSU; and serves as acting president when the president and executive vice president/provost are both away from campus;
- Leads and/or participates in various committees or advisory groups, in general, including student fee committees;
- Fosters proactive communication and transparency with all community stakeholders, particularly with regard to student fee funded initiatives;
- Represents the campus in dealings with other universities and with local communities in matters of mutual interest and concern;
- Works collaboratively with the Vice President for University Development and Alumni Engagement in matters where donor funds or other private funds are being solicited and/or utilized for various capital projects, land use development, and campus programs;
- Plays a leadership role in the development of university policy;
- Participates in and facilitates university-wide planning efforts;
- Provides support to and promotes collaboration within the university and its divisions and auxiliary organizations.

The SVP will join Cal Poly at a dynamic time. The university has several major initiatives underway that will require great care and coordination from the SVP:

- Executes a \$1.8 billion capital construction program, including a \$1.2 billion student housing expansion project.
- Operationalizes the Cal Poly Mustang Business Park, a newly acquired off-site office building, that will house approximately 250 staff. These staff will be relocated to the Mustang Business Park in order to repurpose campus space for instructional purposes and planned enrollment growth.
- Develops and executes a multi-phase expansion of faculty staff housing.
- Supports the transition from quarters to semesters starting fall 2026.
- Implements an innovative year around operations academic model that will expand summer enrollment and instruction and provide students with additional opportunities for high impact, off campus experiences as part of their academic experience.

- Leads and coordinates the effective, inclusive, and transparent organizational evolution of the Administration and Finance division to incorporate the new addition of the Information Technology Services unit into its ranks.

### **Key Opportunities and Challenges**

The SVP will be a dynamic leader who will work collaboratively to effectively align and leverage Cal Poly's resources to enhance the student experience, serve the region and state, and facilitate the advancement of the institution's many ambitions. To achieve these goals, the SVP will address the following key opportunities and challenges:

#### ***Provide outstanding counsel and support to senior administration in advancing Cal Poly's vision and mission***

During a time of dynamic change, growth, and vibrant entrepreneurial vision at Cal Poly, the SVP will need to quickly gain the trust of the president, executive vice president/provost, and senior team, who are actively advancing the university. The SVP will play a key partnering and facilitating role in moving forward a number of initiatives, from the funding of new buildings and balancing funding sources to budget allocation processes and decisions. The SVP will maintain a collaborative and consultative environment with regard to financial and administrative matters, where transparency prevails and where excellent information and data work hand in hand with honest feedback and wise counsel. The SVP must provide sound guidance and support to senior administration in focusing and prioritizing among many exciting possibilities, creatively enabling forward movement on the most promising while managing expectations. This challenge will require an astute and savvy professional who can combine an understanding of complex financial issues, flexibility, big vision and excellent judgment with a sense of Cal Poly pride that respects and builds upon strong traditions.

#### ***Enable the academic budget process by providing advice, education, and facilitation***

The SVP will work as a key member of the team for the academic budget process, partnering closely with the provost for planning and prioritization. The SVP will provide support and information for decisions and allocations that impact academic affairs and student success and experience, from workforce issues to graduation rates, to deferred maintenance of facilities. The SVP will advise on budget allocation models and broadly communicate to and be a resource for all parties for transparency and clarity on budget fundamentals, guidelines, and decisions. The SVP will also work with the leaders of the student body on matters related to student fees, and manage and discuss those budgets to address key needs and future demands on its funding capacity.

#### ***Orchestrate funding for major planning projects and new services***



Coming into the role during a time of physical campus growth and enrollment growth alike, the SVP will be at the center of budget and capital funding decisions for major projects that support Cal Poly's mission, including several significant proposed and planned building and land-use projects, programs and services. The SVP will need to understand and coordinate effectively with several key internal and external groups, including the Cal Poly Corporation, Cal Poly Foundation, other Cal Poly auxiliaries, private and public partners, the City of San Luis Obispo and the A&F division to prioritize and finance these projects by leveraging the best and most appropriate sources and mixes of funding over time. This will require a sophisticated entrepreneurial and multi-layered approach to working with a variety of capital sources and players, including public-private partnerships. This work must be done with an eye toward furthering Cal Poly's mission, maintaining fiscal integrity, elevating quality over quantity, and strengthening both external relations and internal processes.

