Opportunity and Challenge Profile

Chief Executive Officer, Cal Poly Corporation
San Luis Obispo, CA

Cal Poly Corporation (the Corporation) is a duly recognized 501(c)(3) public benefit non-profit corporation and auxiliary organization of the California State University System, serving and supporting the educational mission of California State Polytechnic University, San Luis Obispo (Cal Poly). The Corporation seeks an innovative, entrepreneurial and experienced Chief Executive Officer (CEO) to lead this substantial and complex operation into its next evolution of ambitious plans for the future. With annual revenues in excess of $100 million and over $200 million in assets, the Cal Poly Corporation employs over 230 full-time employees as well as over 3,200 part-time and students.

Reporting to Cal Poly’s Senior Vice President of Administration and Finance and serving as a member of the President’s Cabinet and the Administration and Finance Senior Leadership Team, the CEO will provide innovative leadership and vision for Cal Poly Corporation-administered programs, services and facilities. To this end, the CEO will be instrumental in developing and leading key partnerships with the University, alumni and public/private industry to enhance resources and services in support of the University’s mission.

To learn more about Cal Poly Corporation, please visit: http://www.calpolycorporation.org

The CEO will lead the Cal Poly Corporation to be a key partner to the President and the University at a pivotal and ambitious time, and will be expected to balance strategic and visionary thinking with the detailed and pragmatic focus necessary to address the following opportunities:

- Enhance the role of the Corporation as a key strategic partner to Cal Poly
- Leverage existing and new relationships with University partners
- Lead the Corporation’s overall operational strategy and ensure its integrity and effectiveness
- Energize and develop Corporation staff and employees

Cal Poly

California Polytechnic State University (Cal Poly) is a distinguished public undergraduate and master’s level institution located in San Luis Obispo. Cal Poly is led by an energetic and creative President and senior leadership team and a campus community committed to an ambitious academic vision. With an outstanding student body and a highly dedicated and talented faculty and staff, the university aspires to be the nation’s premier comprehensive polytechnic university, developing and inspiring whole system thinkers through teaching, scholarship, and the co-curricular experience to become the future leaders and innovators in California and the world. Founded in 1901 as one of 23 universities in the CSU system, Cal Poly is one of only five comprehensive polytechnic universities in the nation. Characterized by its “Learn by Doing” philosophy and unique teacher-scholar model, Cal Poly prepares its students to think critically, communicate effectively, contribute positively to society, and be lifelong learners. As such, the institution has emerged as one of the leading public universities in not only the state of California, but in the entire country. For the 27th straight year, Cal Poly has been named the best public masters-level university in
the West by both U.S. News & World Report and Forbes Top Colleges. Additionally, Business Insider magazine has determined that Cal Poly is among the top 40 public institutions in the country in terms of smartest students.

**Cal Poly's Vision and Mission**

Vision: Cal Poly will be recognized as the premier comprehensive polytechnic university, with an unmatched reputation for promoting Learn by Doing and nurturing student success.

Mission: Cal Poly fosters teaching, scholarship, and service in a Learn-by-Doing environment in which students, staff, and faculty are partners in discovery. As a polytechnic university, Cal Poly promotes the application of theory to practice. As a comprehensive institution, Cal Poly provides a balanced education in the arts, sciences, and technology, while encouraging cross-disciplinary and co-curricular experiences. As an academic community, Cal Poly values free inquiry, cultural and intellectual diversity, mutual respect, civic engagement, and social and environmental responsibility.

**Strategic Planning**

The Cal Poly University 2018-2023 Strategic Plan has seven strategic priorities that focus on the themes of our people, our programs and our support infrastructure. The plan is available at [https://strategicplanning.calpoly.edu/](https://strategicplanning.calpoly.edu/).

