

OBERLIN

COLLEGE & CONSERVATORY

Director of Budget and Financial Planning



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THE OPPORTUNITY

Oberlin College and Conservatory invites applications from, and nominations of, dynamic and strategic leaders for the position of Director of Budget and Financial Planning. The Director supports the College in informed decision making through robust planning, analysis, and information delivery.

ABOUT OBERLIN

Oberlin College & Conservatory is a four-year, highly selective liberal arts college that combines a top-ranked college of arts and sciences with a world-renowned conservatory of music. Combined, the two divisions enroll approximately 2,900 students. Founded in 1833, Oberlin College & Conservatory was the first college in America to make interracial education and coeducation central to its mission; these traditions live today within a commitment to positive social engagement.

Located 35 miles southwest of Cleveland, Ohio, Oberlin College & Conservatory has earned a reputation of excellence based on the quality of its richly diverse student body, outstanding faculty, excellent facilities, and academic and technological resources.

Oberlin is a place of intense energy and creativity, built on a foundation of academic, artistic, and musical excellence. With a top-ranking [liberal arts college](#), a world-class [conservatory](#),

and a first-rate [art museum](#) all on a single campus, it is the ideal laboratory in which to study and design the world you want. From its founding, Oberlin College has been a school with a mission. Beginning with abolition and coeducation, and most recently addressing the challenges of climate change, Oberlin has always been—to quote historian Geoffrey Blodgett '53—a “peculiar mix of scholarly ambition and stubborn moral idealism.”

Additional [Oberlin History](#).

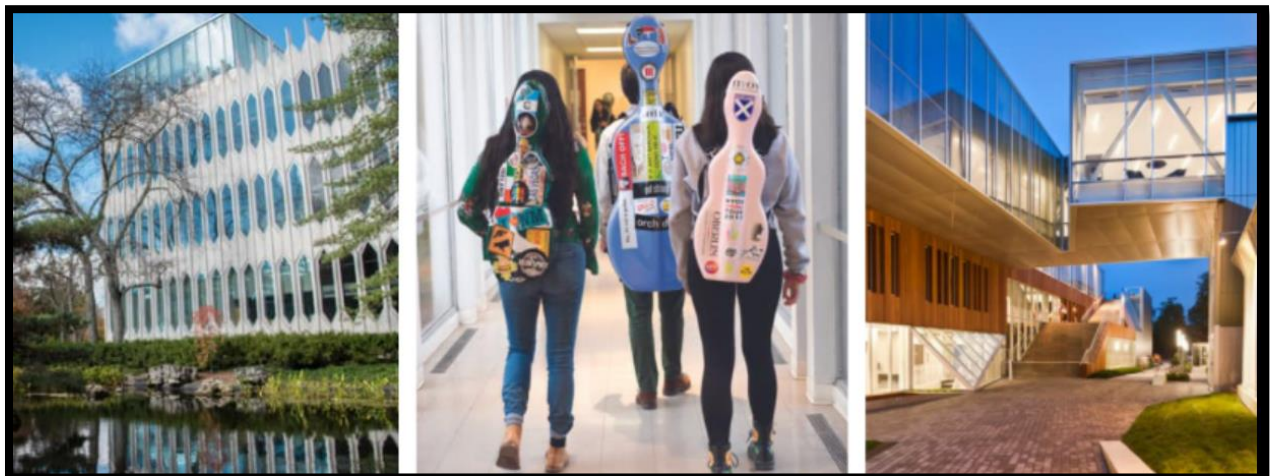
Mission and Values

Oberlin College, an independent coeducational institution, holds a distinguished place among American colleges and universities. Oberlin was the first college to grant undergraduate degrees to women in a coeducational program and, historically, was a leader in the education of African Americans. The Oberlin community is known for its academic and musical excellence and its commitment to social engagement and diversity.

Mission Statement

Oberlin educates students for lives of intellectual, musical, and artistic rigor and breadth; sustained inquiry, creativity and innovation; and leadership. Oberlin aims to prepare graduates with the knowledge, skills, and perspectives essential to confront complex issues and to create change and value in the world.

