



Position brief for the position of Assistant Vice President for Accounting and University Controller Stony Brook University

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Opportunity Overview

Stony Brook University (SBU), a dynamic, internationally recognized research institution and public university within the SUNY System, is seeking an Assistant Vice President and Controller (AVP/Controller) to join its dedicated Finance team. The AVP/Controller leads a team of 45 people in all aspects of accounting and financial reporting for the campus and is responsible for improving and streamlining financial transactions and processes. In addition, the AVP/Controller oversees the successful implementation of automated services within this unit and ensures that technology solutions are implemented successfully. As the chief accounting officer for the university, the incumbent leads university accounting analysis programs and is liaison for all accounting issues in the absence of the Vice President for Finance (VPF). In addition to managing an accounting team of 21 people, the AVP/Controller also oversees the Bursar/Director of Student Accounts staff of 24 people and substitutes for the VPF at key internal and external meeting.

Opportunities and Expectations for Leadership

Building upon an already high functioning, customer service-oriented, lean department, the AVP/Controller will encounter the following opportunities and expectations for leadership:

Communications

Effective communications with a wide variety of stakeholders around both their needs and the work of the finance area is critical to the AVP/Controller's success. Clarifying technical information for non-finance stakeholders, including articulating the big-picture impact of major initiatives will be key. The opportunities to listen and learn in order to better integrate financial knowledge into the University's future plans will be many, and important to future success.

Collaborating with multiple partners across the campus, and the SUNY System

The AVP/Controller works closely with the many partner organizations across the campus, including the Research Foundation, the Stony Brook Foundation, the Hospital and Medical School, etc., as well as the System Finance office to ensure compliance with State and System regulations and devise ways for SBU and SUNY to better serve institutional priorities.

Technology

The AVP/Controller will take the lead on leveraging existing technologies that will streamline transactions and increase efficiency for the accounting and student account offices, thereby allowing staff to engage in more critical thinking and decision support. They will also have the opportunity to enhance and expand technology use particularly in the areas of reporting through the current data warehouse and reporting tools, and the identification and implementation of new strategies. These will include devising ways to support the communication between SBU and SUNY System office that increase automation and consistency between the two entities.

Team building and team development

Lead team by example and dedication to and excitement for Stony Brook's mission in support of students and the research enterprise.

Engage with leadership and staff to develop opportunities for mentoring, cross- training, and development of team members with an eye toward building bench for succession.

Advocate for additional team resources and headcount as needed.



About Stony Brook University

Founded more than 60 years ago and located some 60 miles east of New York City on more than 1000 acres on the North Shore of Long island, Stony Brook University is a leading, global research university. A member of Association of American Universities since 2001, Stony Brook offers more than 200 undergraduate programs, more than 100 master's programs, and more than 40 doctoral programs.

Stony Brook University — Brief Overview

Stony Brook University, widely regarded as a SUNY flagship, is going far beyond the expectations of today's public universities. With more than 26,000 students, 2,700 faculty members, nearly 200,000 alumni, an academic medical center and 18 NCAA Division I athletic programs, it is one of only four University Center campuses in the State University of New York (SUNY) system.

The University embraces its mission to provide comprehensive undergraduate, graduate, and professional education of the highest quality, and has been ranked among the top 35 public universities in the nation by U.S. News & World Report. Fostering a commitment to academic research and intellectual endeavors, Stony Brook's membership in the Association of American Universities (AAU) places it among the top 62 research institutions in North America.

The University's distinguished faculty have earned esteemed awards such as the Nobel Prize, Pulitzer Prize, Indianapolis Prize for animal conservation, Abel Prize and the inaugural Breakthrough Prize in Mathematics. Part of the management team of Brookhaven National Laboratory of the U.S. Department of Energy, Stony Brook is one of only eight universities that has a role in running a national laboratory. Providing economic growth for neighboring communities and the wider geographic region, the University totals an impressive \$7.23 billion in increased economic output on Long Island.

Mission Statement

The University has a five-part mission:

- to provide comprehensive undergraduate, graduate, and professional education of the highest quality;
- to carry out research and intellectual endeavors of the highest international standards that advance knowledge and have immediate or long-range practical significance;
- to provide leadership for economic growth, technology, and culture for neighboring communities and the wider geographic region;
- to provide state-of-the-art innovative health care, while serving as a resource to a regional healthcare network and to the traditionally underserved;
- to fulfill these objectives while celebrating diversity and positioning the University in the global community.

