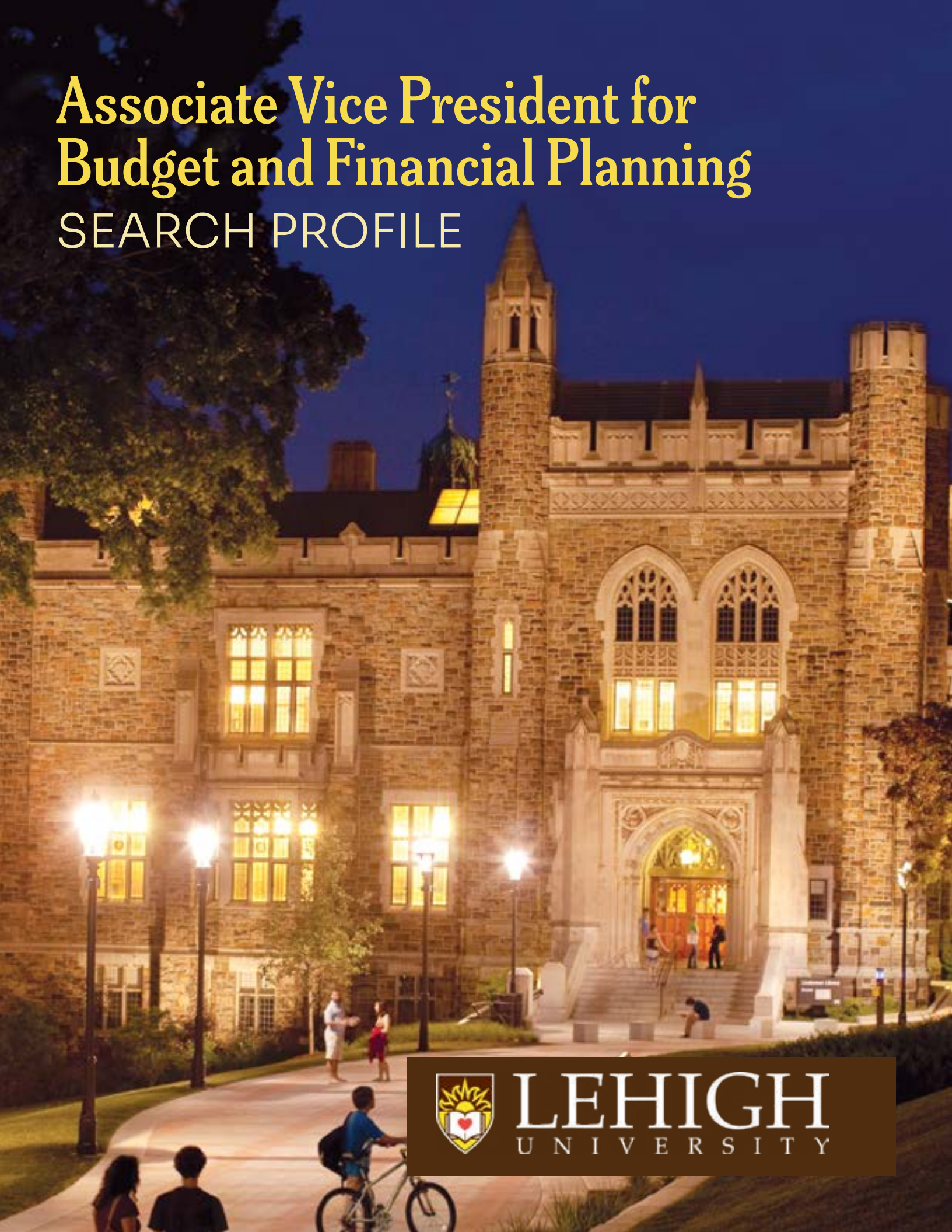


Associate Vice President for Budget and Financial Planning

SEARCH PROFILE



LEHIGH
UNIVERSITY

Position Overview

Lehigh University, a private residential R1 research university in Bethlehem, Pennsylvania, seeks a visionary and collaborative leader to serve as our first Associate Vice President for Budget and Financial Planning (AVP).

The AVP will serve as the University's senior strategic advisor to the Senior Vice President for Finance and Administration and the University Provost on enterprise budgeting, analytical modeling, and long-range forecasting. Armed with deep expertise in sophisticated data visualization, the AVP will synthesize complex, multi-dimensional financial data into compelling, actionable strategic narratives.

Through high-impact visual financial storytelling and forward-looking scenario analysis, the AVP will engage campus leaders, executive leadership, and the Board Finance Committee to shape university-wide strategic direction and elevate financial decision-making.

