

Class Code:0627
Position #: .(PSA) (E).....
Developed by:.....MN
Reviewed by:.....LK, SB
Approved by:.....LK
Date:... 04/01; 09/06; 12/07; 01/13

UNIVERSITY OF RHODE ISLAND

Position Description

TITLE: Assistant Director, Alumni/Finance

DIVISION: Alumni Relations

REPORTS TO: Executive Director Alumni Relations, Secretary of Alumni Association

GRADE: 13

SUPERVISES: Alumni Association Assistant Business Managers & Clerical support staff

BASIC FUNCTION:

Supervise, coordinate, advise, administer and control budgets and expenditures for the State and for the URI Alumni Association, which is a 501(c) 3 not-for-profit organization. Analyze trends, develop statistical models and formulate projections for various budget components. Provide analytical counsel and support for special projects to Senior Management. Responsible for all financial and accounting functions of the Alumni Association related to the State and private funding sources. Coordinate business procedures and accounting policies, and oversee their implementation by all departments that use alumni funds. Maintain financial and fiscal integrity. Interface with the Alumni Association Executive Board, the Alumni Association Audit Committee, and the Alumni Association Finance Committee, and assist in setting and implementing policies in accordance with the generally accepted accounting policies. Coordinate and interact with the Director of Finance at the URI Foundation on various issues.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Responsible for the compilation, analysis and presentation of statistical and financial reports to the Executive Director of Alumni Relations, Alumni Association Executive Board, Alumni Association Finance Committee, Audit Committee and departments using Alumni Association funds.

Responsible for the development, documentation, coordination, supervision and maintenance of the internal accounting and audit control systems.

Monitor and supervise all financial and accounting functions for all departments and clubs using Alumni Association funds. Analyze State and Alumni Association accounts for accuracy and cost control.

Coordinate budget requests from departments that use Alumni Association funds and assist Executive Director of Alumni Relations, Alumni Association Finance and Audit Committees, and the President of the URI Foundation with determination and preparation of budgets.

Compile, maintain, review and revise annual reports for Senior Management.

Supervise, maintain and control Alumni Association accounting system. Verify and review data entered into the accounting system. Review accounting system needs, and recommend changes to improve reporting needs.

Coordinate and review banking fees and credit card usage; responsible for supervising cash disbursements, payroll and recording of cash; maintain savings, checking, sweep and investment accounts; coordinate the transfer of stocks donated to the Alumni Association.

Maintain and manage the Alumni Relations Human Resource Employee Handbook.

Manage the fringe benefits of Alumni Association employees: Medical and Dental Insurance, Retirement 403(B), Flex Spending Plan, Life Insurance Plan, vacations, Leaves of Absence.

Be responsible for and manage the vehicle leasing and insurance program for the Alumni Association.

Coordinate the annual audit and maintain contact with external auditors; prepare all account analyses and schedules needed by the auditors.

Maintain a high level of understanding of current development in the assigned areas of responsibility and anticipate future needs; maintain a high level of understanding of financial, accounting and compliance policies and practices as they relate to budget, revenue, expense and non—budgeted accounting activity.

OTHER DUTIES AND RESPONSIBILITIES:

Act as a liaison with the Audit and Finance Committees. Develop agendas with the Executive Director, attend meetings and take minutes.

Supervise and train support staff in collection of accounts receivable, cash deposits, credit card deposits, accounts payable, inventory control, and processing payroll for State and Alumni Association employees.

Provide feedback to Alumni Relations programming staff on periodic financial results of events put on by the Alumni Association staff.

Interact with the URI Enrollment Services Office on scholarship issues.

Represent Alumni Relations office in business-related activities within the University and, as appropriate, with outside agencies.

Perform additional duties as required.

LICENSES, TOOLS AND EQUIPMENT:

Personal computers, printers; knowledge of various software which may include Microsoft Excel, Microsoft Word, payroll processing, SAGE and PeopleSoft.

ENVIRONMENTAL CONDITIONS:

This position is not substantially exposed to adverse environmental conditions.

QUALIFICATIONS:

Required: Bachelor's degree in business administration, with a concentration in accounting or finance; minimum of five years of progressively professional-level experience in financial reporting and financial analysis; demonstrated technical accounting proficiency in the preparation and presentation of comprehensive financial statements; demonstrated significant progressive experience in financial analysis and management reporting; demonstrated understanding of, and experience in, applying accounting standards (FASB/GASB/GAAP); demonstrated experience in the administration of a complex budget and investments; demonstrated high computer efficiency and strong information management skills; demonstrated ability to organize details accurately and to effectively plan, communicate, and oversee work on a variety of fiscal projects; demonstrated strong analytical skills; demonstrated ability to organize large amounts of data, undertake new initiatives, and work in an environment with complex policies and procedures; demonstrated familiarity with federal and state financial and personnel regulations and guidelines; demonstrated knowledge or experience with not-for-profits; demonstrated excellent supervisory experience in a business office environment, with demonstrated ability to effectively organize and coordinate support staff; demonstrated strong interpersonal skills and ability to work with a diverse population; demonstrated strong oral and writing skills; demonstrated ability to organize and coordinate complex management tasks in a fast-paced deadline-driven environment; ability to communicate University and Alumni Association policies and procedures to departments using Alumni Association funds; demonstrated experience in organizing meetings; ability to prepare and present detailed information concerning the financial status of the Alumni Association to the Executive Director, President of the URI Foundation, Alumni Association Executive Board, Alumni Association Finance and Audit Committee;

Preferred: CPA and/or MBA; demonstrated working knowledge of accounting and information management systems, and of Microsoft Office Suite, SAGE, PeopleSoft, and payroll processing software.

ALL REQUIREMENTS ARE SUBJECT TO POSSIBLE MODIFICATION TO REASONABLY ACCOMMODATE INDIVIDUALS WITH DISABILITIES.