



## Position/Job Description

### ASSISTANT CHIEF FINANCIAL OFFICER (CFO)

#### APPLICATION PROCESS AND HIRING TIMELINE INFORMATION

To apply for this position you should submit a [KWU Employment Application Form](#)-, a cover letter, resume/curriculum vitae, and your salary requirements. Please email your application materials to [karen.tumlinson@kwu.edu](mailto:karen.tumlinson@kwu.edu) (preferred method) or mail the same to The Office of Human Resources, Campus Box 33, Kansas Wesleyan University, 100 E. Claffin, Salina, KS 67401-6196. In your cover letter please pay special attention to matching your actual qualifications to the required qualifications listed in this Job Description. If emailing, make sure you reference the position title on the subject line of your email.

The timeline for filling this job is:

- Applications will be taken until the job is filled.
- Interviews will begin as soon as November 17, 2017 and continue until the job is filled.
- The job starts as soon as possible.

We will NOT check personal references or present and past employers without first notifying you of our intent to do so. KWU is an Equal Opportunity Employer, and we will acknowledge receipt of your application as soon as we receive it.

#### ADMINISTRATIVE INFORMATION

**POSITION TITLE:** ASSISTANT CFO

**POSITION'S OPERATING GROUP:** Finance and Operations

**GROUP'S PURPOSE AND MAJOR RESPONSIBILITIES:** The purpose of the Finance and Operations group is to provide and manage the financial and supporting operational services of the university. Major responsibilities include: 1) recording all financial transactions in an accurate and timely manner, 2) producing the university's financial statements and reports in an accurate and timely manner, 3) providing financial budgeting, analysis, and compliance reports and services, 4) managing university assets, liability, and equity accounts, and 5) managing supporting services to include the Post Office, Bookstore, Information Technology, and Facilities.

**POSITION'S DEPARTMENT:** N/A

**DEPARTMENT'S PURPOSE AND MAJOR RESPONSIBILITIES:** N/A

**POSITION'S DIRECT SUPERVISOR:** VP of Finance and Operations/CFO (Karen Tumlinson)

**DATE POSITION LAST REVIEWED OR ANALYZED:** October 2017 REVISOR: Karen Tumlinson (VP-F/O)

**POSITION'S EMPLOYMENT STATUS:** Full-Time, Administrative, Exempt, At-Will

**POSITION'S SALARY OR SALARY RANGE AND BENEFITS:** Salary to be determined at hiring based on the person's qualifications and experience.

#### POSITION INFORMATION

**POSITION'S SUMMARY:** This position is responsible for overseeing all general ledger activity, overseeing codification of revenues and expenditures as well as report development for Student Financial Planning and Business Office.

**POSITION WORKS WITH:** The Financial/Operations group consists of 25-35 employees of which 2-5 employees report directly to this position. This position works with other university administrators, staff, outside regulatory agencies, financial advisors, and other similar university stakeholders.

**POSITION'S STAFF AUTHORITY:** Directly supervises 2-4 staff in accounting.

**POSITION'S BUDGET AUTHORITY:** Group Budget in excess of \$750,000.

**POSITION'S PHYSICAL WORKING CONDITIONS:** 90% office environment and 10% campus environment. Position requires standing, sitting, stooping, lifting, filing, keyboarding/typing, speaking, seeing, hearing, walking and other similar motions and activities.

**POSITION'S UNUSUAL HAZARDS OR WORKING CONDITIONS:** None

**POSITION'S EQUIPMENT/APPLICATIONS:** University Jenzabar information systems, PC and/or Mac, Microsoft suite, SQL.

**POSITION'S WORK SCHEDULE:** Monday through Friday 8 a.m. to 5 p.m. schedule with additional hours as required by university and group needs. A normal work will range between 40 and 50 hours.

**POSITION'S TRAVEL REQUIREMENTS:** Minimal; usually related to financial meetings, training, and personal development activities.

## POSITION DUTIES AND PERFORMANCE STANDARDS

### **POSITION'S ESSENTIAL DUTIES:**

1. **FINANCIAL REPORTING, AUDITING, AND COMPLIANCE (30%):** in coordination with the CFO, ensure the accurate and timely reporting of the overall financial transactions of the university within the requirements of GAAP and other financial regulatory bodies, in order to communicate an accurate and complete understanding of the university's past, present, and future financial condition to university decision-makers and interested outside agencies (lenders, federal regulators, etc.).
  1. Ensures the accurate and timely preparation and presentation of the university's financial statements, both for external reporting and for internal management.
  2. Audits and ensures university compliance with the regulations and requirements regarding federal and state financial assistance programs.
  3. Provides internal audits of accounts and processes, and provides external auditors with the assistance required for an accurate and successful audit of the university's financial records and processes.
2. **ASSET/LIABILITY/ACCOUNT MANAGEMENT (20%):** responsible for identifying, protecting, and maximizing the safety, accuracy, and productivity of each of the university's important financial accounts.
  1. Actively manage cash and cash reserves to ensure the university's ability to cover its financial obligations as they occur.
  2. Actively oversee accounts receivables in order to reduce late payments and bad debts.
  3. Actively oversee inventories.
  4. Ensure reconciliation of all balance sheet accounts on a monthly basis.
  5. Ensure university pays all vendors in a timely and accurate fashion.
3. **OFFICE AND STAFF SUPERVISION (20%):** responsible for identifying, hiring, and improving staff in order to achieve this operating group's goals and objectives within the group's budget.
  1. Directly supervises the Finance direct reports by assigning specific goals and objectives for each direct report, evaluating performance against those goals and objectives, and holding direct reports accountable for their performance.
  2. Assists the Finance and Operations group staff to create and execute personal development plans in order to improve and enhance each employee's ability to achieve and increase personal and university success.
4. **REPORT DEVELOPMENT AND DISSEMINATION (20%)**
  1. Use Jenzabar CX system from the front end and back end to generate reports, data manipulation, imports, and exports.
  2. Develop complex reports in Cognos and share them with Finance team.

