

# San José State University Research Foundation

## Position: Director, Finance and Accounting

DEPARTMENT:	Finance & Accounting
IMMEDIATE SUPERVISOR:	Executive Director
POSTING DATE:	July 25, 2022
CLOSING DATE:	Until Filled
SALARY:	\$153,000-\$163,000 Annually Negotiable, DOQ/E
EXEMPT STATUS:	Exempt, Full-Time, Benefited

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### GENERAL NATURE OF POSITION

This position provides senior level leadership and operations management for activities in support of the San José State University Research Foundation (SJSURF)'s \$59 million in annual revenues and assets. The director of Finance and Accounting ensures sound fiscal policy, budget planning/control, cash management and reporting in accordance with the California State University Auxiliary compliance standards, as well as with all other required local, state and federal agencies. The director develops, implements, and manages financial procedures and standards. Serves as primary liaison to the Board's Finance and Investment Committee, and serves on the organization's IRS Section 115 Retiree Health Trust. The director reports to the executive director and directly manages a staff of three, and indirectly manages a staff of approximately 14, including Risk Management, Accounting, Self-Support Programs and Financial Analysis.

The director of Finance and Accounting also actively contributes to the strategic direction of SJSURF by collaborating with the business unit director and the executive director in developing and implementing financial technology systems, policies, programs and procedures for the organization.

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### ESSENTIAL DUTIES & RESPONSIBILITIES

1. Leads, directs and oversees the SJSURF's Finance and Accounting function in keeping with the needs and competencies of the institution. An active member and contributor in the senior leadership team. Provides direct supervision to three employees. Primary signer of the checks.
2. Provides ongoing management and direction of Central Office budgets as well as the annual SJSURF budgeting process. Manages department operating budget of approximately \$1.7 million and SJSURF's reserve budget. Reviews and manages monthly budget reports.
3. Ensures appropriate compliance with Uniform Guidance regulations, GAAP, GASB, AICPA, and the CSU in all areas of the Finance and Accounting department in addition to compliance with all federal, state, and local regulations.

4. Prepares and presents in the Board of Directors, Finance Committee, 403b Retirement Plan Committee and Retirement Medical Trust meetings.
5. Implements, modifies, and manages existing Finance and Accounting systems, policies and procedures to increase efficiencies within the department. Leads and provides overall direction for workflow implementation efforts.
6. Ensures that excellent customer service is extended and maintained as to all stakeholders and clients, internal and external.
7. Provides financial and administrative leadership, management and oversight for approximately \$60 million in direct and indirect revenues for contracts and grants. Ensures proper and compliant financial and other institutional reporting.
8. Provides overall direction, support, and management to the Research Foundation's audits, including the single audit. Assigned liaison with outside firms and agencies. Provides formal responses for external audits and reviews such as CSU, federal agencies, state agencies, IRS etc. Manages the post-retirement medical trust (RORMT) and the 403 (b) audits.
9. Oversees a number of administered cost centers including the Moss Landing Marine Laboratories, I-House, Timpany Center, and others.
10. Prepares SJSURF's fringe benefit proposal each year. Manages indirect cost proposal, including vacation pool implementation.
11. Provides direction and management of investments in collaboration with investment firm.
12. Establishes and maintains effective communications and collaborative working relationships with university administrators, faculty, staff, federal, state, and private agencies and community partners. Participates in professional conferences or meetings, as appropriate. Serves on university committees as appropriate or required.
13. Performs other duties, as assigned.

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## INTERPERSONAL CONTACTS

- 1) Reports to the executive director of the SJSURF.
- 2) Regularly interacts with SJSU finance team, college deans, department chairs, faculty, other university personnel, and sponsoring agencies. Interacts with Central Office staff at all levels on a regular and frequent basis.

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## SUPERVISORY RESPONSIBILITIES

Provides direction and directly oversees the Finance and Accounting team. Four direct reports: Self-Support program manager, controller, financial analyst and business & risk management analyst.

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## QUALIFICATIONS

### Education and Experience

- Directly relevant professional, personal and lived experience that translates into successful completion of the listed essential duties and responsibilities including:
  - a) Financial operations and management
  - b) Externally funded grants and contracts

- c) Leading and managing teams
- d) Regulatory/compliance matters
- e) Non-profit accounting and board structure
- CPA certification is preferred.
- Proficient skills in MS Office, G-Suite, and related productivity tools.