For more information about Stony Brook, please see: <https://www.stonybrook.edu/about/facts-and-rankings/>



The Position

The Assistant Vice President/Controller (AVP/Controller) is responsible for collaboration with individuals across the University at all levels and roles to ensure the University's financial policies, procedures, operations, and practices are effective and efficient in a highly decentralized environment. As a member of the VP/Senior Leadership team, the AVP/Controller also plays a key role in the direction and successful delivery of financial services. The AVP/Controller is responsible for all aspects of accounting and financial reporting for the campus. The AVP/Controller has direct management oversight for a wide range of institutional financial functions, including accounting (general, cost accounting, grants, capital projects), financial reporting, internal controls, treasury operations, student accounts, policies, and financial compliance.

As a member of senior administration, the AVP/Controller leads the accounting staff and Bursar/Director of Student Accounts through actively engaging team members in growth opportunities to develop departmental competencies, and leadership competencies through coaching and mentoring.

Accounting Services

Revenue Accounting
Expenditure and IFR Accounting
Cash Management and Special Programs
Athletics Department Accounting

Office of Bursar

Student Accounts
Parking Services Support
Campus Card

Duties & Responsibilities

- Manage the University accounting and financial reporting including oversight of the University's accounting processes (expense reporting, appropriation accounting, special program accounting, cash management, Research Foundation, income fund reimbursables, revenue accounting, affiliate billing, etc.).
- Oversight of the Bursar/Director of Student Accounts and all areas that fall under the position, including but not limited to the Cashier, Check Disbursement, and Input and Control functions of the Bursar's Office; the Student Billing Office; the Parking Services Office; the Campus Card Office.
- Playing visible role with University leadership and strategic management related to finance and accounting. Coordinate activities with the SUNY Controller's Office while addressing financial activities to comply with disbursement thresholds, reporting requirements, capitalization of assets.
- Ensuring the alignment of the University's financial master plan with the strategic initiatives by working closely with the VP, SUNY, and the Budget Office to design and implement the annual business and financial planning processes.
- Developing initiatives that will improve the campus compliance with State, Federal, and commercial banking requirements associated with credit card, refund check and ACH processing, and privacy concerns. Ensuring current and future technology meet all compliance requirements.
- Ensuring the financial management and reporting systems in development are responsive and provide campus with necessary information in a timely manner.
- Overseeing the further development of the data warehouse and data warehouse reporting to ensure the data warehouse provides university users with key



operational and strategic information to guide their respective units.

- Oversight of new and ongoing financial special projects from the day of kick-off until the project ends and into the evaluation state.



The Candidate

The AVP/Controller will possess the following professional qualifications and personal attributes:

Professional Qualifications

- Progressively responsible financial management experience in higher education. If not from higher education, leadership experience in large, complex, regulated environments. Non-profit experience an advantage.
- Proven financial acumen and the ability to translate technical concepts to diverse constituents.
- Demonstrated success working with technology systems, system analysis and system implementation.
- Skilled and inspirational manager of teams with attention to team mentoring, team development, and succession planning.
- Demonstrated track record promoting Diversity and inclusion.

Personal Attributes

- Commitment to student and research mission of SBU.
- Innate ability to interpret financial data and its short- and long-term impacts.
- Ability to think strategically and act tactically.
- Team player orientation.
- Active listener.
- Ability to multi-task.
- Customer service orientation.
- Committed, passionate and hardworking.
- Embraces challenges and finds solutions.

Essential Qualifications

- Bachelor's Degree in Accounting and a minimum of seven (7) years full time directly related, progressively responsible experience in financial management, preferably within higher education.
- Managerial, project management, team building, and superior communication skills will be critical to the individual's success as will excellent organizational and analytic abilities.
- Knowledge and understanding of system programming as it relates to financial processes will also be key.
- Master's Degree and CPA designation preferred.



How to Apply

In order to apply, please submit a comprehensive CV along with a cover letter which sets out your interest in the role and encapsulates the aspects of your experience relevant to the required criteria. Please include the names and addresses of three references. References will not be approached until the final stages and not without prior permission from candidates.

The preferred method of application is by email at: StonyBrook_Controller@odgersberndtson.com

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About Odgers Berndtson



Odgers Berndtson Executive Search is a leading global executive search firm, assisting private and public sector organizations find the highest caliber people for senior management appointments across North America and internationally.

Our reputation at the top of the executive search profession is over 50 years old. With offices in over 60 cities worldwide, our experienced executive search specialists operate with absolute discretion, integrity and care, and are expert in finding exceptional individuals for challenging roles.

WE ARE GLOBAL

We have the support of an excellent international network of offices on the ground.

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