As an institutional systems thinker, the AVP will champion a unified, modern vision for financial agility across campus, inspiring business administrators and executive leaders to adopt data-informed planning methodologies.



This role serves as a vital strategic partner to the AVP for Finance and Treasurer, integrating operating models with debt capacity, capital financing structures, and rating-agency considerations to optimize long-term resource deployment. The AVP will manage a team including the Director of Budget and Financial Planning, ensuring seamless alignment between overarching strategic narratives and day-to-day operational budget administration.

Key Responsibilities

Strategic Financial Planning and Modeling

- Leads the University's multi-year financial planning efforts, developing financial models and forecasts that incorporate strategic initiatives, enrollment, housing, and revenue opportunities.
- Provides financial insights and recommends strategies for growth, resource allocation, and cost optimization across the institution.
- Maintains rolling forecasts and scenario/sensitivity models to support senior leadership decision-making.
- Owns the University's peer benchmarking dashboard function as a part of forecasting and financial planning. Analyzes budget and financial trends, incorporating research on peer institution practices.

Capital and Financing Strategy

- Partners closely with the AVP for Finance and Treasurer — who owns debt capacity, capital financing structures (e.g., Energy-as-a-Service and similar arrangements), and rating-agency positioning — to ensure capital and financing decisions are optimized against the operating budget and multi-year forecast.
- Coordinates multi-year capital planning with Facilities, ITS and the Treasurer's Office, contributing operating-budget and forecast impact analysis for all projected sources of funding and alignment with the strategic plan.
- Incorporates Development's projections into long-range financial models.

Board and Executive Reporting

- Collaborating closely with the SVP for Finance and Administration, the AVP presents budget performance, year-end projections, and forecasting analysis to the Board of Trustees Finance Committee.

- Advises and appraises the SVP Finance and Administration and the Provost (who serves as Chief Budget Officer) on all budget matters as the institution's forward-looking budget and forecasting voice.
- Owns revenue-stream and strategic-initiative reporting for Vice Presidents and Deans, translating budget data into the institutional narrative.

Financial Systems Strategy

- Owns systems and data architecture strategy supporting forecasting, scenario modeling, and reporting across the university's budget tool (Strata) and ERP (Banner)
- Leads evaluation of major financial planning software and platform decisions in partnership with the Budget and Financial Planning team and ITS.
- Establishes data governance practices for budgeting and planning data — definitions, standards, and validation — partnering with campus stakeholders to promote consistent reporting and reduce reconciliation effort.
- Develops and delivers contextual training content for the campus end users.

Team Leadership

- Manages and mentors the Budget and Financial Planning team, setting goals and priorities for the office as a whole.
- Fosters a culture of continuous improvement, professional growth, and data-informed decision-making across the function.
- Builds bench strength and succession readiness for key roles within the Budget and Financial Planning function.

About Lehigh

Founded in 1865 by industrial pioneer Asa Packer, Lehigh University was established to foster the “intellectual and moral improvement” of its students, preparing them to contribute to a strong national economy. Lehigh remains dedicated to its mission of teaching, research, and service, challenging students through academic rigor, an entrepreneurial mindset, and collaborative opportunities to become future leaders.

Today, Lehigh is one of the most selective private research universities in the U.S., offering programs across five colleges: the College of Arts and Sciences, College of Business, P.C. Rossin College of Engineering and Applied Science, College of Education, and College of Health. Graduate and doctoral programs are available in all five colleges.

Lehigh employs more than 595 full-time faculty, including 464 tenured or tenure-track professors, and nearly 1,300 staff members. The university has a vibrant network of more than 88,000 alumni.



Lehigh University has embraced “The Principles of our Equitable Community,” which details the collective responsibility to foster a welcoming and collaborative environment. We are committed to a culturally and intellectually diverse community and we seek qualified candidates to contribute to the university’s mission. Lehigh offers a comprehensive and



family-friendly benefits package which includes but is not limited to Health Care, Retirement and Educational benefits.

In the *Wall Street Journal's* 2025 Best Colleges in the US, Lehigh ranked 15th among the top 500 U.S. colleges and universities, and *US News & World Report* consistently ranks it among the top 50 national universities.

Find even more information about
Lehigh and our search here.



Governance and Finances

Lehigh University is governed by a board of trustees, primarily composed of distinguished business, civic, and academic leaders, many of whom are alumni and major donors with a strong commitment to the university's mission.

For the 2025-2026 academic year, undergraduate cost of attendance totals \$82,200, including tuition, fees, room and board. Lehigh prioritizes keeping tuition increases modest and provides financial aid to over 50% of its students based on need and merit. In FY 2025, the university awarded more than \$170 million in grants and scholarships. Lehigh has been recognized among the nation's "Best Value" universities by The Princeton Review and US News & World Report.