Our People:
- Enhance the Success of All Cal Poly Students
- Cultivate the Excellence of our Faculty and Staff

Our Programs:
- Develop a Rich Campus Culture of Diversity and Inclusion
- Strengthen our Portfolio of Academic Programs
- Create an Engaged, Vibrant and Healthy Community

Our Support Infrastructure:
- Leverage Data and Technology to Support the Institution’s Mission
- Secure our Future by Improving our Finances, Facilities and Systems

**Role of the CEO**

Reporting to Cal Poly’s Senior Vice President of Administration and Finance and serving as a member of the President’s Cabinet and the Administration and Finance Senior Leadership Team, the CEO provides innovative leadership and vision for Cal Poly Corporation-administered programs, services and facilities. To this end, the CEO is instrumental in developing and leading key partnerships with the University, alumni and public/private industry to enhance resources and services in support of the University’s mission. Responsible for leading strategic planning and direction for the Corporation while working to establish financial and programmatic goals that ensure long-term financial viability of the organization, the CEO will continuously improve and evolve business models to promote innovation and efficiency. The CEO is charged with providing responsible stewardship of the assets and resources of the Cal Poly Corporation. In addition, the CEO will provide administrative management of specific endowments, trusts and gifts provided to the University; fiscal management and oversight of contract and grant activities for sponsored programs; and assistance to the College of Agriculture, Food and Environmental Sciences in the management of commercial agriculture operations.
Corporation administration includes the executive office, business and finance, information technology, human resources, marketing and communications, corporation counsel, facilities operations and capital projects, and business and concept development. The CEO will also provide leadership to and collaborate with the Corporation’s Board of Directors. The board, comprised of university administrators, faculty, community members and students, is committed to supporting the educational mission of Cal Poly. The CEO is responsible for coordination of all activities related to the Corporation Board of Directors to include board development, education, communications and management. Please see the Appendix for a more detailed description of the areas of responsibility for the CEO.

**Key Opportunities and Challenges for the CEO**

In leading Cal Poly Corporation into its next stage of innovation and excellence in support of Cal Poly, the CEO will address several key opportunities and challenges, described below:

*Enhance the role of the Corporation as a key strategic partner to Cal Poly*

The CEO will be called upon to expand the Corporation’s thinking and sense of identity in being a critical partner and revenue generator for the University in the spirit of the institution’s strategic plan. This will entail holding a view of the Corporation as an important and integral part of a larger ecosystem that is entering a new paradigm: one of enhancing Cal Poly’s reputation, diversifying revenue streams, extending its range of activities and leveraging the unique attributes of the region in support of economic development.

A strategic thought partner to Cal Poly’s President Jeff Armstrong, the CEO will lead the Corporation to assist in advancing the University’s ambitious growth plans, employing entrepreneurial thinking, considering transformative ideas and exploring the potential of PPPs, among other possibilities. As a member of the Cabinet, the CEO will represent the Corporation’s contributions in discovery, exploration and vetting of new ideas and projects and will facilitate prioritization, delivery and risk management of viable initiatives. At the same time, the CEO will need to manage expectations, offer alternatives, and be able to communicate impacts. The CEO will also explore new joint structures for idea exploration going forward.

*Leverage existing and new relationships with University partners*

The CEO will lead the Corporation to be an outstanding and creative partner to new entities and existing key relationships on campus and in the broader Cal Poly community, mindful of its impact and responsiveness. A close partner with and report to the SVP Administration and Finance, the CEO will ensure effective communications and information sharing between the Corporation and the Division. Of importance, the Corporation partners with Student Affairs and University Housing in managing food and dining services and related facilities, as well regarding other capital projects impacting student experience and services. The CEO will be a role model in being a visible, engaged and collaborative, consensus builder who builds and nurtures relationships and seeks solutions. In finding synergies, effectively triaging ideas and requests and exploring new approaches, the CEO will help to skillfully navigate the headwinds of bureaucracy while moving joint aims forward. It will be important that the Corporation provides transparency and is willing to educate others on the nature of its operations and boundaries. It will also be essential to navigate multiple opinions and inputs with sensitivity.

The CEO will work energetically with Academic Affairs to seek potential investment in strategic
directions, particularly with regard to the development of Sponsored Programs and as well with the College of Agriculture, Food and Environmental Sciences, the Center for Innovation and Entrepreneurship and other centers on campus. With a new Vice President for Research having recently joined Cal Poly, there is an exciting opportunity to support ambitious new research growth with sponsored programs support in systems, staffing and processes, and in new ways to facilitate faculty scholarship.