***Establish and bolster an office for efficiency and effectiveness***

Although the university's Administration and Finance division is generally well organized and staffed, there are some places where new programs need to be established. A central task of the new SVP will be to develop an office of efficiency and effectiveness, with a primary focus on reducing operational inefficiencies, enhancing productivity (through the use of technology, where applicable), and fostering a culture of efficiency and continuous improvement within the division and the University. There are several successful one-off initiatives along these lines that can be expanded and unified, and the SVP will lead this critical, cross-cutting organizational effort and the cultural shift.

***Play a leading role in outreach to the city, region, and state regarding relevant financial and planning initiatives and strategy***

The SVP will play a central role in communication with external groups around planning and decisions that have fiscal and other implications beyond the institution in the city, region, and state. This critically includes the relationship between Cal Poly and the broader CSU system. As the largest single employer in the County (and region), and the source of approximately 12% of the regional economy, Cal Poly is also very active in promoting and guiding regional economic development. Although this effort is led by the Associate Executive Director for Economic Development and Special Advisor to the President, the SVP will play a role in these efforts. Alongside the president and other members of the cabinet, the SVP will develop and strengthen external relationships with key stakeholders and uphold the clarity of intentions and information that pertain to successful discussions, negotiations and partnerships. The SVP will play a key role in keeping the CSU and Chancellor informed and updated on fiscal matters and improved business processes, and in making the case for system resources and support for initiatives as necessary.

***Lead a complex administrative and financial organization in an era of change***

The SVP will inherit a mature organizational structure and a professional, skillful division, nested in a financially healthy university that enjoys robust demand. At the same time, the SVP will face predictable challenges, such as a university-wide difficulty recruiting and retaining top talent due to the high cost of



living in the San Luis Obispo area; perpetual CSU systemwide budget uncertainty due to the tendency of the state budget to swing between surplus and deficit in sync with the business cycle; and the likelihood of unanticipated expenses associated with Year-Round Operations, the transition from quarters to semesters, more students living on campus, and more staff working away from it.

### **Qualifications and Characteristics**

A Bachelor's degree in a relevant field is required, Master's degree or higher in a relevant field is preferred. A minimum of 5 years' senior management experience is required. To best serve Cal Poly, the ideal candidate will have many of the following professional qualifications and personal characteristics:

- Understanding of and commitment to the mission and values of Cal Poly;
- Experience/familiarity with the role and function of information technology services in an educational/academic setting;
- Proven ability to lead in a large, complex, high-demand environment, managing multiple priorities simultaneously and accustomed to setting and achieving goals;
- Ability to apply critical, conceptual and strategic thinking to important financial, academic and administrative issues across the university;
- Exceptional communication skills to convey the strategic goals and objectives of finance and administration programs; ability to crystallize complex financial information in lay terms and to effectively articulate the university's financial vision, strengths, goals, and requirements to a wide range of audiences, both internal and external;
- Familiarity with major construction, renovation and maintenance programs; understanding of facilities management, capital construction, real estate development, campus master planning, and business operations;
- Expertise in budget development and implementation; familiarity with a wide variety of financing techniques, financial and ratio analysis, debt management and bond issuance; as well as familiarity with business and finance operations;
- Record of significant leadership and accomplishment in planning, managing and implementing major business and financial systems, human resources, and knowledge of trends in enterprise resource planning and management;
- Ability to lead effectively across divisions using collaboration and persuasion to guide decision-making and influence critical operations; the SVP will be a proven team-player, with the ability both to advocate and partner with others;
- Skill as a negotiator and experience reviewing and realigning systems, policies and personnel; ability to lead in a unionized environment;
- Understanding of the political, social, and economic factors shaping the future of public higher education, and the political skill to develop strong partnerships with CSU, other universities and affiliated entities, and experience dealing with local, state, and federal legislative and regulatory agencies in ways that build trust and promote mutual benefit;

