

## Position Description - Unclassified

### Position Status:

Position Title		Position Number
Controller		E99821
Appointment (9mos. / 12 mos. / Other)	Contract Period (from / to)	FLSA
12 mos.	July 1-June 30	Exempt
Position Type	Regular/Short-Term	
Full-Time	Regular	
Work Location	Department/Division	
Monmouth	Office of Accounting & Business Service	
Reports to	Reports to Position Number	
Vice President of Finance and Administration	E99686	
Incumbent	University ID #	
TBD		

### Program Information:

<p>A. Describe the general program in which this position exists. Include program purpose, size, scope and relationship to the University's mission.</p> <p>This position is located in the Western Oregon University Office of Accounting and Business Services (ABS). The ABS Office is responsible for all accounting and business operations of the institution and for processing and recording of all financial transactions. The operation of the ABS Office directly affects each of the institution's employees, students, suppliers, student sponsors, some employees of other state agencies, and some members of the public. The ABS Office has twelve employees, excluding student employees and temporary hires.</p>
<p>B. Describe the purpose of this position and how it functions within this program.</p> <p>The Controller reports to the Vice President for Finance and Administration &amp; CFO and provides leadership for the accounting, procurement, and auditing functions within the university.</p>



**Position Information and Qualifications:**

A. Description of Duties/Responsibilities – List the major duties assigned to the position. Note percentage of time each listed duty is performed to total 100%. Indicate “E” = Essential, “R” = Revised	
Percent of Time	Duties
55%	<ul style="list-style-type: none"> <li>Responsible for processing and reporting of all financial transactions of the institution.</li> <li>Responsible for policy setting, developing financial goals and objectives of the unit and university.</li> <li>Working in collaboration with the campus, oversees the annual closing of the books process.</li> <li>Prepare the university’s financial statements and annual Financial Reports, UBIT tax returns (if required), filings related to tax-exempt bonded indebtedness, coordinate with Sponsored Projects Office for the university’s federal Facilities and Administrative rate proposal, functional management of administrative data processing systems, including general and operating ledgers, accounts receivable, purchasing, accounts payable, fixed assets, grant and contract accounting, financial aid accounting, student fee assessment and refund/repayment in coordination with the bursar, and assuring appropriate stewardship of university funds and assets.</li> <li>Work with external auditors and program reviewers to facilitate and coordinate their work when needed. This includes Single Audit of grants and contracts, financial statement audits, and internal control reviews.</li> <li>Oversees the university treasurer. Implement best practices and keep abreast with new regulation and requirements in accounting and business services.</li> <li>Serve as a resource on accounting and business practices to the internal WOU clients and external community.</li> <li>In collaboration with the internal auditor offer robust training programs and periodic audits as needed to assure internal controls are working and fraud or other abuse is minimized.</li> <li>In collaboration with the CIO ensure ongoing PCI compliance.</li> </ul>
25%	<ul style="list-style-type: none"> <li>Supervise, support and manage the staff of the Controller’s Office and daily collaborate with the Bursar’s office (which reports directly to the Vice President for Finance &amp; Admin). In total these offices are three unclassified and nine classified staff.</li> <li>Performing accounts receivable and collections, financial aid accounting, purchasing, contracting, accounts payable, grant and contract accounting, and other related functions and management of a budget of approximately \$1.5M annually.</li> <li>Motivate teams of employees to sustain the highest level of productivity and commitment, and demonstrates the capacity to fully understand and manage myriad complex accounting, financial reporting and business-related issues necessary for effective university operations.</li> <li>Promotes diversity and inclusiveness through hiring practices, staff training and awareness measures.</li> </ul>
15%	<ul style="list-style-type: none"> <li>Work with the Vice President for Finance and Administration &amp; CFO to present to the WOU Board members and other internal and external constituencies as needed to promote a thorough understanding of the University’s financial policies and condition.</li> <li>Promote the tenants of transparent financial information where feasible. Maintain and update WOU policies and procedures and maintain up-to-date policies on the web for use by internal and external constituencies.</li> <li>Working with the Director of Budget and Planning and Bursar, support the annual student incidental fee process and creation of Tuition &amp; Fee books as needed. As assigned by the VP, represent WOU on numerous inter institutional committees or workgroups, such as Business Officers and campus committees as assigned or needed.</li> </ul>
5%	Other duties as needed



