San Jose State University Research Foundation

Position: Director, Finance and Accounting

**DEPARTMENT:** Finance & Accounting

**IMMEDIATE SUPERVISOR:** Executive Director

**POSTING DATE:** January 24, 2020

**CLOSING DATE:** Open Until Filled

**SALARY:** $153k to $163k Negotiable based on experience DOQ/E

**BENEFITS:** Excellent benefits package includes company subsidized CalPERS medical plan selections (3 PPO's and 7 HMO's); company paid dental and vision insurance for employees and eligible dependents; Life, AD&D, and LTD coverage; 13 paid holidays; a 403 (b) retirement plan with a 7% employer retirement contribution following 1 year of benefited employment with immediate vesting; accrual of up to 25 days of vacation per year; stand-alone sick leave hours accumulation; and a subsidized post-retirement medical insurance plan for eligible employees.

**EXEMPT STATUS:** Exempt, Full-Time

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**GENERAL NATURE OF POSITION:**

This position provides senior level leadership and operations management for activities in support of the Research Foundation’s $59 million in annual revenues and assets. The Director 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 4, and indirectly manages a staff of approximately 9, including Risk Management, AP/AR, and Cash Management/Treasury operations.

The Director also actively contributes to the strategic direction of the Research Foundation by collaborating with business unit Directors, the Executive Director as well as SJSU’s AVP of Research in developing and implementing financial technology systems, policies, programs and procedures for the organization.
ESSENTIAL DUTIES & RESPONSIBILITIES:

1. Leads, directs and oversees the Research Foundation’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 four employees. Primary signer of the checks.

2. Provides ongoing management and direction of Central Office budgets as well as the annual Research Foundation budgeting process. Manages department operating budget of approximately $1.5 million and the Research Foundation’s reserve budget. Reviews and manages monthly budget reports.

3. Ensures appropriate compliance with Uniform Guidance regulations, GAAP, CASB, 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 Board of Directors, Finance Committee, retirement plan committee and RORMT meetings.

5. Implements, modifies, and manages existing finance and accounting policies and procedures to increase efficiencies within the department. Leads and provides overall direction for workflow implementation efforts. Reviews and/or updates financial policies and procedures to ensure appropriate segregation of duties and compliance.

6. Ensures that excellent customer service is extended and maintained as to all customers and clients, internal and external.

7. Provides financial and administrative leadership, management and oversight for approximately $59 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. Is the company’s 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.


10. Prepares the Research Foundation’s fringe benefit proposal each year. Manages Indirect Cost proposal, including vacation pool implementation. Provides direction and management of investments in collaboration with investment firm.

11. 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.

12. Performs other duties, as assigned.

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INTERPERSONAL CONTACTS:

• Reports to the Executive Director of the Research Foundation.
• Regularly interacts with AVP of Research, Provost, College Deans, Department Chairs, faculty, other university personnel, and sponsor 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.
- 4 Direct reports – Financial Analyst, Accounts Payable Manager, Associate Director of Finance, and Risk Manager.

QUALIFICATIONS:

1) Education and Experience

   a) Bachelor’s degree in Finance and/or Accounting required. An advanced degree such as a Masters in Accounting or Finance, MBA or CPA certification is highly preferred.

   b) Must have advanced level knowledge in MS Office (Excel; Word; Power Point). Cognos report writing is strongly preferred.

   c) Must have a minimum of 10 years of progressive financial operations and management experience, preferably in a non-profit, externally funded contracts and grants environment.

   d) Must have five or more years of demonstrated hands-on experience in leading and managing multiple managers in a culturally-diverse and fast-paced environment.

   e) Experience working with non-profit governing boards is highly preferred.

   f) Related experience in financial management, regulatory compliance/legal matters, risk management, technology commercialization in a public service setting or a private foundation.

   g) Must have experience working with ERP systems. Experience with the design and implementation of and/or conversion of, accounting systems is highly desirable.

2) Knowledge, Skills, Abilities Required

   a) Demonstrated 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.

   b) Knowledge of current financial accounting and reporting requirements for higher education (GASB and FASB).

   c) Working knowledge of methodology and preparation of indirect cost proposals including Fringe Benefits pool through the Department of Health and Human Services (DHHS).

   d) Demonstrated hands on leadership and management skills.

   e) Highly effective analytical skills and negotiating skills is required.

   f) Must have demonstrated strong public speaking, oral and written communication skills.

3) Complexity of Duties

   a) Works with minimal direction on all assigned projects.

   b) Exercises independent judgment in the management and completion of a diverse set of concurrent tasks, including leading specific development efforts.

   c) Works on complex problems where analysis of data or solutions requires an evaluation of intangible, variance factors.
d) Exercises independent judgement in developing effective networks, resources, and methods for evaluating criteria for achieved results.

e) Prepares, edits, synthesizes, oversees, and/or approves all manner of financial, compliance, and other reports.

4) **Physical Requirements**
a) Frequent and ongoing use of a computer terminal to conduct a variety of the more advanced clerical functions and communications;

b) 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.

c) Strength, dexterity, and coordination and/or ability to use a computer keyboard and read a video display terminal on a regular basis.

d) Ability to listen to verbal requests from customers, clients, and vendors, and to respond appropriately.

e) Frequent need to reach for items above and below desk level, sometimes with assistance of a step-stool.

f) Standing and sitting for long periods of time is periodically required.

**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.

**BENEFITS:**
The comprehensive benefit package includes:
a) Ten company subsidized CalPERS health insurance plans to choose from (employee contributions differ according to plan and level of coverage).

b) Free dental and vision for both employee and eligible dependents.

c) Life, AD&D, LTD with supplemental coverage opportunities.

d) 13 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 hours accruals and separate sick hours accumulations. This position accrues up to 25 days of vacation on an annual basis.

g) Employee discounts, paid training and professional development 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.

**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. The formal employment application may be obtained from the Research Foundation through its website at [http://www.sjsu.edu/researchfoundation/open/index.html](http://www.sjsu.edu/researchfoundation/open/index.html)

Due to the COVID-19 health crisis, all candidates must submit their application materials via the foundation-job@sjsu.edu email address. Please be sure to include the HR job code of: CO DIRFIN on the formal employment application.
Reasonable Accommodation

The San José 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.