













EXECUTIVE SUMMARY

The University of the South, familiarly known as "Sewanee," seeks a seasoned financial executive and leader to serve as its Chief Financial Officer (CFO) and Vice President of Administration.

R eporting directly to the Vice-Chancellor and President, the CFO/VPA is a vital member of the University's executive leadership team and cabinet. This individual will play a critical role in guiding Sewanee's financial strategy, operational oversight, and long-term sustainability, particularly in an evolving higher education landscape. The CFO will oversee key administrative functions, including Finance, Purchasing, Human Resources, Dining Services, and Facilities Management, ensuring operational efficiency and financial strength.

Aligned with Sewanee's strategic and operational goals, the CFO will lead financial planning, budgeting, and endowment management while maintaining transparency and accountability with governing boards, faculty, and other stakeholders. This role demands a forward-thinking leader who embraces collaboration, innovation, and data-informed decision-making to support the University's academic mission and institutional growth.

Ideal candidates will bring extensive leadership experience in financial and administrative management, ideally in higher education. Strong financial acumen, strategic vision, and exceptional communication skills are essential to effectively engage with internal and external partners. This is a unique opportunity to shape the financial future of a leading institution of higher learning, ensuring its continued success and impact.

For information regarding how to apply, submit nominations, or inquire about the role, please see the section "Procedure for Candidacy" at the end of this document.



OPPORTUNITIES AND EXPECTATIONS FOR LEADERSHIP

Today's higher education landscape is rapidly evolving, and the Chief Financial Officer will serve as a strategic leader who ensures that Sewanee not only remains sustainable but continues to thrive. This visionary leader will oversee financial planning, budget management, and resource allocation, ensuring that financial decisions align with the University's mission and long-term goals. Beyond financial stewardship, the CFO will play a pivotal role in identifying opportunities for innovation, strategic investments, and long-term growth.

The CFO must be a collaborative and forward-thinking leader, capable of leveraging data-driven insights to inform decision-making, enhance operational efficiency, and position the University as a leader in higher education. With a focus on sustainability and impact, the CFO will help shape a bold and thriving future for Sewanee.

Essential Functions

- Lead all financial operations, including budgeting, accounting, strategic financial planning, and forecasting.
- Drive future and strategic financial planning and facilitate discussion on the impact of long-term financial matters.
- Oversee long-term capital planning, including campus facilities management and infrastructure investment.
- Serve as a key member of the Vice-Chancellor's senior leadership team, coordinating the overall financial management of the University.
- Serve as a strategic partner to the Vice-Chancellor and Board.
- Provide strategic leadership in campus planning and management.
- Supervise and provide leadership for administrative functions including Finance, Purchasing, Human Resources, Dining Services, and Facilities Management.
- Lead the annual budgeting processes, monitor actual-to-budget reports, and implement budget-related initiatives
- Ensure operational efficiency and cost-effectiveness in all administrative functions.

- Provide regular, transparent, and highly visible reporting to stakeholders, including governing boards, faculty, University affiliates, and donors.
- Maintain as a priority compliance with laws, regulations, and standards applicable to divisional activities.
- Advise the Vice-Chancellor, cabinet, and board members on issues relating to administration and finance by
 presenting reports and recommendations during board
 meetings and preparing reports, recommendations,
 findings, and other correspondence as needed.
- Serve as the administrative liaison to the Board of Regents' Operations Committee and the Investment Management Committee, the latter of which requires working with the University's outsourced investment partner (OCIO) to coordinate endowment investments and management.
- Manage and mentor staff within the finance and administration division.
- Promote professional development and foster a culture of collaboration and continuous improvement.
- Build and maintain effective working relationships with faculty, staff, students, and external stakeholders and serve as a point person for outside audit partners.

Professional Experience

- Master's degree in finance, business administration, or a related field (MBA/CPA preferred).
- Extensive experience (IO years) in finance and administration leadership roles.
- Proven leadership experience with the ability to manage complex financial and operational systems.
- Strong knowledge of accounting principles, budgetary processes, and financial reporting.
- Familiarity with higher education funding models, including grants, tuition revenue, and endowments, with a particular understanding of private liberal arts education.
- Exceptional communication, organizational, and problem-solving skills and a proven record of collaboration and teamwork.



OPPORTUNITIES AND EXPECTATIONS FOR LEADERSHIP

Core Competencies

Financial Acumen: In-depth understanding of financial operations, accounting standards, budget management, and financial reporting.

Strategic Thinking: Demonstrates the ability to anticipate and plan for the long-term financial success of the University by aligning fiscal strategies with institutional goals.

Analytical Skills: Proficiency in analyzing complex financial data, developing budgets, and generating insightful financial reports.

Problem-Solving skills: Strong critical thinking and problem-solving skills geared toward identifying risks and creating solutions with the ability to balance operational management and long-term planning.

Leadership: Proven ability to lead and inspire a team, fostering collaboration and continuous development.

