



Position Profile



Senior Vice President of Business and Finance | April 2022

Executive Summary

The University of Texas at Arlington (UT Arlington or UTA) seeks nominations and applications for the role of Senior Vice President for Business and Finance (SVP) to oversee all areas of finance and key administrative areas for this comprehensive university. The SVP will also serve as the Chief Financial Officer for the University. This leader reports directly to the President as part of the executive leadership team. The SVP succeeds Kelly Davis, who retired in January 2022 after 25 years of distinguished service to UTA.

The SVP is accountable for the administration of all financial operations of the University, including the development of a financial and operational strategy with supporting metrics, and for the ongoing development and monitoring of control systems designed to preserve University assets, report accurate financial results, monitor adherence to the budget, and develop long-term financial and operational strategies.

In addition to accountability for the Business Affairs and Resource Planning organization, the SVP's portfolio includes responsibility for Information Technology, University Analytics, and Information Security. The SVP's management portfolio may evolve to include other areas of responsibility as the new President determines the organizational structure that best serves the goals of the University. The SVP will serve as a key strategic adviser to the President.

UT Arlington seeks a collaborative leader with a record of professional accomplishment in finance, with ideal experience and fluency in other key administrative areas like information technology. Successful applicants will have outstanding administrative leadership capacity, excellent communication skills, and demonstrated commitment to a diverse and inclusive university. Applicants should have experience as a senior financial officer in a higher education setting or in an organization of relevant size and complexity.

Applicants must be familiar with a wide variety of financing techniques and have a record of significant leadership and accomplishments in budget planning and oversight and in major business and financial systems. Knowledge of trends in enterprise resource management systems is valuable, as is experience in dealing with local, state, and federal legislative and regulatory issues as they affect public universities. Finally, an appreciation for the role and funding of research will be helpful.

UTA's new SVP will join one of the nation's largest universities at a moment when new leadership and new strategic directions combine to provide the opportunity for significant continued forward progress for the institution.

Information regarding the process for nominations and applications for this opportunity may be found near the end of this document in the section titled "Procedure for Candidacy".



About the University

Located on a 420-acre campus in the heart of the thriving Dallas-Fort Worth-Arlington Metro Area (population 7.6 million), [The University of Texas at Arlington](#) is a comprehensive teaching, research, and public service institution dedicated to the advancement of knowledge through scholarship and creative work.

As one of the largest and most diverse universities in Texas, UT Arlington is committed to providing access and ensuring student success, and to a culture of innovation, entrepreneurship, and commercialization of discoveries by our community of scholars. The University promotes lifelong learning through its academic, continuing education, and experiential learning programs. The faculty, staff, and student community share diverse cultural values that foster inclusivity and cultivate mutual respect.

Founded in 1895 as a private liberal arts institution, UT Arlington enrolls over 48,000 students and employs nearly 5,000 faculty and staff. The University has the third-most ethnically diverse undergraduate population in the United States (*U.S. News & World Report*, 2022) and is a Hispanic-Serving Institution and an Asian American, Native American, and Pacific Islander-Serving Institution (U.S. Department of Education). UTA graduates more African American students at the undergraduate and master's degree levels than any other Texas university (*Diverse: Issues in Higher Education*, 2021).

In addition to nurturing student success, UTA is focused on making an impact through innovative research. Anchored by its five strategic pillars— health and the human condition, sustainable communities, global environmental impact, data-driven discovery, and culture and societal transformations—the University's research portfolio saw significant growth over the past decade, with expenditures reaching \$125 million in 2021. Faculty work in state-of-the-art facilities, where they make important breakthroughs in areas such as sustainable infrastructure, healthy aging, high-energy physics, cardiovascular disease, machine-learning systems, and more.

In 2021, the combination of outstanding academics and innovative research contributed to the University once again receiving Carnegie R1 "Very High Research Activity" designation and becoming just the fourth university in the state to achieve Texas Tier One status, a milestone of excellence that brings with it access to the state's National Research University Fund. By providing exceptional educational opportunities and addressing important societal challenges, UT Arlington enhances the quality of life in Texas and beyond.

