San Jose State University Research Foundation

Position: FINANCIAL OPERATIONS ANALYST

DEPARTMENT: Office of Sponsored Programs and Finance and Accounting

IMMEDIATE SUPERVISOR: Director of OSP; Director of Finance & Accounting

POSTING DATE: May 20, 2019

CLOSING DATE: Open Until Filled

SALARY: $72K to $89K range
Full time, benefited position

EXEMPT STATUS: Exempt level position

GENERAL NATURE OF POSITION:

The SJSU Research Foundation Office of Sponsored Programs (OSP) partners with the SJSU Office of Research to assist faculty in the pursuit of external funding for sponsored research, service projects, and other discretionary activities. OSP serves as the central coordination point for all grants and contracts, and works closely with Principal Investigators (PIs) to ensure compliance with Federal, state, and institutional policies. The Finance and Accounting F&A Department of the San Jose State University Research Foundation provides financial and administrative support services.

As a member of the OSP and Finance Team, the Financial Operations Analyst will be acting in a dual role and capacity within both OSP and F&A. The incumbent will closely work with and actively advise department managers as they develop their budgets, and will document and report upon their budget submissions. In addition, the incumbent will also provide analysis of trends and developments of the operations pertaining to increases or decreases with proposal submissions and grant awards.

ESSENTIAL DUTIES & RESPONSIBILITIES: The incumbent will:

1. Closely work with OSP Pre/Post Managers and Finance staff in order to project F&A revenue for current fiscal year budget and long term budget models.

2. Regularly interact with department managers to advise them as they develop their budget submissions. Will review proposed budget submissions from department managers for accuracy and completeness, ensuring that actual and potential trends have been taken into account.

3. Analyze annual department budgets to determine whether they can be achieved based on known capacity constraints. Ensure that management is aware of potential problem areas, and propose enhancements or solutions to the budget model.

4. Compare actual to budgeted results at the end of each reporting period. Analyze and report on significant variances and causes of those variances. Update the budget model as requested to account for significant changes in the business environment. Initiate, analyze and submit for review the F&A distribution models/projects on a quarterly basis.
5. Maintain and update the budgeting policies and procedures manual.

6. Use the Adaptive Insights financial software to enter information, such as setting up budgets, Projects, and Tasks, based on identified grants and contracts F&A/administrative fee revenue.

7. Closely track and monitor actual expenditures versus projected budgets, using Adaptive Insights, OneSolution, and Excel spreadsheets for the analysis and tracking in support of department managers.

8. Support the Directors of Finance and OSP to update and maintain short-range/long-term financial plans, forecasts, and updates. Also actively supports Self Support Programs like the Timpany Center and MLML marine operations.

9. Prepare financial status updates on grant expenditures and long term F&A revenue projections for RF Management and external stakeholders.

10. Actively assist in providing month end close and audit support to the Finance team and communicating accounting and reporting issues to regulatory agencies by reviewing, analyzing, and preparing supporting documents and other related materials.

11. Assist in preparing and providing data and reports for all Board of Directors meetings. Draft and prepare reports based on specific instructions.

12. Respond to internal and external customer inquiries regarding grants. Act as a liaison to other departments, senior management, regulatory agencies, auditors, and financial institutions, as requested.

13. Prepare various periodic standard and ad hoc reports from OneSolution and Adaptive Insights for RF Management, funding partners or regulatory agencies.

14. Other duties and tasks as assigned.

INTERPERSONAL CONTACTS:

- Reports to both the Director of OSP and the Director of Finance and Accounting.
- Interacts with internal office staff (Human Resources, Contracts and Grants, and Finance and Accounting) on a daily basis.
- Also interacts, as appropriate, with SJSU faculty and staff, as well as with outside local, state, and federal agencies. Also interacts with auditors, as appropriate.

QUALIFICATIONS:

1. Education
   - A Bachelor's degree (B.A. /B.S.) from four-year college or university, with emphasis in accounting, finance, business, or related field, is required.

2. Experience
   - Three years’ experience in finance, preferably in a grants financial management position or in a complex financial analysis capacity; or an equivalent combination of education and experience is required.
   - Non profit industry experience desirable.
   - One years’ experience in project management, including coordinating with multiple internal and external partners to complete projects on time.
   - Two years’ experience in budget preparation and contractual negotiations.
   - Experience in promoting a culturally competent and diverse work environment.