Oberlin is committed to educational access and opportunity. It seeks to offer a diverse and inclusive residential learning environment encouraging a free and respectful exchange of ideas and shares an enduring commitment to a sustainable and just society. [Strategic Plan](#).



Leadership & Administration

The president is the chief executive officer of the college and is responsible for its effective administration and operation. The president reports to the Board of Trustees and is an ex officio member. In its more than 175-year history, 15 individuals have served as college president.

The President



Carmen Twillie Ambar is the 15th president of [Oberlin College](#) and the first African American leader in the institution's 189-year history. Ambar came to Oberlin in 2017, after serving nine years as president of [Cedar Crest College](#) in Allentown, Pennsylvania.

At Oberlin, President Ambar has successfully implemented a number of transformative initiatives that promote a culture of academic innovation, environmental sustainability, a renewed commitment to social engagement, and fiscal responsibility, all while guiding the campus community safely through the pandemic.

To begin this work, Ambar initiated an [Academic and Administrative Program Review](#) process, a data-driven, top-to-bottom examination of the institution. The process resulted in the adoption of [One Oberlin](#), which established an innovative academic and fiscally disciplined vision that triggered nine new integrated concentrations and six inter-divisional minors. Faculty and administrators also established a new [Center for Engaged Liberal Arts](#) offering a range of student services including study abroad, entrepreneurial thinking, community-based learning and more.

Other innovations include the framing for a [new conservatory curriculum](#), an emphasis on career communities and [Winter Term](#), and long-term strategies for the reallocation of resources and growth for the College of Arts and Sciences and Conservatory of Music.

As part of Oberlin's commitment to fight global warming, Ambar implemented a four-year, more than \$140 million geothermal sustainable infrastructure project that will allow the institution to become one of the first carbon neutral campuses in the nation when the project is completed in 2024.

In August 2020, Ambar announced her [Presidential Initiative on Racial Equity and Diversity](#), a comprehensive, yearlong examination of Oberlin's campus that led to a renewed commitment to diversity, equity, and inclusion and the launch of the Center for Racial Equity, focused on research and the academic experience.

In an effort to bridge the differences that divide us, Ambar strengthened [Sustained Dialogue](#), which teaches students to talk about difficult topics with people with whom they disagree.

Oberlin's new [Internship Plus](#) program guarantees funding for every Oberlin student to pursue an internship or musical appointment during the summer. Similarly, Ambar began a \$10,000 Oberlin Commitment Scholarship for all new students, and a student success coaching program for students who need assistance.

To supplement the college's bonds with its community, Ambar conceived the [Connect Cleveland](#) initiative which sends all first-year students to Cleveland for a day of service and experiential learning, and Community 101, a program prominent at freshman orientation each fall that connects Oberlin's government and business leaders with students.

Prior to her nine years as president of Cedar Crest College, Ambar served as vice president and dean at Douglass College at Rutgers University. Before Rutgers, Ambar served as assistant dean of graduate education at The Princeton School of Public and International Affairs. As an attorney, she worked in the New York City Law Department as an assistant corporation counsel.

Ambar holds a Bachelor of Science degree in Foreign Service from the Edmund A. Walsh School at Georgetown University, a master's degree in Public Affairs from The Princeton School of Public and International Affairs at Princeton University, and a law degree from Columbia School of Law.



The Community

The town of Oberlin, population 7,884, is situated approximately 35 miles southwest of Cleveland, OH. Two Presbyterian ministers, John Shipherd and Philo Stewart founded both the city of Oberlin and Oberlin College and Conservatory in 1833. While searching for a suitable location, the two stopped to rest and pray under an elm tree, which is now part of Tappan Square. Initially proposed as a religious community, Oberlin got its name from Jean-Frederic Oberlin, an Alsatian minister. Over the years, Oberlin developed into a community that focused on the abolitionist movement in the United States. It also became a pivotal city for the Underground Railroad. Today, you will still see several pieces of history painted on the city's walls and see several historical buildings that helped shape its culture and heritage.