Core Balance Sheet Strengths

- **Total Assets:** Lehigh currently holds \$3.5 billion in total assets, providing substantial capital to meet short-term obligations and fund long-term projects without operational disruption.
- **Debt & Creditworthiness:** The university manages \$553 million in outstanding debt while maintaining strong AA- / Aa3 stable ratings from major credit agencies.



- **Budgeted Operating Scale:** For FY27, Lehigh's budgeted operating sources total \$549.4 million, supporting balanced cash operations, cutting-edge research, and student services.
- **Endowment Trajectory:** The endowment achieved a 10.5% 10-year growth rate as of May 2026, translating to roughly \$260,000 per full-time equivalent (FTE) student.

Independent Recognition

- **Forbes Financial Distinction:** Lehigh earned an "A+" grade in Forbes' 2026 edition of "America's Financial Grades," highlighting top-tier stewardship relative to peers across the nation.

About Bethlehem

Lehigh's home, the vibrant, diverse mid-sized city of Bethlehem (population 78,000), has been listed as among the Top 100 Best Places to Live in America. The city's historic 18th century Moravian Church settlement was recently added to the list of UNESCO World Heritage Sites, joining just 25 other sites in the United States.

The arts are alive in Bethlehem, where you won't have to look far to find exciting seasonal events, nationally recognized musical acts, comedy, art and more. The city boasts three performing arts centers on the SouthSide alone. This year, the ArtsQuest Creative Factory will open just steps from Lehigh's Campus, providing a greatly expanded state-of-the-art visual, performing arts and educational hub for the city.

Known as the "City of Festivals," Bethlehem hosts more than 20 major festivals and over 150 mini-festivals each year.

The city is conveniently located in the growing Lehigh Valley region, 50 miles from Philadelphia and 75 miles from New York City.





Leadership

Lehigh University President Joseph J. Helble, '82 became his alma mater's 15th president in August of 2021. Since arriving, he led the development of an ambitious vision for the university's future, our exciting 10 year strategy, *Inspiring the Future Makers*.

After graduating with highest honors from Lehigh in 1982, Helble earned his PhD in chemical engineering, with a minor in Spanish, from the Massachusetts Institute of Technology in 1987.

He worked for several years in the private sector as a research scientist at Physical Sciences, Inc., during which time he also spent several months on leave as a science policy fellow with the U.S. Environmental Protection Agency. Later, as the American Association for the Advancement of Science (AAAS) Revelle Fellow, he spent a year in Washington, D.C., on the staff of the United States Senate, working on environmental and technology policy.

Helble came to Lehigh from Dartmouth College, where he served as provost from 2018-2021 and dean of engineering from 2005-2018. Prior to Dartmouth, Helble served as professor and chair of chemical engineering at the University of Connecticut. His research interests

have included studying the environmental impacts of fossil energy utilization with an emphasis on mercury and particulate matter (PM) air pollutants, exploring technologies for CO₂ capture, and developing approaches to produce nanostructured ceramic powders. He has authored more than 100 publications and holds three U.S. patents.

Christine Cook has served as the **Vice President for Finance and Administration** since July 2024 and **Senior Vice President** since May 2026. She joined Lehigh in

January 2022 as the Vice President for Strategic Planning and Initiatives. Leading the administrative arm of the university, the Vice President serves as executive sponsor for non-academic capital projects.

Chris worked at the University of Delaware for 23 years in various roles across the campus, gaining expertise about higher education administration. At UD she served as the Associate Provost for research administration as well as the Senior Business Officer for the College of Engineering. She then headed to Dartmouth College where she served as the Chief Administrative and Financial Officer for the Thayer School of Engineering and, eventually, Vice Provost for Resource Planning and Initiatives.



7,909

students
(undergraduate &
graduate)

11:1

student-to-faculty
ratio

\$77K

average starting
salary of 2025
graduates

\$2.3B

Lehigh's endowment
benefiting
current and future
generations of
students

26

NCAA Division 1
intercollegiate
sports for men and
women

40%

students who have
an international
experience while at
Lehigh

Facts and Figures

94%

undergraduates
participate in an
extracurricular
activity

200+

student
organizations

250+

arts events on
campus annually

100

countries
represented on
campus

94%

retention
rate

124

undergraduate
degree programs
and majors



[More Facts and Figures](#)

Lehigh welcomes nominations for the Associate Vice President of Budget and Financial Planning position. In your nomination please include the name, current title, and contact information for your nominee along with your comments.

All nominations should be directed to Aubrie Sobieski, HR Manager for Talent Acquisition, via email at auf214@lehigh.edu



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