

Senior Financial Planning and Analysis Officer

Duke Kunshan University

Job Description

Position Overview:

To be responsible for developing and executing an annual budgeting process, monitoring actual expenditures, conducting financial analyses to support management decisions, and identifying and advocating management actions for improved financial performance.

Reports to:

Financial Controller

Essential Duties:

- Maintain a University budget manual, update the annual budget schedule and templates, and optimize the budget process.
- Organize the preparation of the University annual budget and forecasts, ensuring that the budget units understand the requirements and submit the budget requests on time.
- Communicate with all the budget units to understand the underlying budget assumptions and assist in the preparation of reports for communications of the budget requests with the Board and board committees.
- Lead the preparation of multi-year financial planning assumptions and financial projections. Identify key operating and financial factors that will drive long-term programmatic success.
- Provide useful periodic and ad-hoc variance analysis reports for university management team to facilitate internal financial reviews or decisions. Prepare management reports and other analysis reports as required for the financial success of the budget units.
- Review the financial performance of programs to evaluate their contributions to the University's mission and financial success.
- Train program coordinators on using system tools and reports to monitor and analyze departmental funds.

- Understand the University's fund code structure and maintain all the fund codes. Provide instructions on using different categories of fund codes and ensure reliable accounting records for each fund code in the financial system.
- Optimize the budget function and reports in the financial system.
- Examine the support documents that support the reserve funds and track the status of reserve funds. Monitor the spending of the fund codes and communicate with responsible persons regarding the management of these funds.
- Review and process journal entries on a regular and ad-hoc basis as needed.
- Provide support during month-end, year-end closing period, and provide support for the annual statutory audit and interim review.
- Assist the controller in other aspects of finance and accounting operations and perform other ad-hoc assignments as needed.
- Other tasks as assigned.
- University employees' job responsibilities will continue to expand in scope and depth as the University grows in size and complexity in its programs.

Required Qualifications:

- Bachelor's degree in accounting or financial management; relevant professional certificate (e.g., CMA) is preferred;
- 5 years or more of experience in accounting and financial analysis including development of budgets, management reports and presentations;
- Ability to solve problems and present financial data and analysis effectively;
- Excellent interpersonal, communication, and organizational skills with the ability to work effectively both independently and as part of a team;
- Detail-oriented and accuracy-focused;
- Quick learner with the ability to identify and collect a variety of inter-related information from multiple sources;

- Excellent technical skills with MS; facility with other MS Office applications including experience creating PowerPoint presentations;
- CET 6 or above; good English writing and speaking skills.