



## Position Description Assistant CONTROLLER

### APPLICATION PROCESS AND HIRING TIMELINE INFORMATION

To apply for this position, you should submit:

1. [KWU Employment Application](#)
2. Cover letter,
3. Resume/curriculum vitae,
4. Three references,
5. Desired salary
6. Please email your application materials to [hr@kwu.edu](mailto:hr@kwu.edu).

The timeline for filling this position is:

- Applications will be taken until the position is filled.
- Interviews will begin when qualified applicants are identified and continue until a hiring decision is made.
- The position starts as soon as filled.

**KWU is an Equal Opportunity Employer and encourages diversity in employment.** We will check references of past employers and personal references. We will acknowledge receipt of your application as soon as we receive it.

### ADMINISTRATIVE INFORMATION

**POSITION TITLE:** Assistant Controller

**POSITION'S OPERATING GROUP:** Business Office

**GROUP'S PURPOSE AND MAJOR RESPONSIBILITIES:** The purpose of the Business Office 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:** Business Office

**DEPARTMENT'S PURPOSE AND MAJOR RESPONSIBILITIES:** To provide accurate and timely recording of all financial transactions related to the university and the creation of accurate and timely financial reports (Income Statement, Balance Sheet, Cash Flow Statement, etc.) which provide senior management the information necessary for effective and efficient financial analysis and decision-making.

**POSITION'S DIRECT SUPERVISOR:** VP of Finance and CFO; AVP of Finance and Controller

**DATE POSITION LAST REVIEWED OR ANALYZED:** September 2024, REVISED BY: VP of Finance and CO.

**POSITION'S EMPLOYMENT STATUS:** Full-Time, Staff, 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: 1) planning, coordinating, and evaluating the goals and activities of the accounting department in alignment with the goals and activities of Business Office; 2) leading, supporting and motivating the position's direct reports; 3) ensuring the accurate and timely recording of all financial transactions related to the university; 4) ensuring the production of accurate and timely financial reports which can be used by senior and operating managers to perform effective and efficient analysis and decision-making; and 5) achieving the department's strategic and tactical goals and objectives, allowing the group and university to do the same.

**POSITION WORKS WITH:** The Business Office consists of 4-5 employees, and is part of the Financial/Operations group which consists of 20-30 employees. This position works closely with direct reports as well as the VP of Finance and CFO. In addition, this position works with other university administrators, staff, outside regulatory agencies, members of the Foundation Board, trustees, financial advisors, and other similar university stakeholders.

**POSITION'S STAFF AUTHORITY:** Directly supervises the following positions or direct reports: Accounts Receivable

**POSITION'S BUDGET AUTHORITY:** None

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

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

**POSITION'S EQUIPMENT:** University phone system, University computer system, Jenzabar/CX information system, desk top computer.

**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 45 and 55 hours.

**POSITION'S TRAVEL REQUIREMENTS:** Minimal and usually related to off-campus financial meetings and personal development activities.

## POSITION DUTIES AND PERFORMANCE STANDARDS

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

1. TRANSACTION RECORDING (35%): responsible for ensuring the accurate and timely collection and recording of all financial transactions of the university within the requirements of GAAP and other financial regulatory bodies
  1. Assists in posting and ensures the proper classification and recording of all university financial transactions (account numbers, classification numbers, and amounts).
  2. Ensures reconciliation are prepared on a timely basis on all accounts.
  3. Prepares year-end and other necessary general ledger transactions to close and balance the university's financial records.
  4. Ensures proper documentation of all transactions, and the retention of that documentation.
2. FINANCIAL REPORTING AND COMPLIANCE (25%): responsible for reporting 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 current financial condition.
  1. Ensures the accurate and timely preparation and presentation of the university's financial statements, both for external reporting and for internal management.
  2. Provides past financial statements and information necessary for effective analysis.
  3. Ensures the retention of financial reports for future reference and use.
3. OFFICE AND STAFF SUPERVISION (10%): responsible for identifying, hiring, and improving staff in order to effectively and efficiently achieve the Accounting Department's goals and objectives within the department's budget.
  1. Assists the Accounting Department 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. FINANCIAL AUDITING AND COMPLIANCE (15%): responsible for reporting the overall financial transactions of the university in compliance with Generally Accepted Accounting Principles (GAAP) and other financial regulatory requirements, 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. Provides internal auditing to ensure accurate posting of transactions.
  2. Assists and provides external auditors with the information required for an accurate and successful audit of the university's financial records and processes.
5. ACCOUNTS MANAGEMENT (5%): responsible for managing, overseeing, and/or assisting with the effective and efficient utilization of university balance sheet accounts.
  1. Assist VP of Finance and CFO to manage cash and cash reserves to ensure the university's ability to cover its financial obligations as they occur.
  2. Actively manage accounts receivables in order to reduce late payments and bad debts.
  3. Actively oversee inventories, as well as purchasing contracts and leases, in order to increase purchasing value and minimize overstocks and obsolescence.

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

1. Assists the Controller to provide the Finance and Operations Committee of the Board of Trustee with the information they need to complete their work and to make effective and efficient recommendations to the Board as a whole.
2. Assists the university Foundation with information, analysis, and recommendations as needed.

**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 First Four Months
  1. Accurate and timely preparation of monthly financial statements.
  2. Ensure consistent and timely billing and collecting student accounts.
  3. Identify and recommend improvements in group and department practices and processes to increase effectiveness and efficiency.
2. Performance Reviews
  1. Informal weekly reviews of priorities and performance based on assigned tactical 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.

\*\*Please note position description subject to change\*\*

## POSITION QUALIFICATIONS

**EDUCATION:**

- MINIMUM REQUIRED: Bachelor's Degree in Accounting
- PREFERRED: Master's Degree in Accounting,

**CERTIFICATIONS/LICENSES:**

- MINIMUM REQUIRED: None
- PREFERRED: CPP

**WORK EXPERIENCE:**

- MINIMUM REQUIRED: Five or more year in accounting with at least two years supervision experience.
- PREFERRED: Preference given to those with experience in private education in a financial accounting, and with at least two years in not-for-profit accounting.

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

- MINIMUM REQUIRED
  - Demonstrable alignment with the mission and vision of KWU.
  - Demonstrable professional level oral and written communication skills.
  - Demonstrable proficiency in using Word and Excel.
  - Demonstrable ability to work well with others and in teams.
  - Demonstrable ability to prioritize duties and to execute detailed work.
  - Demonstrable ability to maintain confidentiality.
  - Demonstrable punctuality and reliability in attendance.
- PREFERRED
  - None

#### NOTICE OF SPECIAL POSITION OR EMPLOYMENT REQUIREMENTS

1. THIS JOB DESCRIPTION IS NOT DESIGNED TO COVER OR CONTAIN A COMPREHENSIVE LIST OF ALL DUTIES AND RESULTS TO BE PERFORMED IN THIS JOB. 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 Kansas Wesleyan 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 Christian 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.

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