The government of the University is vested in a nine-member Board of Regents of the UT System, nominated by the governor, and approved by the Texas Senate. In addition to its main campus in Arlington, UTA has two facilities in neighboring Fort Worth: a downtown campus called UTA Fort Worth that is tailored for working professionals and a research institute on the banks of the Trinity River that is focused on bridging the gap between academic research and product development.

Notables

- UTA has 16 graduate programs ranked as “Best Graduate Schools” by *U.S. News & World Report* (USNWR, 2023).
- UTA is ranked No. 3 nationally on the *U.S. News & World Report*’s undergraduate diversity index and is ranked No. 26 as a “Top Performer on Social Mobility” (USNWR, 2022).
- UTA is ranked No. 1 for veterans and their families among four-year institutions (*Military Times*, 2020 and 2021).
- UTA alumni occupy leadership positions at many of the 22 Fortune 500 companies headquartered in North Texas.
- UTA’s College of Nursing and Health Innovation is the No. 1 producer of baccalaureate-degreed nurses in Texas.
- UTA and its alumni contribute \$22.2 billion and 216,544 jobs annually to Texas.
- UTA was one of 150 colleges and universities recognized on the Phi Theta Kappa 2021 Transfer Honor Roll.
UTA baccalaureate graduates working in Texas earn the highest first-year median wage of all UT System non-medical institutions (UT System *Smartbook*, 2021).

Mission

The University of Texas at Arlington is a comprehensive teaching, research, and public service institution dedicated to the advancement of knowledge through scholarship and creative work. The University is committed to providing access and ensuring student success, and to a culture of innovation, entrepreneurship, and commercialization of discoveries by our community of scholars.

The University promotes lifelong learning through its academic, continuing education, and experiential learning programs. The faculty, staff, and student community share diverse cultural values that foster inclusivity and cultivate mutual respect.

Vision and Values

The University of Texas at Arlington is a pre-eminent urban public research university that inspires bold solutions with global impact through creative scholarship, transformative access, and collaborative learning.

Institutional values are Access and Success, Opportunity and Excellence, Inclusiveness and Diversity, Mavericks and Innovators, and Collegiality and Collaboration.

Academics

UT Arlington offers more than 180 baccalaureate, master's, and doctoral degree programs across nine schools and colleges, including the largest nursing college at a public university in the country. Students hail from coast to coast and over 100 countries worldwide, with around 10,000 living on or near campus. Each year, approximately 14,000 graduates join the ranks of UTA alumni, now numbering more than 250,000.

Academic Colleges

- [College of Architecture, Planning, and Public Affairs](#)
- [College of Business](#)
- [College of Education](#)
- [College of Engineering](#)
- [Honors College](#)
- [College of Liberal Arts](#)
- [College of Nursing and Health Innovation](#)
- [College of Science](#)
- [School of Social Work](#)

Accreditation

The University of Texas at Arlington is accredited by the [Southern Association of Colleges and Schools Commission on Colleges](#) to award baccalaureate, master's, and doctoral degrees. In addition, many of UTA's academic departments and schools have received national accreditation from specific agencies.

These accreditations are detailed under the individual listings for departments and schools in the [University Catalog](#).



Leadership: President-Designate Jennifer Cowley

The University of Texas at Arlington is thrilled to welcome Jennifer Cowley, Ph.D. Set to begin her role on April 28, 2022, Dr. Cowley is the first female president in the University's history. Most recently, she served as provost at the University of North Texas (UNT), where she enhanced research, fostered student success, and advanced diversity, equity, and inclusion.

Before joining UNT in 2017, Cowley was a member of the faculty at Ohio State University, serving as vice provost for capital planning and regional campuses, associate dean for academic affairs and administration in the College of Engineering, and department chair and professor in city and regional planning.



Cowley grew up in Arlington and is looking forward to returning home to advance UTA as one of the nation's leading research universities.

