



Position Profile

Director of Financial Planning and Analysis

August 2019

(Note: This job may qualify for virtual office consideration)

In partnership with Summit Search Solutions, Inc.

ABOUT SOUTHERN CALIFORNIA UNIVERSITY OF HEALTH SCIENCES

Southern California University of Health Sciences (SCU) is a regionally accredited, nonprofit institution specializing in health care education. SCU is dedicated to its core values of grit, transparency, a sense of humor, and shared respect for a diversity of ideas, beliefs, and cultures.

The Southern California University of Health Sciences was founded in 1911 as the Los Angeles School of Chiropractic. SCU has added multiple programs over the years and is today a comprehensive health sciences university offering certificate, baccalaureate, and graduate-level education to students interested in pursuing a career in the health professions. SCU is a leader in educating students to be competent and caring integrative healthcare practitioners. SCU has a history of providing the highest levels of patient care and has gained a reputation for excellence in an evidence-informed curriculum. For more information on SCU: <https://www.scuhs.edu/>

SCU's mission is to educate students as competent, caring, and successful integrative healthcare practitioners. Faculty, staff, and students enjoy a collaborative and engaged community that includes an active student association, staff senate, and faculty senate.

The University is proud of the SCU Health Center, a unique educational health and wellness facility residing in the heart of Whittier, California. The Center has been educating practitioners for 100 years. Skilled and qualified students provide care under the close guidance of expert, licensed SCU Health System practitioners. The SCU Health Center provides chiropractic, acupuncture, Ayurveda, and massage therapy services to address a variety of ailments and medical conditions. Each patient, based on their needs and condition, receives a customized plan that is right for their health and lifestyle.

The University is committed to providing excellence in academics, service, scholarship, and leadership through its four colleges:

- **Los Angeles College of Chiropractic**
 - Doctor of Chiropractic
 - Sports Medicine Residency
 - Diagnostic Imaging Residency
 - Veteran Affairs Residency
- **College of Eastern Medicine**
 - Doctor of Acupuncture & Chinese Medicine
 - Master of Acupuncture & Oriental Medicine
- **College of Science and Integrated Health**
 - Master of Science: Physician Assistant Program
- **School of Professional Studies**
 - Accelerated Science Courses
 - BS in Biological Sciences
 - Ayurveda Certificate Program
 - Clinical Internship for Ayurveda Practitioners
 - Massage Therapy Certificate Program

QUICK FACTS

13:1 Student to Faculty Ratio
6 Continents represented by SCU Alumni
30+ Student Groups and Associations
20 Average Class Size
35,000 Annual patient visits to the SCU Health System allowing students real world experience
12 Affiliated Health Centers
25 Acre Campus

[The Refreshed Institutional Plan to 2023](#) provides a sustainable plan for the success and growth of Southern California University of Health Sciences.



THE OPPORTUNITY

Director of Financial Planning and Analysis

The Director of Financial Planning and Analysis is responsible for preparing, analyzing, and maintaining financial reports and disseminates reporting to appropriate campus constituents. Responsibilities include partnering with functional business area management and analysts in consolidating, modeling, and analyzing financial related data to measure and report on the performance of the business; using advanced modeling techniques generating and maintaining the financial forecast; working closely with other members of the Accounting team to provide accounting, budget management, reporting, and training to the campus community; maintaining development, maintenance, and reporting of the University's multi-year forecasting tools in alignment with the strategic direction of the institution. The Director has an integral role in working with the Assistant Vice President of Accounting and the Budget Review Committee to ensure a fluid and transparent budget process. The position will be given consideration for working from a virtual home office with some travel required.

Primary Responsibilities:

- Prepares monthly financial reports reflecting monthly and year-to-date financial activity, as well as projected financial activity through yearend, and including drivers of financial activity such as enrollment, patient visits, etc., ensures that reporting is compared to budget and grouped by business segment and in total.
- Prepares and monitors the University's multi-year forecast model.
- Develops and maintains campus-wide communication and training to enable end-users to view, track, and take ownership of their respective areas of budget responsibility.
- Assists Deans, Directors, and other University leaders in interpreting financial and budget reports, analyzing data, and planning budgets.
- Creates dashboards, graphs, and other reporting tools to communicate information to campus constituents.
- Maintains allocation methods to distribute shared costs to appropriate departments (for example allocating administrative overhead costs).
- Develops predictive models to analyze financial consequences of policy or program changes to provide management with relevant insight and policy options and supports strategic decision-making.
- Refines modeling assumptions and employs methodologies that result in improved projection accuracy and validity.
- Monitors enrollment and tuition earnings against projections and provides variance reporting.
- Prepares analyses of labor costs and utilization.