### **POSITION'S OTHER DUTIES (10%):**

1. Conducts cost oversight for special projects.
2. Serves on appropriate university committees as assigned.
3. **PERFORMS OTHER APPROPRIATE AND REASONABLY REQUIRED DUTIES AS ASSIGNED BY THE POSITION'S SUPERVISOR.**

**POSITION'S PERFORMANCE MEASURES AND STANDARDS:** Specific performance measures and standards (goals) for each performance measure will be set in consultation with the position holder and their direct supervisor.

1. Goals for First Four Months:
  1. Review finance and operations processes and practices and recommend improvements to enhance group and university effectiveness and efficiency.
  2. Review and recommend appropriate next steps to improve functionality of LMS and CMS (Jenzabar).
2. Performance Reviews:
  1. Formal quarterly reviews of performance based on assigned strategic goals and objectives.
  2. Formal annual review and goal setting to review past performance and set coming strategic and tactical goals and objectives for the coming year.
  3. Satisfaction Survey of all serviced constituents to ensure positive and effective working relationships.

3. Begin Cognos training within first two months. Within six months of training, be able to modify Cognos reports to produce requested results. Begin advanced training with in first year.

## POSITION QUALIFICATIONS

### **EDUCATION:**

- MINIMUM REQUIRED: Bachelor's Degree in Business or Accounting
- PREFERRED: MBA with emphasis in accounting, or similar degree.

### **CERTIFICATIONS/LICENSES:**

- MINIMUM REQUIRED: None
- PREFERRED: CMA, or similar designation.

### **WORK EXPERIENCE:**

- MINIMUM REQUIRED: Five or more years in financial administration with at least two years supervision experience.
- PREFERRED: Preference given to those with experience in private education in a financial administrative role.

### **KNOWLEDGE, SKILLS, ABILITIES, and ATTITUDES – KSAA's:**

- MINIMUM REQUIRED
  - Demonstrable alignment with the mission and vision of KWU.
  - Displays a positive attitude and is professional in all situations.
  - Demonstrable professional level oral and written communication skills.
  - Demonstrable proficiency in Word and development of Excel workbooks.
  - Intermediate IT skills, including web conferencing.
  - Demonstrable ability to work well with others and in teams.
  - Demonstrable ability to prioritize duties and to execute detailed work.
  - Demonstrable ability to think creatively and to solve complicated financial problems.
  - Demonstrable ability to maintain confidentiality.
  - Demonstrable punctuality and reliability in attendance.
- PREFERRED
  - SQL background preferred.

## NOTICE OF SPECIAL POSITION OR EMPLOYMENT REQUIREMENTS

1. THIS POSITION DESCRIPTION IS NOT DESIGNED TO COVER OR CONTAIN A COMPREHENSIVE LIST OF ALL DUTIES AND RESULTS TO BE PERFORMED IN THIS POSITION. DUTIES AND PERFORMANCE STANDARDS MAY BE ADDED, SUBTRACTED, AND/OR CHANGED BY YOUR SUPERVISOR AT ANY TIME DUE TO CHANGES IN DEPARTMENT OR UNIVERSITY REQUIREMENTS.
2. Unless exempt due to an employment contract signed by the President of the University, all employees of Kansas Wesleyan are to be considered as an "at-will" employee.
3. All employees of Kansas Wesleyan University are considered to be "responsible employees" pertaining to Title IX regulations concerning both the prevention and reporting of sexual assault or harassment situations. As such, all employees must communicate with the Title IX Coordinator if they witness or hear about a sexual assault or harassment situation.
4. Kansas Wesleyan University is an equal opportunity employer and complies with EEOC and ADA employment requirements. It is and has been the policy of Kansas Wesleyan University to grant equal opportunity to all qualified persons without unlawful discrimination based on race, color, gender, age, national origin, ancestry, ethnicity, disability, sexual orientation, religion, or veteran status. In order to fulfill its mission as a United Methodist affiliated institution, preference in hiring shall be given to persons who can affirm the Institution's mission.
5. All "offers of employment" are subject to a criminal background check prior to employment.