Arlington

Arlington, Texas, is one of the fastest-growing communities in the nation. Located between Dallas and Fort Worth in North Texas, the city is home to more than 380,000 residents, making it the seventh largest in the state. It is also the hometown of three professional sports teams: the Texas Rangers, the Dallas Cowboys, and the Dallas Wings, the latter of whom plays its home games at UTA's College Park Center. Residents, athletes, and visitors alike enjoy hot summers and mild winters and fill their days with good food, good company, and good entertainment.

The University of Texas at Arlington is in Tarrant County (population 2.1 million). Arlington is easily accessible, located 30 minutes from the two major airports in the Metroplex—DFW International Airport, Dallas Love Field Airport, and Alliance Airport. Less than two miles from AT&T Stadium and Globe Life Field, where the Dallas Cowboys and Texas Rangers, respectively, play, and less than three miles from Six Flags Over Texas, UTA is just a stone's throw away from the excitement the city of Arlington has to offer.

Role of the Senior Vice President

The SVP is accountable for the stewardship, administration, tracking and reporting of all of UT Arlington's financial resources as well as other key enablers of the University's mission, such as human resources and information technology. The incumbent will provide strategic and tactical leadership for the institution; advise the President, the UT System, and the executive leadership team on financial strategies and business initiatives; and ensure that the University's financial resources support institutional priorities.

This individual will be responsible for the short- and long-term financial health of the University, leading institution-wide initiatives to develop multi-year, multi-fund financial plans and forecasts, annual budgets, and appropriate financial reporting. The SVP will oversee the financial planning and accounting operations, business process improvements, and financial analysis.

The SVP is accountable for financial policy development and policy decisions, general programmatic direction for all the reporting units, and the establishment of effective working relationships with all the academic and administrative financial officers across the University.

The SVP works closely with UTA's President, Provost, and the other Vice Presidents to ensure the financial and business infrastructure of the institution is appropriate to support its goals for the 21st century and to provide clear communication that will enable the entire leadership team to function more effectively. The SVP will ensure the financial systems of the institution are transparent, with a comprehensive reporting environment that can provide necessary data for effective decision-making and ensure effective use and understanding of this data throughout the institution.

The SVP will develop and implement a financial plan for the University congruent with UTA's strategic plans. Other responsibilities include:

- Lead—and be accountable for—assessment of institutional risk and establishment of internal controls.
- The direction of the Business Affairs, Budget, Planning and Analysis, Academic Resource Planning, Information Technology, Information Security, and University Analytics organizations
- Preparation of the institutional annual budget.
- Serve as a key member of the executive leadership team and offer ongoing advice and counsel.
- Preparation of the annual financial report in accordance with GAAP.
- Establishment of recommended tuition and fees.
- Formulate and recommend business and fiscal policies and procedures.
- Internal and external reporting.
- Ensure cash flow is appropriate and investments are maximized.
- Responsible for business process improvement, continuous quality improvement, and benchmarking and change leadership within the division.
- Ensure legal and regulatory compliance.
- Drive a culture of diversity, equity, and inclusion.
- Ensure employee satisfaction and team ethos within the division.
- Develop and administer University policies related to business and finance.

UT Arlington operates on a \$760 million budget. The revenue sources are tuition and fees (45%), state (19%), grants and contracts (22%), auxiliary services (6%), sales and services (3%), and gifts, interest, and other (5%). As of January 2022, the UTA endowment was \$211 million.



Opportunities and Expectations for Leadership

The new SVP will be asked to address priority leadership issues, including but not limited to:

Evaluate and optimize the business and finance organizational structure

The scope of this role encompasses a vast portfolio of financial and administrative/operations areas. On the finance side, these include Business Affairs/Controller, Academic Resources Planning, and Budget Planning and Analysis. On the business side, the direct reporting organizations have historically included Human Resources, Information Technology, University Analytics, and Information Security. It is expected that the new SVP will take a keen and thoughtful look at this organization and make appropriate adjustments to optimize its structure.

Also, the SVP will advise the new President on the ideal alignment of functional responsibilities under this role. In early 2022, the areas of Human Resources, Information Technology, University Analytics, and Information Security were reassigned to report directly to UTA's then-interim President. Given the new President's vast span of control, there will be consideration to repositioning roles and responsibilities. The SVP will offer learned counsel to the President in this area.