3. Knowledge, Skills, Abilities required
   - Working knowledge of GAAP (Generally Accepted Accounting Principles).
   - Solid working knowledge of Federal/State sponsored programs administration, and OneSolution and Adaptive Insights is highly desirable.
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- Accuracy in development of complex budgets.
- Thorough knowledge of current computer and office automation equipment and software required. Proficient in Internet research, MS Office, spreadsheets or other applicable software packages.
- Excellent communication and writing skills is essential.
- Excellent interpersonal skills to develop and maintain cooperative and productive working relationships with Foundation colleagues, faculty, and representatives of various organizations and agencies.
- Ability to prioritize tasks, to work independently, to maintain confidentiality, and to take initiative to improve upon current operations.
- Ability to work in an unusually fast paced environment, and handle multiple deadlines and tasks with diplomacy under pressure.
- Excellent judgment, independent creative problem solving skills, and attention to details.

4. Physical Requirement

- Must be able to operate a PC including mouse and keyboard.
- Must be able to operate general office equipment.
- Must be able to sit and stand for extended periods of time.
- Visual acuity associated with concentrated computer use.

5. Complexity of Duties

- Works on a variety of problems of complex scope, where analysis of data or solutions requires an evaluation of intangible, variance factors. Exercises independent judgment in developing methods and evaluating criteria for achieved results.
- Must be able to act on critical issues in an independent manner.
- Erroneous decisions or recommendations, or failure to get results would cause additional costs and personnel, and serious delays in overall schedule.

SUPERVISORY RESPONSIBILITIES:

No formal supervisory responsibilities, though will project lead and advise.

6. Benefits

The comprehensive benefit package includes:

a) Nine health insurance plans to choose from
b) Free dental and vision for employee and eligible dependents
c) Paid Federal & State Holidays
d) Retirement Plan: 403 (b) employee contribution plan component and a 403 (b) employer contribution component
e) Vacation and separate sick plans
f) Employee Discounts
g) Paid Training and Conferences
h) Paid Training and Conferences

PLEASE NOTE: This position is considered a “sensitive” position by SJSURF and CSU policy. Consequently, the successful candidate must undergo and successfully complete the Live Scan (fingerprinting) background check as a condition of their employment. This background check must be completed before the actual start of employment.

This position description intends to describe the general nature and level of work being performed by people assigned to this job. It is not intended to include all duties and responsibilities. The order in which duties and responsibilities are listed is not significant.
APPLICATION PROCEDURE
To apply for this position, an applicant must submit a formal application for employment, as well as a resume and a cover letter. The applicant may do this via e-mail or by regular mail. The formal employment application is located at
http://www.sjsu.edu/researchfoundation/open/Employment%20Application%20Form_new.pdf

It may also be obtained from the Research Foundation through its web site at

An applicant may also apply in person by visiting the Research Foundation, located at 210 North 4th Street, 4th Floor, San Jose, CA (corner of St. James and North 4th Streets). Please address your formal application, your resume and your letter of interest directly to:

San Jose State University Research Foundation
Attn: HR/Job Code OPS ANALYST
210 North 4th Street
San Jose, CA  95112
E-mail: foundation-jobs@sjsu.edu

Reasonable Accommodation:
The San Jose State Research Foundation is committed to providing access, equal opportunity and reasonable accommodation for individuals with physical or mental disabilities in the employment, recruitment, examination, hiring and interviewing processes. If you are a job seeker with a physical or mental disability and require a reasonable accommodation to search, apply, or interview for a job opening or otherwise need a reasonable accommodation during the application and hiring process, please contact us at foundation-jobs@sjsu.edu. In the email message, please indicate your full name, phone number and the type of assistance required. You must not reveal the underlying medical reason for your needed reasonable accommodation or otherwise disclose confidential medical information. You may also call (408) 924-1400 from 8:00am to 5:00pm (PST), Monday through Friday, excluding holidays, to get assistance.

The Research Foundation provides excellent benefits package to benefited employees. Please visit http://www.sjsu.edu/researchfoundation/humanresources/healthbenefits/index.html to get more details.

Research Foundation employment is separate and distinct from San Jose State University or State of California employment. Research Foundation employees are not employees of either SJSU or of the state of California.

The San Jose State University Research Foundation (SJSURF) is a non-profit auxiliary of San Jose State University. SJSURF is totally self supported. The majority of the organization’s funding comes from the federal government, and other public and private entities. With annual revenues totaling over $65 million, programs managed through SJSURF cover a rich diversity of applied research, public services, and educational related activities.

SAN JOSE STATE UNIVERSITY RESEARCH FOUNDATION is an Equal Opportunity Employer and does not discriminate on the basis of race, color, creed, gender, religion, marital status, registered domestic partner status, age, national origin, ancestry, physical or mental disability, medical condition, sex, genetic information, sexual orientation, military and veteran status or any other consideration made unlawful by federal, state, or local laws. It also prohibits unlawful discrimination based on the perception that anyone has any of those characteristics, or is associated with a person who has or is perceived as having any of those characteristics.

A background check (including a criminal records check) must be completed satisfactorily before any candidate can be offered a position with the SJSURF. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current SJSURF employees who apply for the position.