<b>B. Required Qualifications</b>
<i>List any certificates, licenses, academic degrees, or experience <u>required</u> to perform the duties of this position. Indicate if a combination of education and experience is acceptable.</i>
<ul style="list-style-type: none"> <li>• Bachelor’s degree in accounting or related field with 7 years of accounting experience.</li> <li>• Minimum of 3 years of related work experience, including management experience.</li> </ul>
<b>C. Preferred Qualifications</b>
<i>Describe preferred education, experience, skills, licenses, certificates, and other qualifications for this position.</i>
<ul style="list-style-type: none"> <li>• CPA, CMA, or Master’s degree in related field</li> <li>• Higher education experience</li> <li>• Ellucian Banner suite</li> </ul>
<b>D. Knowledge Areas</b>
<ul style="list-style-type: none"> <li>• Accounting/financial management principles, practices, and procedures</li> <li>• State and federal tax and regulatory codes</li> <li>• Ability to prepare and maintain complex and detailed financial worksheets and reports</li> <li>• Knowledge of a financial system</li> <li>• Analytical skills</li> <li>• Experience managing procurement services</li> <li>• Experience with preparing year-end financial statements</li> </ul>

**Budget Authority:**

Indicate the level of the position’s responsibility for the development, control, and monitoring of budget. Indicate the size of the budget. Check all that apply.		
x	Develops, monitors*, and controls* <i>*Monitor means to review and approve expenses; control means to authorize budget transfer at the department level</i>	\$1.5 million
	Delegated authority to monitor budget	\$
	Limited approval authority for purchase	\$
	Purchase only with higher level approval	\$

**Supervisory Authority:**

If this position has the authority to act or effectively recommend action affecting employees in the following areas, check all that apply.			
x	Hire	x	Assign Work
x	Transfer	x	Recommend salary adjustments
x	Discipline	x	Approve requests (i.e. leave)
x	Dismiss	x	Respond to complaints/grievances
x	Layoff	x	Conduct performance assessments

x	Promote	x	Give Direction
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**Positions Supervised:**

Type	# of Employees	Total FTE
Teaching faculty		
Classified staff		
x Unclassified staff	2	2
x Student Employees (average per term)	2	2
Other (specify)		

**Decision Making Authority:**

Describe the breadth and scope of decision-making authority and discretion the position has to formulate, implement, evaluate, approve and/or modify department and/or university policy, procedures, and/or programs. Describe the type of review and/or approval required by a higher level.
The Controller is responsible for establishing and maintaining an effective, efficient and compliant accounting and financial reporting system and system of internal controls. The Controller is also responsible for establishing and maintaining effective, efficient and compliant fiscal policies and business processes that support the teaching, research and engagement mission of the university. In carrying out these two primary responsibilities, the Controller shall work collaboratively with important constituents and constituent groups, including the President's cabinet and members of their respective staffs, WOU Foundation, the Associated Students of Western Oregon University (ASWOU), as well as other units within Finance and Administration (budget office, facilities services, campus public safety, treasury management and computing services) as well as managers of auxiliary services, University Shared Service Enterprises (USSE), etc.

**Additional Information:**

List any additional information that would help describe the nature of the position.

**Acknowledgement:**

Employee Printed Name	Employee Signature / Date
Supervisor Printed Name	Supervisor Signature / Date
Reviewer (VP / Director)	Reviewer Signature / Date
Appointing Authority	Appointing Authority Signature / Date

**HR USE ONLY:**

Received by	Date		
Position Class # (Ex. UF101)	Employee Class	Job Location	Appointment Percent

CUPA-HR# / Title	NOC Code	Category Code	SOC Code
<b>Actions Taken</b>			
	NBAPBUD/NBAPOSN		
	NBAJOBS		
	PEAFAC		
	Electronically Filed		