Serve as the University's "Champion" for the implementation of a new budget model

UT Arlington is in the early stages of implementing a new budget model that follows the principles of Responsibility Center Management (RCM). UTA's historic budget model was incremental in nature. In its simplest form, it rolled units' prior-year operating budgets forward and either added or subtracted some amount of funding to those figures. Beginning with FY23, the RCM model will utilize a data-driven approach to resource allocation that ensures revenue-generating units are accountable for managing their own revenues and expenditures. The goals of this initiative are to:

- Increase transparency and expand communications across all units
- Increase strategic opportunities in the colleges and schools
- Create resources for strategic initiatives and funding to support operations
- Set clear and realistic expectations for all units

The SVP will be proactive in building awareness, collaboration, and support for this initiative, ensuring successful University implementation. Also, the SVP will serve as Chair of the Budget Advisory Committee, which will institutionalize a process for sharing and understanding budget information.

Assess business and finance policies and practices to ensure the highest levels of professionalism, compliance, effectiveness, and efficiency.

The new SVP should apply "fresh eyes" to the current administrative and operational infrastructure, with the goal of ensuring that best practices are in place in all areas. This includes the application of proper controls in budget/expense oversight and the evaluation of financial systems and technologies to ensure they are performing at expected levels. To ensure the highest levels of service quality and efficiency, the SVP will be expected to foster an organizational culture and infrastructure that supports the goal of making UTA a well-managed university that supports its academic mission.

Identify new revenue sources to fund current programs and seek out efficiencies in UTA's cost structure

UT Arlington has grown dramatically over the past decade, adding exciting new programs and facilities. While this has boosted the University's reputation and standing, there is opportunity to ensure that growth is adequately funded so programs are of the quality and impact desired. In partnership with the President, a financial strategy will be developed to identify the revenue impacts of new programs, tuition discounting, and auxiliary enterprises. The SVP should be adept at creatively solving revenue problems and overlay discipline in areas that impact revenues, such as tuition discounting.

On the expense side, while UTA has managed effectively through the COVID-19 pandemic, the financial implications of this will require ongoing efforts to mitigate costs and seek efficiencies. It will be critical that the SVP be an active advocate for UTA's effective and efficient use of its resources.

Provide strategic financial counsel and reporting to the University's leadership

The President, Provost, Vice Presidents, and other senior leaders welcome a strong and collaborative partner and adviser to guide the institution's finances and business affairs. The next SVP will be an individual who is energized by the future possibilities at UTA and who thrives in a dynamic organizational environment characterized by efficiency and effectiveness. The SVP will be a highly valued University leader and an active participant in cabinet-level strategy discussions, decision-making, and direction-setting, and will have significant experience managing and presenting to the senior leadership team on organizational finance and business affairs activities.

Work closely with University of Texas System leaders

With understanding of—and appreciation for—the dynamics of a university system environment, the SVP will work closely with UT System administrators to ensure that UTA initiatives and expectations are aligned with system expectations.

With certain University functions in Human Resources and Finance being housed at the system level, it is critical that there are open lines of communication between UTA and its UT System counterparts. The SVP will also serve as a forceful advocate for UTA's interests at UT System.

Qualifications and Qualities

The SVP will be highly mission-oriented, have a strong sense of service, and convey a passion for the impact of higher education on students, faculty and staff, and the community.

This leader will be both financially savvy and politically astute. The SVP will possess a robust and progressive record of successful leadership within a complex organization and will need to see financial resources at an institution as the enabler for important institutional priorities, such as enhancing student access and success.

The ideal candidate will have an open, accessible, and transparent approach to management, along with significant experience in the building of teams, new organizations, and the capacities of the members of those teams. The successful candidate will have built and managed organizations with a strong service orientation and will have built collaborative partnerships with leaders of the academic enterprise. Previous experience as a financial/administrative leader in a complex higher education institution is preferred, but the University will be open to considering candidates with comparable experience in organizations of a similar scale and complexity.