- Demonstrated commitment to embracing and enhancing diversity, affirmative action, and equal opportunity;
- A consummate professional, who will embrace positive change and work well in a highly consultative environment within a culture of transparency and fiscal responsibility;
- A confident, experienced leader, and innovative but disciplined thinker, able to focus on both broad possibilities and opportunities as well as tangible, realistic results;
- Understand and respect shared governance, and be an advocate for an environment that encourages teamwork, student success, inclusive decision-making and a sense of community across the university;
- A record of progressively greater management responsibility in a large, complex organization, preferably in higher education;
- Familiarity with current risk management best practices in higher education;
- Experience with integrating current technology into administrative systems, such as administrative and business services, human resources, and/or facilities management processes;
- Ability to initiate, establish and foster communication and teamwork by maintaining a positive, cooperative, and productive work atmosphere in and outside the university, with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds;
- Ability to establish good working relations with faculty, staff, students, alumni, business partners and other institutional constituencies;
- Ability to effectively address public safety issues within the university and surrounding residential areas;
- Above all else, the highest standards for personal and professional excellence and unquestionable integrity.

Preferred qualifications include:

- Public/private partnership development experience;
- Experience in a collective bargaining environment;
- Experience in an academic setting.

### **Compensation and Location**

The anticipated salary range for this position is \$300,000-\$360,000 annually. Note that the offer is calculated based on the background and relevant years of experience of the individual selected. Cal Poly offers a best-in-class benefits program, including health, dental and vision insurance, retirement participation in the Public Employees' Retirement System, and educational benefits for eligible employees. All rights associated with the appointment are governed by the [Management Personnel Plan](#) adopted by the [CSU Board of Trustees](#).

Cal Poly is located in San Luis Obispo, California (SLO), a coastal city halfway between Los Angeles and San Francisco, is nestled between rolling hills and the coast. Sitting just a few miles from the Pacific Ocean, this city is sheltered by volcanic peaks and is surrounded by protected open spaces, vineyards, agriculture and ranch land. SLO has a population of approximately 44,000, and an economy based largely on agriculture and tourism. The region has a temperate climate many describe as “Mediterranean-like,” which residents enjoy year-round. The city has numerous attractions, such as a weekly Thursday night Farmer’s Market, close proximity to many excellent vineyards, many hotels and bed and breakfasts, restaurants, and opportunities to enjoy local produce and goods. The San Luis Obispo Regional Airport offers commercial air service provided by Alaska, American Airlines and United, connecting to hundreds of destinations, as well as Amtrak rail service to various California locations.

### **Applications, Inquiries, and Nominations**

Screening of complete applications will begin immediately and continue until the completion of the search process. Applications must be submitted through the Cal Poly portal for the search at <https://jobs.calpoly.edu/en-us/job/536240/senior-vice-president-for-administration-financechief-financial-officer>. Each applicant must provide as separate attachments to the online application a detailed curriculum vitae or resume, a cover letter, and a statement of contributions to diversity, equity, and inclusion.

Inquiries, nominations, referrals, and copies of applications can also be sent via the Isaacson, Miller website for the search: <https://www.imsearch.com/open-searches/california-polytechnic-state-university-san-luis-obispo/senior-vice-president>.

David Bellshaw, Evan Layne, and Nancy Pan  
Isaacson, Miller  
100 Sansome Street, Suite 300  
San Francisco, CA 94111

*At California Polytechnic State University, San Luis Obispo, we believe that cultivating an environment that embraces and promotes diversity is fundamental to the success of our students, our employees and our community. Bringing people together from different backgrounds, experiences and value systems fosters the innovative and creative thinking that exemplifies Cal Poly’s values of free inquiry, cultural and intellectual diversity, mutual respect, civic engagement, and social and environmental responsibility.*

*Cal Poly’s commitment to diversity informs our efforts in recruitment, hiring and retention. California Polytechnic State University is an affirmative action/equal opportunity employer.*

## **Appendix I – About the California State University System**

The California State University (CSU) system spans the state of California and has an annual budget of more than \$7 billion. It is not only the largest four-year university system in the nation, but also one of the most diverse and most affordable. The mission of the CSU is to provide high-quality, affordable education to meet the ever-changing needs of the people of California. The CSU is committed to excellence, diversity and innovation. With 23 campuses, more than 350,000 students, and 53,000 faculty and staff, CSU is a leader in high-quality, accessible, student-focused higher education. A student success initiative in the CSU system, the Graduation Initiative 2025 (GI 2025), is the CSU's ambitious effort to increase graduation rates for all CSU students while eliminating opportunity and achievement gaps.

Appendix II – Administration and Finance Organizational Chart

