



Kathleen Postal  
[REDACTED]

July 31, 2023

Dear Kathleen:

I am pleased to offer you the position of Chief Financial Officer for Associated Students Inc., California State University, Fullerton.

Attached you will find a job description, which outlines the specific duties for the position we are offering you. Also listed below are employee benefits and other specifics of your employment with Associated Students Inc., California State University Fullerton. Your responsibilities are provided in the attached job description and include other duties as assigned by your immediate supervisor, or other member of ASI Management.

- 1) In this exempt role, your annual compensation will be \$175,000.00. You will be classified as an exempt employee, which means that you will not be eligible for overtime pay.
- 2) You will report to Dave Edwards, Executive Director, and he can be reached by email at [daveedwards@fulleton.edu](mailto:daveedwards@fulleton.edu) or 657-278-7739.
- 3) Your employment is At-Will, meaning you are free to leave Associated Students, CSUF, Inc. at any time, without cause and/or notice, and Associated Students, CSUF, Inc. likewise has the right to terminate your employment at any time, with or without cause or notice. Only the Executive Director has authority to enter into any agreement for employment.
- 4) In addition, we are offering a one-time relocation allowance of up to \$15,000 to be reimbursed upon submission of original receipts.
- 5) Benefits include accrual of 16 hours of vacation and 8 hours sick leave per month. You will be eligible to participate in the health, dental, and vision insurance program the first day of the month following your effective date of employment.
- 6) Our offer to hire you is contingent upon the following:
  - (a) Submission of satisfactory proof of identity along with your legal authorization to work in the United States. A list of the documents to verify your identity and your authorization to work in the United States is available at the U.S. Citizenship and Immigration Services website: <https://www.uscis.gov/i-9-central/form-i-9-acceptable-documents> Details as well as instructions regarding your personal documentation are provided through this link. Please bring your documents with you on your first day of work. Failure to provide sufficient proof of identity and work authorization may delay your start and could potentially invalidate this offer of employment.
  - (b) As a requirement of your employment on the CSU Fullerton campus and in order to add you to the CSU-Fullerton systems and directories, you will be required to produce your Social Security Card.
  - (c) Your employment is also contingent upon acceptable screenings prior to your first day of employment. These include:
    - (i) Reference Check
    - (ii) Pre-Employment Screening
    - (iii) LiveScan Screening
- 7) Effective date of hire, you will be automatically enrolled in CalPERS Retirement at Tier 3, where 8.50% of your salary will be deducted from your paycheck on each pay date. The current PEPRA calculation is 2% at 62. If you have any further questions, please contact CalPERS directly.

- 8) Although your initial assignment is in the Administration department, you may be transferred to another department as business needs dictate.
- 9) Following the receipt of your signed acceptance of this offer letter and job description along with the completion of all contingencies listed in section 7 of this letter, unless otherwise negotiated, you may begin your employment with Associated Students Inc., CSUF. You will be contacted by Human Resources to set your start date. **We are currently estimating your start date to be September 11, 2023.** You may report directly to Human Resources at 8:30 AM beginning your first day.

If you agree with and accept the terms of this employment, please sign below, and return this letter to our office.

It is with great pleasure that we welcome you to the Associated Students Inc., CSUF team. We look forward to a mutually successful business relationship. If there is anything that we can do in order to make your employment with Associated Students Inc., CSUF successful and enjoyable, please do not hesitate to contact me, your supervisor, or ASI Management.

Sincerely,

Dr. Dave Edwards  
*Executive Director*  
Associated Students Inc., CSU Fullerton  
657-278-7739

CC: Andrea Okoh, HR Director

I, \_\_\_\_\_, accept the terms of this offer of employment as stated in this letter, meaning you are free to leave Associated Students, CSUF, Inc. at any time, without cause and/or notice, and Associated Students, CSUF, Inc. likewise has the right to terminate your employment at any time, with or without cause or notice. Only the Executive Director has authority to enter into any agreement for employment.

Accepted by: \_\_\_\_\_ Date: \_\_\_\_\_



## Job Description

**Job title:** Chief Financial Officer    **CSU Comparable:** Administrator III

**Work Location:** ASI- Administration Office

**Division/Department:** Administration

**Reports to:** Executive Director

**Supervisory Position**

☒ Yes  
☐ No

☒ Exempt  
☐ Nonexempt

☒ Staff  
☐ Student

☒ Full-time  
☐ Part-time

Under the general supervision of the Executive Director of Associated Students Inc. (ASI) the Chief Financial Officer serves as the principal corporate administrator of ASI.

The Chief Financial Officer, a member of the ASI leadership team, is responsible, with the Executive Director and the ASI Board of Directors (BOD), for collaborative management, implementation, and oversight of ASI financial services, facilities, and organizational infrastructure. Specifically, the Chief Financial Officer provides leadership to the functional areas of accounting and finance, administration, and policy development, building engineering, information technology, internal audit, and other administrative functions.

The Chief Financial Officer collaborates with university colleagues to support ASI success. This position is delegated a high degree of responsibility, makes recommendations on fiscal policies and procedures and is responsible for supervising and implementing such recommendations upon approval. The Chief Financial Officer serves as ASI administrator in charge in the absence of the Executive Director and the Associate Executive Director.

### **Business Operations Responsibilities:**

1. Oversees the development and implementation of ASI's major administrative and operational policies, procedures, and projects.
2. Works directly with Executive Director to effectively utilize resources and staff by reviewing and assessing long and short-term strategic planning objectives, operational policies, accounting procedures, staffing levels, and general administrative services.
3. Interprets and educates staff and student leaders on ASI fiscal policies, university policies, California Education Code, and Nonprofit Corporate Code.
4. Reviews and provides input and approval for all corporate contracts, as delegated by the Executive Director.
5. Meets regularly with department directors to ensure effective management of daily operations. Provides direction and assistance with financial impact of operations and recommends operational adjustments to improve overall service delivery and financial success.
6. Recommends improvements to business processes and overall functions of the organization to ensure best practices and sound utilization of current technology.