- Analyzes key business metrics and ratios, including Composite Financial Index (CFI) and components, Department of Education financial responsibility composite score, as well as retention and graduation rates, and other metrics as needed.
- Accurately analyzes complex financial and accounting data and effectively communicates it to a wide variety of executives, faculty, and other constituents in lay terms.
- Prepares analysis and financial/budget reporting of budget vs. actual reports as well as historical analyses for initiatives, cost centers, and segments to assist in decision making and enhance University performance.
- Proactively identifies and presents opportunities to enhance financial and business effectiveness.
- Actively seeks new tools and ideas to help management create business plans on behalf of the University.
- Plays an active role in formulating budget policies, controls, and work flow processes, and communicating same within the campus community.
- Serves as liaison with Human Resources for salary and benefits budget matters including position control, data development, analytics, and maintenance.
- Tracks extraordinary budget and cash flow needs and assists senior management with the identification of sources and uses of revenue and cash flows.
- Actively supports a diverse and inclusive workforce.
- Performs other related duties as assigned by management.

Qualifications:

- Bachelor's degree from four-year college or university with three to five years of related experience or more.
- Computer skills required: Microsoft Office, with advanced skillset in Excel and PowerPoint. Knowledge of database applications preferred.
- Ability to read, analyze, and interpret common financial reports and legal documents. Ability to respond to common inquiries or complaints from members of the campus community. Ability to effectively present information to top management, public groups, and/or boards of directors.
- Experience in the higher education sector preferred.

Competencies:

- **Attendance/Punctuality** - Is consistently at work and on time; ensures work responsibilities are covered when absent; arrives at meetings and appointments on time.
- **Analytical** - Synthesizes complex or diverse information; collects and researches data; uses intuition and experience to complement data; designs workflows and procedures.
- **Design** - Generates creative solutions; translates concepts and information into images; uses feedback to modify designs; demonstrates attention to detail.
- **Problem Solving** - Identifies and resolves problems in a timely manner; gathers and analyzes information skillfully; develops alternative solutions; works well in group problem-solving situations.
- **Project Management** - Develops project plans; coordinates projects; communicates changes and progress; completes projects on time and budget.
- **Technical Skills** - Assesses own strengths and weaknesses; pursues training and development opportunities; strives to continuously build knowledge and skills; shares expertise with others.
- **Customer Service** - Manages difficult or emotional customer situations; responds promptly to customer needs; solicits customer feedback to improve service; responds to requests for service and assistance; meets commitments.
- **External Working Relationships** – Develops and maintains courteous and effective working relationships with clients, vendors and/or any other representatives of external organizations.

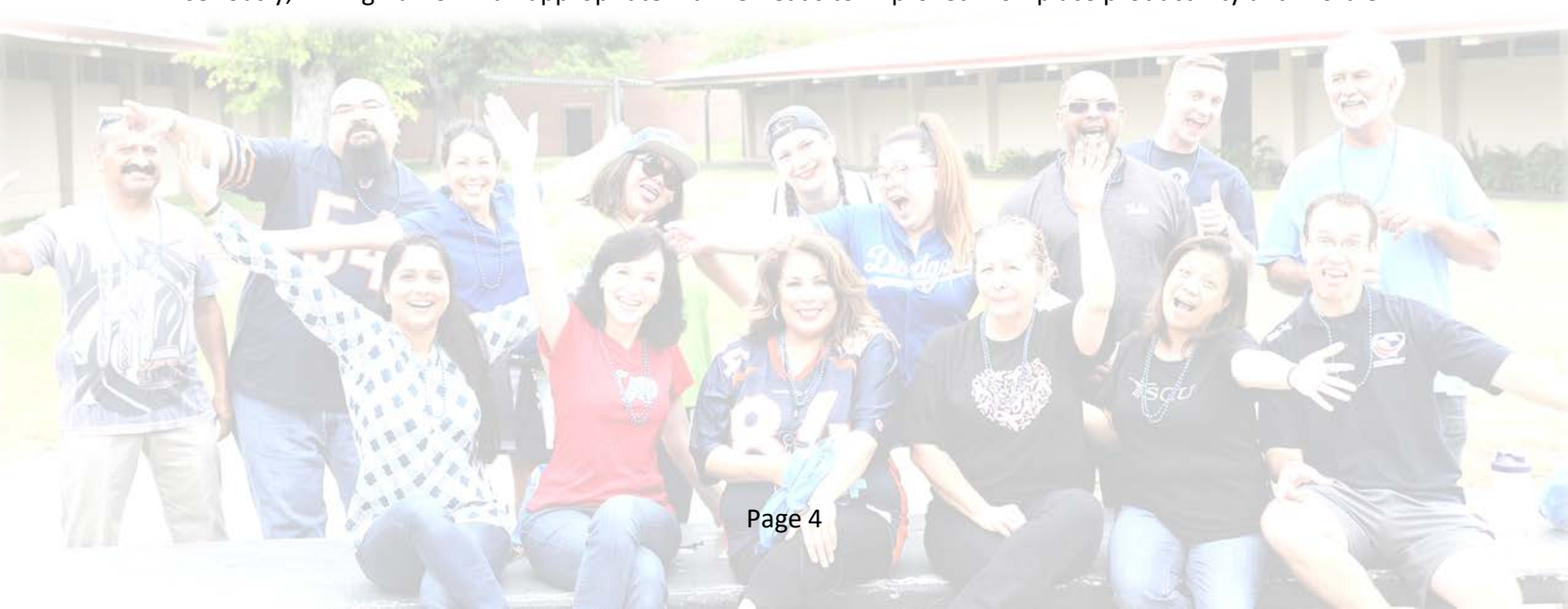
- **Change Management** - Develops workable implementation plans; communicates changes effectively; builds commitment and overcomes resistance; prepares and supports those affected by change; monitors transition and evaluates results.
- **Business Acumen** - Demonstrates knowledge of market and competition; aligns work with strategic goals; analyzes market and competition and adapts strategy to changing conditions.
- **Cost Consciousness** - Works within approved budget; develops and implements cost-saving measures.
- **Business Necessity** – The needs of the employer may be dependent on responding to and anticipating rapidly changing external and internal demands in all aspects of how business is conducted. This may include, but is not limited to, organization structure, finances, goals, personnel, work processes, technology, and customer demands. Therefore, it may become necessary to make modifications to how business is conducted and work is accomplished, with minimal or no advance notice to employees. Accordingly, the employee must be capable of adapting, with minimal or no advance notice, to changes in how business is conducted and work is accomplished, with no diminishment in work performance.
- **Safety and Security** - All employees are responsible for observing safety and security procedures as applicable and reporting potentially unsafe conditions to management.

