



POSITION PROFILE

Director of Financial Planning and Analysis Southern CA University of Health Sciences

(Remote & Hybrid Options)

June 2024

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 healthcare education. SCU is dedicated to its core values of integrative whole health, evidence-based practice, health equity, and inclusivity.

The mission of Southern California University of Health Sciences (SCU) is to educate students as competent, caring, and successful healthcare practitioners and professionals. An SCU education equips students with the necessary skills and knowledge for their chosen profession while also providing a deep appreciation for integrative, whole-person health. SCU is one of the only universities in the world to combine western, medical, complementary and integrative, and traditional eastern approaches to healthcare.

SCU's enrollment increased 79% in four years. During that same period, the percentage of students from underrepresented minorities in health-related sciences increased 36% and now represents 44% of the student population. The University is at an exciting inflection point as it intentionally positions itself to become one of the leading integrative health institutions in the nation. Plans to expand program offerings and to enhance interprofessional education opportunities for students are deliberate and strategic as SCU trains students to meet the urgent need to work across disciplines and professions and navigate a variety of philosophies, practices, and treatment options. The University holds institutional accreditation with the WASC Senior College and University Commission (WSCUC) as well as several programmatic accreditations. [Click here](#) to learn more about SCU.

The University is proud of the SCU Health Center, a unique educational health and wellness facility residing in the heart of Whittier, California. SCU Health faculty work directly with clinical students, helping them treat each person as a whole – considering their biology, psychology, sociology, and environment to achieve better health.

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
- Doctor of Whole Health Leadership (starts fall 2024)
- Doctor of Physical Therapy (in development)
- Doctor of Medical Science (starts fall 2024)
- Doctor of Acupuncture & Chinese Herbal Medicine
- Master of Science: Physician Assistant Program
- Master of Acupuncture & Chinese Herbal Medicine
- Master of Science in Human Genetics and Genomics
- Master of Science in Medical Science
- Graduate Certificate in Human Genetics and Genomics
- Master of Science in Genetic Counseling (in development)
- Post-Baccalaureate Health Education Certificate
- Bachelor of Science in Health Sciences
- Ayurveda Wellness Educator Certificate
- Ayurveda Practitioner Certificate
- Accelerated Science Courses serving 3,000+ course takers
- Additional programs planned in Physical Therapy in Arizona, Occupational Therapy in Arizona, and more.

QUICK FACTS

- ✓ 1,300+ Students
- ✓ 14:1 Student to Faculty Ratio
- ✓ 20+ Student Groups
- ✓ 96% Retention Rate
- ✓ 45,000 Annual patient visits to the SCU Health System
- ✓ 9 Affiliated Health Centers and hundreds of affiliated clinical sites
- ✓ 25 Acre Campus
- ✓ \$1M in Institutional Scholarships
- ✓ Accelerated Sciences Division serving 3,000+ course takers annually



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 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.

Remote Opportunity: This position will require building strong relationships across the campus. Candidates for this position will have the option to work on campus, hybrid, or in a fully remote capacity. Travel to campus on occasion is expected to build relationships and attend key events and meetings. Travel costs will be budgeted for and covered by the University.

Duties and Responsibilities – Your Mission:

- Support the program launch process (PLP) team in evaluating new programs, including creating financial proformas for new programs and evaluating the performance of programs compared to their pre-launch proformas.
- 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 support 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 communicate 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 operations of the business.
- Play an active role in formulating budget policies, controls, and workflow processes, and communicating 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 from the vendor.
- Actively support a diverse and inclusive workforce.

Required Qualifications:

- 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 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.

WHY CONSIDER THE OPPORTUNITY

- **Mission & Leadership.** This role is still relatively new, having been created in 2019, so there is an opportunity here to make your mark on the department, and impact the institution as a whole.
- **Growing organization.** SCU has doubled its revenue in the last five years through a successful strategy of growth through adding new programs.
- **Location flexibility.** With the flexibility to choose whether to work remotely, hybrid, or on-site, this position lends itself to a unique blend of educating with a mission and maintaining a high quality of work-life.
- **Culture.** The University has a collaborative, supportive and collegial environment. An Honor Roll recipient of the *Chronicle of Higher Education's Best Places to Work*, SCU has built a community of shared respect and welcomes a diversity of ideas, beliefs, and cultures – creating the cornerstone of an engaging and thriving academic culture.
- **Generous time off.** Exceptional vacation and paid time off including national holidays, the day after Thanksgiving, Christmas Eve, New Year's Eve, 3 floating holidays, 2 paid community service days, 96 hours of sick leave, and 4 weeks of paid vacation time.
- **Benefits.** Health care plans are paid 100% for employees. Options to enroll family members are available at a reasonable cost.





PROCEDURE FOR CANDIDACY

Confidential review of applications will begin immediately and continue until the position is filled; **parties who apply by July 19 2024, will be given first consideration.** Please submit a PDF version of your resume and cover letter outlining your interest and suitability for this position.

To apply online go to <https://theapplicantmanager.com/jobs?pos=su414>

For more information please contact:

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Salary Range: The broad range is \$130,000-\$160,000. This compensation is open to negotiation based on market data as well as individual's depth of knowledge and leadership experience, particularly in strategic financial planning and analysis within a higher education environment.

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, Kansas, Maryland, New York, and North Carolina.



Image by David Mark from Pixabay

WHITTIER and SOUTHERN CALIFORNIA

Although the position can be remote or hybrid, this location page is included to educate potential candidates about Whittier, CA given that the University is located there and occasional visits to the University will be required.

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 farmer's 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