In looking beyond the campus, the CEO will also be an active player in the external community through the relationships with the Performing Arts Center, business organizations in the region, as well as colleagues in other CSU auxiliary organizations.

**Lead the Corporation’s overall operational strategy and ensure its integrity and effectiveness**

The Corporation is in Year Two of a three-year strategic plan and the CEO will join at a moment in time to review progress and strategically prioritize execution among a number of remaining initiatives and goals, as well as begin to tee up the next strategic planning process. Bringing strong business and financial acumen, the CEO will be a mindful and outstanding steward of the stability and integrity of this substantial enterprise on all measures: financial, operational, systems, legal, marketing and branding, human resources and employee satisfaction and sustainability. Alongside this approach, the CEO will consider the reinvention or adaptation of processes to address new opportunities, look for synergies, and be an effective and compassionate change leader where appropriate.

The Corporation is in a good financial position and must be self-sustaining. Therefore, the CEO will oversee management of risk in partner relationships, contracts and negotiations, maintain appropriate separations and boundaries, and ensure funding capability. Key operational areas of service will need to be reviewed and their impact and effectiveness assessed to make appropriate decisions aligned with Cal Poly’s mission, overall strategy and the Corporation’s capabilities and capacity. The CEO will work with the Board of Directors to review strategy, results and approve budgets, understanding their vested interests and commitments.

**Energize and develop Corporation staff and employees**

The CEO will lead the staff and employees in further developing a Corporation culture that is adaptive, entrepreneurial, creative, responsive and mission-oriented, during a very demanding and expansive time. This will include a consultative approach to decision-making, alongside cultivating resilience and demonstrating empathy through potential change management. In moving forward, the CEO will leverage and mentor a capable team of direct reports and develop professional staff to be leaders and role models in their own areas, provide appropriate professional development opportunities. The CEO will also ensure there are structures and channels for input and idea generation and encourage innovation at all levels of staff and student employees. The CEO will be attentive to matters of diversity, equity and inclusion in hiring, retention and policies and ensure that all feel fairly treated and empowered to contribute to the overall mission.

**Required education, experience and credentials**

**Education and Experience:**

- Bachelor’s Degree in relevant business-related discipline. Possession of substantial leadership experience in an administrative capacity.

**Licenses, Certificates, Credentials:**

- N/A
Preferred credentials and experience

- CPA or MBA.
- A minimum of eight years progressively responsible professional experience in a large, complex organization, and five years management experience including the supervision of professional staff.
- Demonstrated skills in an institutional or higher educational environment utilizing a customer-oriented and service-centered attitude.

Preferred skills, knowledge and abilities

- Thorough knowledge of internal control principles and practices, especially as related to public universities.
- Knowledge of State and Federal law related to higher education financial issues.
- Ability to provide leadership and structure for development of the organizational unit, including a review and development of strategies to enhance the capabilities of individuals and of the entire organization.
- Knowledge of non-profit organizations, commercial and retail operations, investment management and fiscal and facility management.
- Demonstrated success and ability to engage in strategic planning, developing and implementing principles, standards and guidelines to ensure the most effective and efficient delivery of programs and services.
- Ability to develop policy and procedures to ensure sound business practices.
- Proven record of developing fiscally successful, innovative programs and services. Ability to plan complex budgets and allocate resources based upon program priorities.
- Commitment to quality service and the mission and values of a comprehensive polytechnic university, demonstrated customer service experience requiring a very high level of diplomacy and professionalism.
- Strong interpersonal skills effective in working with a wide variety of constituencies and a diverse campus community. Ability to develop partnerships with the University, community, and public/private industry to enhance resources and services to support the goals of the University.
- Demonstrated conflict resolution skills. Ability to exercise discretion, independent judgment and reason logically in carrying out responsibilities.
- Demonstrated ability to lead, manage and supervise a diverse staff in a dynamic environment that requires department and staff members to adapt to changing processes, practices and initiatives.
- Thorough knowledge of applicable professional ethics and standards.
- Excellent communication skills; ability to effectively communicate information in a clear and understandable manner, both verbally and in writing.
- Demonstrated ability to maintain a high degree of confidentiality.
- Working knowledge of or ability to quickly learn University infrastructure, policies and procedures.