Expectations of SCU Employees:

The SCU President’s Cabinet has identified a set of values and attributes that are bare minimums for employment, those that are core to who we are as a University, and values to which we aspire. This is in harmony with principles found in *The Advantage*, by Patrick Lencioni.

SCU Core Values:

- **Transparency:** Transparency implies openness, clear communication, respect, and accountability. Transparency is operating in such a way that it is easy for others to see what actions are performed. SCU believes that transparency leads to trust, improved problem solving, stronger unified teams, and enhanced productivity.
- **Grit:** Grit is passion and perseverance toward long-term goals. A positive, non-cognitive trait based on an individual’s passion for a particular long-term goal coupled with a powerful motivation to achieve their respective objective. This perseverance of effort promotes the overcoming of obstacles or challenges that lie within a gritty individual’s path to accomplishment. At SCU, grit is “Sprinting the Marathon” - engaging in to be successful and reach long-term sustainability in the ever-changing healthcare and higher education environment.
See: http://www.ted.com/talks/angela_lee_duckworth_the_key_to_success_grit.html
- **Sense of Humor:** Having a sense of humor is about having a sense of perspective and using the ability to find the humor in situations to manage stress and creatively problem solve. At SCU, adding relevant and safe humor is about celebrating work, not trivializing it. By occasionally taking one another lightly, while still taking their jobs seriously, mixing humor in an appropriate manner leads to improved workplace productivity and morale.





PROCEDURE FOR CANDIDACY

Confidential review of applications will begin immediately and are welcomed until the position is filled. Click here to apply and be sure to include your resume and cover letter: <https://theapplicantmanager.com/jobs?pos=su177>

For nominations or further information:

Kristen Farha

Senior Consultant

Summit Search Solutions, Inc.

Direct: (316) 650-0069

kfarha@summitsearchsolutions.com

Carrie Coward

President

Summit Search Solutions, Inc.

Direct : (828) 669-3850

ccoward@summitsearchsolutions.com

Southern California University of Health Sciences is an equal opportunity employer. Members of underrepresented groups are encouraged to apply.



Summit Search Solutions, Inc. is a boutique executive search firm dedicated to serving education and nonprofit communities nationwide. Based in Asheville, NC, Summit has a team of experienced recruiting consultants in strategic locations across the country including California, Kansas, New York, North Carolina, and Oregon.





Image by David Mark from Pixabay

WHITTIER and SOUTHERN CALIFORNIA

Whittier is a unique combination of community identity, spirit, and cooperation that have helped make it one of the most attractive and desirable residential and business locations in Southern California. Located in Los Angeles County, about 12 miles southeast of the City of Los Angeles, it boasts beautiful year-round weather with temperatures rarely reaching above 90 degrees or below 50 degrees.

Living in Whittier offers residents a small-town feel but with the benefits of a large metropolitan area with access to a vast array of cultural and recreational opportunities. In addition to all the attractions offered by the private sector, the County has several world-class facilities including the Music Center, Hollywood Bowl, Museum of Art, the Natural History Museum, the Ford Theatre, and Marina del Rey. The County manages 87 regional and local parks, 344 miles of horse and hiking trails, 19 golf courses, 31 public swimming pools, and 25 miles of beaches.

And there is no end to what Southern California (SoCal) offers in the way of world-renowned restaurants, gallery exhibits, theater, and just about every outdoor activity you can think of.

Southern Californians lead an outdoor lifestyle where family dinners can be served on the patio, an office worker can go for an outdoor run during his lunch hour and weekends can be spent bike riding, hiking, or taking the dogs for a long walk, followed by a stroll through the neighborhood farmers market. This is the life in SoCal year-round.

To learn more about *Whittier* and *Southern California*, visit:

Explore Whittier California: <https://www.explorewhittier.com/>

Whittier Chamber of Commerce: <https://www.whittierchamber.com/>

LA County: <https://www.lacounty.gov/>

Los Angeles Times Arts & Culture: https://www.latimes.com/entertainment/arts/?_lb=1