- [City of Oberlin, OH](#)
- [15 Best Things to Do in Oberlin, OH](#)
- [Explore Oberlin's Natural and Cultural Attractions](#)
- [Learn about what Cleveland, OH has to offer](#)



The Director of Budget and Financial Planning

Oberlin College & Conservatory's next Director of Budget and Financial Planning is a professional adept at financial analysis, forecasting, and modeling. The successful candidate supports the College in informed decision making through robust planning, analysis, and information delivery. The Director will assist College leadership in implementing appropriate budget and planning strategies that support the College's strategic objectives and initiatives.

Qualifications

- Bachelor's degree in accounting, finance, or other relevant field.
- Five or more years of experience in a leadership role as the principal budgeting and planning administrator for a similarly complex company, institution, college, or university.
- Knowledge and experience in ERP systems with concentration in Finance systems and related processes.
- Knowledge of generally accepted accounting principles and best practice accounting procedures.
- Intermediate or expert level capability with Microsoft Office (Excel, Word, PowerPoint).

Responsibilities

The Director of Budget and Financial Planning will:

- Implement and oversee an efficient and effective annual budget and planning process. Serve as liaison between the Finance Division and campus stakeholders by providing leadership and support to Divisional Budget Managers in the development of the College's annual operating and capital budgets.
- Develop organizational structure, technical and analytical skill sets, systems, and processes to support budget, financial planning, modeling and analysis functions.
- Develop and maintain budget models and tools to administer the current year budget, multi-year budgets and dashboard sensitivity analyses.
- Monitor the results of operating and capital budgets, analyze performance against budget for key metric indicators, prepare variance reports, and provide summary budgetary status on a regular basis to increase understanding and improve decision-making.
- Perform financial analyses in key operating revenue and expense areas to identify key drivers, trends, benchmarks, risks, and opportunities, and recommend appropriate action.
- Develop and use complex systems, databases, and report writing queries to extract, analyze, summarize, and report data.

- Perform financial modeling and financial analysis, ensuring consistent integration of key budgetary and financial information to support institutional goals.
- Perform complex scenario modeling as required for feasibility studies, process improvement/re-engineering analyses, benchmarking, and strategic planning development.
- Maintain employee position and salary information in partnership with Human Resources.
- Assist in the preparation of management reports for senior leadership and the Board of Trustees.
- Provide financial data and reports to external agencies and organizations as necessary and assist with external survey requests.
- Work independently, under broad organizational guidelines, to provide analytical support and manage departmental and divisional requests for information and ad hoc reporting.
- Complete special projects and other duties as required, requested, delegated, or assigned.



APPLICATION & NOMINATION PROCESS



CBIZ EFL Associates (<https://eflassociates.cbiz.com>), an executive search firm, is assisting **Oberlin College and Conservatory** with its search for this important leadership position. All calls and inquiries should be made through the search firm. Nominations and applications will be held in strict confidence and candidates will remain confidential until the final stage of the search, at which time the express permission of finalists will be obtained before making their candidacy public.

- **STEP 1:** Complete a brief online application (2-3 minutes)
 - <https://www.surveymonkey.com/r/OCC-DBFP>
- **STEP 2:** Send us your cover letter and résumé or curriculum vitae
 - Send in **PDF format**
 - Send to ApplyHigherEd@eflassociates.com
 - Email subject line should read **"Oberlin College - DBFP Application"**
- For best consideration, apply by February 12, 2024.
- Review of applications will begin immediately.

Confidential Inquiries

Steve Waldron, JD
Managing Director, Higher Education Practice
816-945-5423 (direct) swaldron@eflassociates.com

Application Questions & Nominations

If you would like to provide a nomination, please email all pertinent information (including an email address and phone number of the nominee) to:

Edith Ketay
Project Manager
816-831-4001 (direct) Edith.Ketay@eflassociates.com