#### **Knowledge, Skills, Abilities Required**

- Knowledge of current financial accounting and reporting requirements for higher education (GASB and FASB).
- Knowledge of ERP and financial reporting systems. Experience with the design and implementation and conversion of accounting systems is highly desirable.
- Advanced level knowledge of principles, policies, practices, compliance rules and regulations relative to administration of federal and state grants and contracts, including knowledge of Uniform Guidance terms and conditions, as well as other federal, state and local regulations governing the financial affairs for 501(c)(3) not for profit organizations is preferred.
- Working knowledge of methodology and preparation of indirect cost proposals including fringe benefits pool through the Department of Health and Human Services (DHHS).
- Highly effective analytical skills and negotiating skills is required.
- Must have demonstrated strong written communication skills.

#### **Complexity of Duties**

- Works with minimal direction on all assigned projects.
- Exercises independent judgment in the management and completion of a diverse set of concurrent tasks, including leading specific development efforts.
- Works on complex problems where analysis of data or solutions requires an evaluation of intangible, variance factors.
- Exercises independent judgement in developing effective networks, resources, and methods for evaluating criteria for achieved results.
- Prepares, edits, synthesizes, oversees, and/or approves all manner of financial, compliance, and other reports.

#### **Physical Requirements**

- Frequent and ongoing use of a computer terminal to conduct a variety of the more advanced clerical functions and communications;
- Periodic regular lifting, walking, and carrying of files, documents and other related materials. Incumbents must have the ability to lift and carry 25 lbs. with or without aids.
- Strength, dexterity, and coordination and/or ability to use a computer keyboard and read a video display terminal on a regular basis.
- Ability to listen to verbal requests from customers, clients, and vendors, and to respond appropriately.
- Frequent need to reach for items above and below desk level, sometimes with assistance of a step-stool.
- Standing and sitting for long periods of time is periodically required.

**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.**

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**NOTE:** 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.

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## **BENEFITS**

The San José State University Research Foundation (SJSURF) provides excellent benefits package to benefited employees. **The comprehensive benefit package includes:**

- a) Nine company subsidized CalPERS health insurance plans to choose from (employee contributions differ according to plan and level of coverage).
- b) Employer paid dental and vision for both employee and eligible dependents.
- c) Life, AD&D, LTD with supplemental coverage opportunities.
- d) 14 paid federal & state holidays.
- e) Retirement Plan: 403 (b) employee contribution plan component and a 403 (b) employer contribution component, which vests immediately.
- f) Vacation hour accruals and separate sick hour accumulations.
- g) Employee discounts.
- h) Paid training and professional development conferences.
- i) Hybrid work schedule

Please visit the [Benefits & Compensation page](#) on the SJSU Research Foundation website for more detailed information.

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## **COVID-19 VACCINATION POLICY**

As required by the CSU Vaccination Policy, all new hires must be fully vaccinated against COVID-19 starting on September 30, 2021. Fully vaccinated means it has been 14 days after the second dose of the Pfizer or Moderna vaccine has been given, or it has been 14 days after the one dose of the J&J vaccine has been given. Additionally all employees are required to have booster shots and provide proof to SJSU by 02/28/2022 or after the six months from the final dose of the original vaccination, whichever is later. Proof of being fully vaccinated does not need to be disclosed until a job offer has been made, and proof must be submitted after the acceptance of the job offer. New hires may request a reasonable accommodation of the COVID-19 vaccination requirement based on medical or religious reasons. New hires must submit their request for an accommodation form after they accept the job offer, and before their scheduled start date. The reasonable accommodation provided to the employee, if any, will depend on the employee’s job and the applicable facts, but it may include weekly COVID-19 testing. New hires who do not submit, before their scheduled start date, proof of being fully vaccinated or a request for reasonable accommodation will have their job offer revoked.

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## 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 formal employment application is located on the SJSURF website on the [Forms page](#). **All candidates must submit their application materials to [foundation-jobs@sjsu.edu](mailto:foundation-jobs@sjsu.edu). Please add **DR FA** to the subject line of the email.**

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.

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## REASONABLE ACCOMODATION

The San José State University Research Foundation (SJSURF) 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](mailto: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.

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## ABOUT THE SJSU RESEARCH FOUNDATION

SJSURF employment is separate and distinct from San José State University or state of California employment. SJSURF employees are not employees of SJSU or of the state of California.

SJSURF is a non-profit auxiliary of San José 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.

**SJSURF 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.