### **Fiscal Responsibilities**

1. Directs and performs financial planning and review to meet short and long-range corporate needs such as changes in departments, facilities acquisition and development, equipment, personnel, and programs that may have a major financial impact on ASI; develops plans when necessary.
2. Responsible for all cash management activity within the organization to meet short and long-term financial requirements. Examines and translates financial information related to specific business decisions, reports on operating results, cash flow, financial forecasts, restricted fund activities, investments, and related issues.
3. Examines investments and consults with appropriate staff and investment managers regarding investment needs and maximization of investment income. Makes investment recommendations to the Executive Director and the Investment Committee of the Board of Directors.

4. Works closely with financial institutions, bond counsel, underwriters, University and Chancellor's Office personnel, and rating agencies to finance capital acquisitions. Negotiates contracts as required. Ensures that ASI remains in compliance with all requirements related to debt service covenants.
5. Supervises and manages the accounting and finance department, ensuring compliance with all federal and state laws, CSU system requirements, ASI policy and procedures, and GAAP and GAS standards.
6. Participates in formulating and implementing financial and administrative policies, objectives, and programs. Serves as a consultant on financial issues for the Executive Director, Board of Directors, management staff, and project personnel regarding financial issues concerning the administration and operation of corporate services and facilities; research issues for resolution of problems; and develops recommendations regarding ASI operations, taxes, policies, services, and operating guidelines.
7. Oversees the multi-entity organization and consolidation of entities for the annual audit. Provides financial support for all required audit functions and ensures the corporation meets the required deadlines for external, university, and Chancellor's Office Audits.
8. Prepares and manages the annual budget process for the organization.
9. Develops and manages a system of internal controls for sound corporate financial management.
10. In consultation with the Executive Director, establishes and maintains sound fiscal records, policies, and procedures.
11. Monitors budgets and reviews financial standing with Controller on a monthly basis, at minimum, within the context of the ASI budget. Responsible for all issues within the overall operation of the Finance and Accounting monthly activity and reporting including payroll.
12. Collaborates with and supports the ASI Assistant Director of Corporate Affairs to ensure efficient and accurate administration of the university's Instructionally Related Activities funds in compliance with applicable university procedures.
13. Responsible for the insurance renewal annually and review of the coverage components. Participates in the AORMA training to ensure coverage of operations and facilities is adequate.

#### **Internal Audit**

Supervises the Internal Auditor who:

1. Maintains a reporting relationship with the Executive Director:
2. Ensures ASI departments maintain compliance with management directives, applicable statements of policy and procedures, and all required university, CSU, and state guidelines.
3. Reports any and all findings concerning weaknesses, improvements, and corrections to Executive Director.
4. Ensures audit work is planned, executed, and conducted in compliance with the standards for the professional practice of internal auditing as identified by the Institute of Internal Auditors and applicable CSU standards.

#### **Building Engineering**

Supervises the Director of Building Engineering and Facility Planning who:

1. Ensures the maintenance of all ASI facilities through the effective management of the building engineering department.
2. Collaborates with university capital projects, construction, design, and facility staff on all ASI facility projects and upgrades.
3. Coordinates capital construction activities for the purpose of ensuring that all phases of construction project are completed within specifications and with minimal interruption to personnel and services.

#### **Diversity, Equity, and Inclusion**

1. Support ASI's DEI plan in all services and interactions.

#### **Education, Work Experience Requirements and Abilities:**

##### Education:

Bachelor's degree in accounting, Business Administration, Public Administration or related field from an accredited four-year college or university.

Master's degree in accounting, Business Administration, Public Administration, or related field from an accredited four-

year college or university is preferred

CPA preferred.

Experience:

Substantive experience in financial affairs in a non-profit organization. Minimum of ten years of progressively responsible accounting and operational experience in the coordination of business and financial affairs within a non-profit setting. Minimum of seven years supervisory/managerial experience. Experience in identifying, analyzing, and developing solutions to financial and business-related problems.

Knowledge, skills and abilities:

- Demonstrated ability to work with ethnically diverse and culturally pluralistic student body and staff.
- Demonstrated ability to lead during change and to create collaborative working relationships.
- Excellent oral and written communication skills.
- Ability to motivate and work closely with college students.
- Demonstrated ability to utilize current industry standard software and applications.
- Non-profit and operations management preferred.
- Strong organizational skills and capable of multitasking.
- Ability to establish and maintain effective and cooperative work relationships within a diverse campus environment.
- Addressing others by name, title or other respectful identifier and respecting the diversity of our work force in actions, works and deeds.
- Addressing problems and issues constructively to find mutually acceptable and practical business solutions; and
- Respecting the diversity of our work force in actions, works, and deeds.

Core Competencies

- Governance, Risk and Controls
- Leadership and Management
- Communication Skills
- Ethics and Professionalism
- Staff Development and Team Building
- Strategic Planning and Execution
- Financial Planning and Analysis
- Financial Reporting
- Process Improvement
- Budget Planning/Administration

**Additional Requirements:**

Typical Working Conditions

Work performed in a temperature-controlled office environment. Maintain and deal with a wide variety of public contacts including campus officials, members of the Board of Directors, staff, students, and campus community.

Special Requirements:

- Upon hire employment history, criminal, and employment background check will be completed.
- First Aid and CPR Certification within six (6) months of employment.
- Required to be a Mandatory Reporter and sign ASI Mandatory Reporter Form.

**Print Employee Name:**

**Employee signature:**

**Date:**