



Position Profile

Director of Financial Planning and Analysis

January 2022

(Note: This job qualifies for remote status)

In partnership with Summit Search Solutions, Inc.

ABOUT THE INSTITUTION

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 integrative health, evidence-based practice, health equity, and inclusivity.

The Southern California University of Health Sciences (SCU) 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 has a history of providing the highest levels of patient care and has gained a reputation for excellence in an evidence-informed curriculum. The University holds institutional accreditation with the Western Association of Schools and Colleges (WASC) as well as several programmatic accreditations. For more information: <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. SCU has been educating practitioners for over 100 years.

The University is proud of the SCU Health Center, a unique educational health and wellness facility residing in the heart of Whittier, California. Skilled and qualified students provide care under the close guidance of an expert, licensed SCU Health System practitioners. The SCU Health Center provides chiropractic, acupuncture, Ayurveda, and urgent care 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 diverse program portfolio:

- Doctor of Chiropractic
- Doctor of Occupational Therapy (in development)
- Doctor of Physical Therapy (in development)
- Doctor of Acupuncture & Chinese Medicine
- Master of Acupuncture & Oriental Medicine
- Master of Science in Human Genetics and Genomics
- Master of Science in Medical Science
- Master of Science: Physician Assistant Program
- Bachelor of Science in Health Sciences
- Accelerated Science Courses
- Ayurveda Certificate Program
- Clinical Internship for Ayurveda Practitioners
- Sports Medicine Residency
- Veteran Affairs Residency

QUICK FACTS

Serving over 1,200 students
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 ensuring the preparation and analysis, and maintenance of financial reports and dissemination of 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 university business segments, especially return on investment (ROI); supporting the program launch process (PLP) team in evaluating new programs; using advanced modeling techniques generating and maintaining overall 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. This position leads the annual planning and budgeting process in a fluid and transparent manner, reporting ROI for new initiatives. *NOTE: This position has the option of being remote.*

Duties and Responsibilities – Your Mission:

- Oversee and/or prepare 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.
- Prepare and/or oversee preparation and monitoring of the University's multi-year forecast model.
- Develop and maintain campus-wide communication and training program to enable end-users to view, track and take ownership of their respective areas of budget responsibility.
- Assist Deans, Directors, and other University leaders in interpreting financial and budget reports, analyzing data, and planning budgets.
- Create dashboards, graphs, and other reporting tools to communicate information to campus constituents.
- Maintain allocation methods to distribute shared costs to appropriate departments.
- Create and maintain methods to allocate administrative overhead costs to appropriate departments.
- Develop 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.
- Refine modeling assumptions and employ methodologies that result in improved projection accuracy and validity.
- Monitor enrollment and tuition earnings against projections and provide variance reporting.
- Prepare analyses of labor costs and utilization.
- Analyze key business metrics and ratios, including Composite Financial Index (CFI) and components, ED financial responsibility composite score, as well as retention and graduation rates, and other metrics as needed.
- Accurately analyze complex financial and accounting data and effectively communicates it to a wide variety of executives, faculty, and other constituents in lay terms.
- Ensure 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 identify and present opportunities to enhance financial and business effectiveness.
- Actively seek new tools and ideas to help management better understand and plan business.
- Play an active role in formulating budget policies, controls, and work flow processes, and communicating same with the campus community.
- Serve as liaison with Human Resources for salary and benefits budget matters including position control, data development, analytics, and maintenance.
- Provide operating and capital budget assistance to the Campus Community.
- Track extraordinary budget and cash flow needs and assist senior management with the identification of sources and uses of revenue and cash flows.
- Supervise and manage staff including staffing recommendations, hiring, termination and discipline, setting performance standards and evaluations, and staff development and training.
- Administer the Prophix software with support for the vendor.
- Actively support a diverse and inclusive workforce.

Qualifications, Skills, and Abilities:

- Bachelor's Degree (BA) from four-year college or university, or three to five years of related experience and/or training, or equivalent combination of education and experience.
- Computer skills required: Microsoft Office, with advanced skillset in Excel and PowerPoint. Knowledge of database applications is a plus. Experience with Prophix corporate performance software is a plus.
- 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.

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 work flows 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.

WHY CONSIDER THE OPPORTUNITY

- If you want to set a strategy, work with amazing senior-level leaders, make a significant impact, enjoy every day, and work in an environment void of traditional university politics - welcome!
- A university that is full of diverse, smart, passionate people who are committed to challenging convention and embracing collaboration.
- An incredible culture that drives everything they do.
- A welcoming team that embraces differences and has fun together.
- A chance to make a difference in a growing university with a focus on developing whole-person health care degrees.
- The ability to work in an environment that is a combination of work-from-home and on-campus. On-campus work will be dependent upon need and planned activity and is estimated at 2-4 times a year.
- A competitive salary and fantastic benefits, and the ability to make an impact.



PROCEDURE FOR CANDIDACY

Confidential review of applications will begin immediately and are welcomed until the position is filled but preference will be given to applications received by **February 16, 2022**. Please submit your resume and letter of interest. To apply online go to <https://theapplicantmanager.com/jobs?pos=su283>

For nominations or further information:

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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 the education and nonprofit sectors nationwide. Based in Asheville, NC, Summit has a team of experienced recruiting consultants in strategic locations across the country including California, Colorado, Kansas, Maryland, New York, and North Carolina.



Image by David Mark from Pixabay

WHITTIER and SOUTHERN CALIFORNIA

Whittier has 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:

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