Location and Compensation

San Luis Obispo, a coastal city halfway between Los Angeles and San Francisco and 15 minutes from the Pacific Ocean, has a population of approximately 48,000, and an economy based largely on tourism, agriculture, and the University. The region has a mild, Mediterranean climate, which residents enjoy year round. The city has numerous attractions, such as a vibrant Performing Arts Center housed in a world-class venue, a weekly Thursday night Farmer's Market, close proximity to many excellent vineyards, hotels, restaurants, and opportunities to enjoy local produce and goods. The San Luis Obispo Regional Airport offers daily commercial air service to nine areas. (Los Angeles, San Francisco, Phoenix, Dallas, Denver, 

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Seattle, Las Vegas, Portland, and San Diego major airports, and Amtrak offers daily rail service to various California locations.

Salary is commensurate with the background and experience of the individual selected: [https://afd.calpoly.edu/hr/benefits/](https://afd.calpoly.edu/hr/benefits/)

**Inquiries, Nominations, and Applications**

Inquiries, nominations, and applications should be sent via the Isaacson, Miller website for the search: [www.imsearch.com/7373](http://www.imsearch.com/7373). Applicants should provide a detailed resume and cover letter.

The search committee will review nominations and applications until the position is filled. For best consideration, applicants should provide full materials by the end of February. The anticipated starting date for the position is Summer, 2020.

At Cal Poly, 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 Poly is an affirmative action/equal opportunity employer.
Appendix

Cal Poly Corporation CEO: Essential Job Functions

1. Responsible for the leadership and administration of all aspects of Cal Poly Corporation operations.
2. Provide strong stewardship and oversight of the assets and resources of the Corporation.
3. Develop and implement strategic planning for the Cal Poly Corporation; review and monitor operating results and adjust tactics as needed.
4. Develop and implement organizational policies and procedures required to achieve organizational objectives, promote efficiency, and ensure sound financial practices throughout various functional and operating areas of the Corporation.
5. Coordinate and manage all activities related to the Corporation Board of Directors including board development and board member orientation, scheduling and management of board and committee meetings, development and maintenance of meeting agendas and reports, and adherence to corporate by-laws.
6. Formulate and present for Board consideration policies, procedures and recommendations involving strategic direction, budgets, contracts, leases and new initiatives; applicable compensation and benefit programs; requests by the University for services or support; programs involving insurance, investments, debt issuance and management; audits and reporting of financial and operating results.
7. Direct and supervise the overall human resources function of the Corporation including, but not limited to, affirmative action, talent acquisition and management, benefits, training and development, safety and employer labor law and regulatory compliance.
8. Provide oversight and direction to the campus dining program under the programmatic direction from Student Affairs with a focus on delivery of high quality products and services to the campus community; responsible for all retail, concessions and catering operations -- providing financial controls and budgetary oversight; appropriate staff training; food pricing and meal plans; staffing plans; operation, maintenance and planning for equipment and facilities; custodial and sanitation standards; and robust food safety and customer satisfaction programs.
9. Provide oversight and direction, through the third-party partner/contract, for the operation of the university bookstore. Partner with the bookstore operator ensuring the provision of high-quality products and services and a robust customer satisfaction program; monitor operating results and the financial return to the university; and ensure adherence to the terms of the operating agreement.
10. Direct and monitor, through the Associate Executive Director of Business and Finance, the overall financial operations and fiscal controls of the Corporation.
11. Provide support for the financial and business oversight of Sponsored Programs Administration and the commercial agriculture operations within the College of Agriculture, Food and Environmental Sciences.
12. Steward (with campus partners) various real estate holdings including Bella Montana faculty/staff housing community, Swanton Pacific Ranch, Technology Park and Grand Avenue rental properties. Provide, in partnership with the University, real estate acquisition assistance and management services.
13. Partner with the University to devise ways and means of leveraging assets to create mission related revenue generating enterprises, including industry, private or governmental partnerships.
14. Reimagine and direct the operation of the Conference and Event Planning unit.