Communication: Exceptional communication skills, with the ability to clearly present financial information to both financial and non-financial audiences.

Collaboration: Strong interpersonal skills to connect with individuals from various backgrounds, understanding their unique experiences and perspectives, and effectively addressing any issues or concerns.



ABOUT SEWANEE

At a Glance

University Enrollment

- College of Arts & Sciences: 1,658 undergraduate students from 42 states and the District of Columbia, with 56 international students from 23 countries.
- The School of Theology: 145 graduate students in yearround and summer programs.
- The School of Letters: Offering an MFA in creative writing, the School of Letters is a summer-focused degree program that brings more than 50 graduate students to campus each year to study with an acclaimed faculty.

Undergraduate Academics & Outcomes

- Sewanee offers 38 majors, 43 minors, and 13 special programs, along with pre-professional programs in business, health/medicine, education, engineering, and law.
- Student-faculty ratio is about IO:I | Average class size is about I6.
- Sewanee has produced 27 Rhodes Scholars, 53 Watson Fellows, 35 NCAA Postgraduate Scholars, and dozens of Fulbright Scholars.
- Our graduate school acceptance rates are: business 90-95%; law 90-95%; medicine 80-85% (national average is 42%).

Highlights from the first-year class that entered in the fall of 2024:

- Total applications: 5,204
- · Admitted: 52%
- Total first-year enrollment for Class of 2028: 482
- · Yield: 18%
- Average GPA (4.0 scale): 3.84
- ACT Composite (mid 50%): 28-32
- SAT Combined (mid 50%): 1270-1390
- Students of color: 18.3%
- · International students: 5 percent

Faculty and Staff

- Sewanee's faculty consists of about 184 full-time and 31 part-time professors. 92% of full-time faculty and 86% of all faculty hold a doctoral/highest terminal degree in their field.
- Sewanee employs about 630 full- and part-time staff members in support of the university's mission.

Position Statement

Located on a 13,000-acre Domain on the Cumberland Plateau in Tennessee, the University of the South is a premier liberal arts college and seminary of the Episcopal Church that cultivates academic excellence, community values, and environmental stewardship and produces informed, self-aware, and participatory citizens for our democracy and servant-leaders for the world.

Statements of Purpose

The University of the South is an institution of the Episcopal Church dedicated to the pursuit of knowledge, understanding, and wisdom in close community and in full freedom of inquiry, and enlightened by Christian faith in the Anglican tradition, welcoming individuals from all backgrounds, to the end that students be prepared to search for truth, seek justice, preserve liberty under law, and serve God and humanity.

The College of Arts and Sciences is committed to the development of the whole person through a liberal arts education of the highest quality. Outstanding students work closely with distinguished and diverse faculty in a demanding course of humane and scientific study that prepares them for lives of achievement and service. Providing rich opportunities for leadership and intellectual and spiritual growth, while grounding its community on a pledge of honor, Sewanee enables students to live with grace, integrity, and a reverent concern for the world.





ABOUT SEWANEE

The School of Theology educates students to serve the broad whole of the Episcopal Church in ordained and lay vocations. The School develops leaders who are learned, skilled, informed by the Word of God, and committed to the mission of Christ's church, in the Anglican tradition of forming disciples through a common life of prayer, learning, and service. Sewanee's seminary education and worldwide programs equip people for ministry through the gift of theological reflection in community.

Traditions and Ethos

Sewanee remains purposefully small and dedicated to academic excellence in an intimate residential college setting where 99% of our students live on campus. We are known for close student-faculty relationships, supported by a IO:I student:professor ratio. It also is a place that gathers strength from its traditions, from the wearing of the academic gown and "tapping the roof" to the quintessential small-town Fourth of July celebration. These customs, which enrich the experience at Sewanee, emerge from its past and, from time to time, through student and faculty ingenuity in updating current customs and establishing new ones.

The Honor Code, in existence informally since the 1870s and formally since 1913, defines Sewanee's community of respect, trust, and tolerance, which brings security and freedom to campus. Students commit to these ideals by signing the University's Honor Code at matriculation. The Honor Code is a tradition that is maintained by an Honor Council elected from the student body in collaboration with the faculty and the Dean of the College's Office.

The wearing of academic gowns by faculty, and by College and School of Theology students who have attained membership in the Order of the Gown based on their academic standing, is uniquely Sewanee, a nod to the Oxbridge tradition that symbolizes the institution's respect for academic endeavor and leadership. The wearing of gowns is optional, and students and faculty readily shed them to pursue environmental field studies on the Domain, collaborative research in laboratories, and study abroad.

Comprehensive examinations taken in the senior year of undergraduate study conclude the academic experience at Sewanee, and prompt students to say, "I'm comped," after completing rigorous oral or written exams in their major.