The SVP will possess strong interpersonal and relationship-building skills, both to work effectively within the various reporting organizations and to build trust and confidence with other members of the leadership team, across the institution, and with the UT System. The incumbent will understand the academic endeavor, approach their work with a “people” orientation, and possess exceptional communications and leadership skills.

The ideal candidate will have a deep appreciation of budget models and have led significant change processes in a complex institutional environment. With a vision for systems change and a strong understanding of the technology tools available to facilitate institutional effectiveness, they will have the energy and enthusiasm to create culture change while ensuring a stable financial framework for future planning.

In addition to a substantial record of strategic financial leadership within a large, complex environment, the strongest candidates will demonstrate many of the following:

Qualifications

- A bachelor's degree from an accredited college or university in a relevant field of study, with a preference for an advanced degree in a relevant field of study and/or a CPA Certificate;
- Demonstrated expertise in strategic financial planning, financial reporting and real estate investment management, cash flow management, and other financial functions;
- Experience in debt financing and investment strategies is highly desirable;
- A history of strong analytic capabilities, with a clear record of using data to make informed decisions;
- An ability to communicate complex financial information to a wide range of internal and external stakeholders, making it digestible for those who may not have as much experience with financial matters;
- Strong analytical and problem-solving skills, an entrepreneurial spirit, and a propensity for finding creative solutions to complex challenges;
- A record of successfully developing, managing, and mentoring staff, and proven skills in building relationships with faculty, professional staff, students, and external partners;
- The ability to operate effectively within a complex, decentralized campus and system environment;
- A strong understanding of research and scholarship activity, with an ability to support the advancement of an evolving research agenda and technology transfer initiatives;
- An appreciation for the financial implications of a large intercollegiate athletics program;
- Experience in leading administrative functions;
- Experience in supporting governing boards, and in staffing committees or subgroups on matters of a financial, capital investment, or administrative nature;
- The ability to lead information technology initiatives in finance and business; and
- Proven ability to oversee the preparation and monitoring of budgets and financial projections.

Qualities

- The ability to affect cultural change and drive innovation of systems, practices, and procedures;
- A record of innovative leadership and an ability to think outside the box;
- Appreciation for the principals and practices of shared governance, and a propensity for acting quickly within the context of a highly collaborative environment;
- Politically savvy with the ability to navigate effectively at the university, system, and statewide levels;
- Ability to serve as a teacher and educator in building awareness of UTA's financial trends, challenges, and opportunities; and
- The highest level of integrity, a sense of humility and humor, and an even-keeled temperament.

The SVP should convey a commitment (in both word and deed) to diversity, inclusion, equity, and the ability to articulate a strong rationale for their importance to UT Arlington. Within the organization, the SVP should foster a culture of diversity in team members and thought.

Finally, candidates should present unquestionable integrity, high energy, an entrepreneurial and innovative spirit, and a commitment to the mission and values of the UT Arlington.

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 UT Arlington in this search. For fullest consideration, candidate materials should be received by May 20, 2022. Application materials should be submitted using WittKieffer's [candidate portal](#). Applications, nominations, and expressions of interest will be treated in full confidence. References will not be contacted without prior knowledge and approval of candidates.

Nominations and inquiries can be directed to:

John K. Thornburgh and Jane Courson UTArlingtonSVP@wittkieffer.com

The University of Texas at Arlington (UTA) is committed to providing equal employment and educational opportunities for all qualified persons without regard to race, color, national origin, religion, age, sex, sexual orientation, disabilities, pregnancy, genetic information, and/or veteran status. Retaliation against persons who oppose a discriminatory practice, file a charge of discrimination, or testify for, assist in, or participate in an investigative proceeding relating to discrimination is prohibited. See the [University of Texas at Arlington's Notice of Non-Discrimination here which includes contact information](#).

The material presented in this leadership profile should be relied on for informational purposes only. This material has been copied, compiled, or quoted in part from UT Arlington documents and personal interviews and is believed to be reliable. While every effort has been made to ensure the accuracy of this information, the original source documents and factual situations govern.



Office of Human Resources

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