The University Domain

The University of the South campus comprises 13,000 acres known as the Domain. Largely undeveloped and rich in biodiversity, the land is intrinsic to the identity and purpose of the University, a distinctive asset offering an unparalleled outdoor laboratory and boundless recreational opportunities. Today, the University's landholdings are the second largest among private institutions of higher education in the United States. Of the University's 13,000 acres, approximately one-third is composed of the campus, businesses, residential areas, and student housing. The remaining two-thirds is managed for research, teaching, recreation, and ecosystem services by the Office of Environmental Stewardship and Sustainability (OESS) for use by all parties within the University community and outside.

OESS maintains an outdoor recreational system that is unparalleled among U.S. campuses. The Perimeter Trail is the signature trail of the Domain, a 20-mile loop that circles much of the campus. Sixteen lakes and IO developed camping areas give students ample opportunities to explore the furthest reaches of the property, and rock climbing and bouldering opportunities abound for students and employees alike. The trail networks pass through both protected old-growth remnant forest as well as the Sewanee Demonstration Forest, an actively managed area where innovative forest management and prescribed fire programs create and enhance wildlife and plant communities.

The village of Sewanee is on the Domain and is home to approximately 2,500 people; it is not incorporated but is managed by the University, which provides police and fire protection, and emergency medical services. Unique among other universities, the Vice-Chancellor also acts as the de facto mayor of Sewanee.

The Sewanee Village: Sewanee Village Ventures

A thriving Sewanee Village is a critical component of the University's ability to attract and retain students, faculty, and staff. A vibrant village will allow the University to provide a charming, rural town experience for those choosing to call the Domain home. Just as important, it will generate important tourism and support a healthy local economy poised to grow within a very desirable geographic area. In 2022, the University created Sewanee Village Ventures (SVV), a for-profit entity, as an investment vehicle for new commercial and residential initiatives to support these goals. SVV is managed out of the Office of Economic Development.

FINANCES

The continued value of a Sewanee education is a direct result of the University's ability to finance faculty and educational resources through an endowment that supplements tuition and fees in support of continued academic excellence.

In the most recently audited financial year (ending June 30, 2024), the University had total operating revenue of \$128.9 million: \$63.2 million of tuition and tuition-related revenue, endowment spending and other investment income of \$32.4 million, contributions (gifts) of \$12.3 million, revenue from auxiliary activities of \$15 million, and the balance (\$6 million) from other sources.

Total operating expenses for the financial year ending June 30, 2024, were \$129.7 million.

For the financial year ending June 30, 2025, the University had total assets of \$851.1 million, including investments and liquid assets valued at \$554.8 million, and property, plant, and equipment valued at \$226.1 million. Liabilities for the same financial year were \$104.3 million, including \$79.6 million outstanding in public bond issues.











Elevating Mind, Heart, and Place: The Strategic Plan for the University of the South 2024–2030



In August 2024, the University of the South announced the adoption of its first strategic plan in 12 years—Elevating Mind, Heart, and Place: the Strategic Plan for the University of the South 2024–2030.

The strategic plan builds upon a rich liberal arts and theological education tradition that explores enduring questions of humanity infused with practical engagement that prepares our graduates for lives of integrity, service, and leadership. At the University of the South, education has never been just about the pursuit of abstract knowledge; it has long sought to prepare students to be engaged citizens who meet society's needs. Such an educational model requires that students be outfitted with the knowledge, skills, and powers of discernment needed to address the challenges they will face in the world and the moral character to take on such responsibilities.

In keeping with its educational mission and tradition, the University of the South has developed this strategic plan with a clear focus on students. To that end, two underlying objectives animate our strategic plan:

- providing a comprehensive curricular offering that will sustain our attractiveness to a larger number of high-caliber students; and,
- preparing students for lives of service and leadership so
 they will become active citizens contributing to democracy at home and the resolution of challenges around
 the world.

Achieving these twin goals will elevate our standing in the increasingly competitive landscape of higher education. Education takes many forms, but it always occurs in the context of the myriad relationships formed among students and between students and members of the faculty, staff, and community. At the University of the South, all members of the community have the opportunity to contribute to, and bear the responsibility for, students' formation.

Primary Goals

- · Renew and Enhance the Curriculum
- Enhance Student Formation and Leadership Development
- Make the University and Its Domain a Model of Inclusive Community and Environmental Stewardship
- · Enhance University Buildings and Grounds
- Grow the Endowment and Generate New Sources of Revenue



PROCEDURE FOR CANDIDACY

The application deadline for full consideration is Friday, May 30, 2025.

To apply, applicants should include in MS Word or PDF format a letter of interest addressing the themes in this profile, a resume, and three references with email addresses and phone numbers (to be contacted at a later date with the candidate's approval) to

 $\underline{SewaneeCFO@baker consulting groupllc.com}.$

Nominations and confidential inquiries can be directed to Brad Baker, President of Baker Consulting LLC, or Shanthi Row, Principal Consultant, at

SewaneeCFO@bakerconsultinggroupllc.com.

The University of the South is an equal-opportunity educational institution that is committed to creating and maintaining a diverse and inclusive campus environment.









