



Inviting Applications and Nominations for

Director of Student Account Services

ABOUT THE UNIVERSITY

The University of Montana (UM) is a multi-campus, flagship, public research university serving the state of Montana and region. The main campus is located in Missoula, as is Missoula College—the two-year college of UM, with additional campuses in Helena, Butte, Dillon, and Hamilton.

The University draws a diverse, global population to Missoula that helps cultivate an educated, engaged, and vibrant community. The main campus, nestled in the heart of western Montana's stunning natural landscape, spans 56 acres at the base of Mount Sentinel and along the Clark Fork River. It includes the park-like Oval at the center of campus, more than 60 architecturally unique buildings, and a 25,200-seat football stadium. UM's 180-acre South Campus offers student housing, a

golf course, soccer and softball fields, and an outdoor track facility. Missoula College occupies two sites, one just across the river from the main campus and one on the southwest side of Missoula.

At UM, students receive a world-class educational experience in a broad range of subjects that include the trades, humanities, sciences, graduate and postdoctoral study, and professional training. The University of Montana comprises 10 colleges and is home to a variety of research centers and institutes.

More than 10,000 students attend the University of Montana. The student-to-faculty ratio is 13:1 with an average class size of 30. UM's College of Business is tied at No. 1 as "Best Business School in the Big Sky Conference" by *U.S. News & World Report* (2020).

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UM's campus is located in the aboriginal territories of the Salish and Kalispel people, and the community is committed to the indigenous populations the University serves. Today, the University honors the path they have always shown UM in caring for this place for generations to come.

The University of Montana ranks 17th in the nation and 5th among public universities in producing Rhodes Scholars. It has 11 Truman Scholars, 14 Goldwater Scholars, and more than 40 Udall Scholars to its name. Currently, 26 outstanding freshmen are Presidential Leadership Scholars.

Offering more than 100 different student organizations, UM students have opportunities for community service, recreation, professional development, and more.

As Montana's flagship university, and the second largest campus in the Montana University System, UM sets the bar high for academic studies, creative accomplishments, and scientific exploration that benefits students, their communities, and the world at large.

In athletics, the University of Montana's Grizzlies are part of the NCAA Division I. The Grizzlies have competed in the NCAA's Big Sky Conference since the conference was formed in 1963. Intercollegiate sports include football, basketball, men's and women's cross country, women's golf, men's and women's track and field, men's and women's indoor track and field, men's and women's tennis, women's volleyball, women's soccer, and women's softball. Intramural sports include men's and women's lacrosse, the Alpine Ski Team, rowing, dance and cheer, men's and women's ice hockey, men's soccer, the Woodsman Team, rodeo, the Missoula Footbag Alliance, triathlon, cycling, fencing, Jesters Rugby, and Betterside Women's Rugby.

THE OPPORTUNITY

The University of Montana seeks a financial professional to serve as the Director of Student Account Services. This administrator is responsible for all areas of the University's Student Accounts Receivable system and reports to the Associate Vice President for Operations and Finance.

The Director of Student Account Services oversees the Student Account Services functions of the University of Montana, including the payment phase of the registration process and application of all financial aid. To be successful, this leadership role requires experience administering student accounts and knowledge of FERPA.

As Student Account Services is a critical integrated service area, the Director is required to work cooperatively and collaboratively with many various personnel and departments across the University to maximize a positive student experience, financial performance, creativity, and problem solving, to achieve the best possible results.

The Director of Student Account Services manages federal and institutional student loan programs to comply with generally accepted accounting and best cash management practices, consumer collection laws and practices, federal and state regulations, as well as donor requirements. The Director also develops and implements policy regarding the aspects of the student accounts function at the University.

The Director of Student Account Services provides guidance and assistance with loan programs and is

responsible for maintaining current knowledge of applicable state and federal rules and regulations. This knowledge is applied in creating, updating, implementing, and providing ongoing training and in establishing procedures and guidelines to ensure efficient operations of the Student Accounts Receivable and Student Loan Collection functions.

OPERATIONAL RESPONSIBILITIES

The Director of Student Account Services is responsible for ensuring students' financial transactions are handled efficiently, accurately, and in compliance with all applicable regulations while managing the following functions: Student Accounts, Student Loan Collection, Cashiering, and Accounts Receivable.

The Director frequently interacts with students, faculty, and other employees as well as external funding entities to help ensure procedures are streamlined, efficient, and meet university standards. Significant collaboration with Financial Aid, the Registrar, and other offices to resolve issues with student accounts in a timely fashion, especially during high-volume times of the year, is extremely important.

The Director of Student Account Services works in conjunction with Financial Aid with the return of Title IV funds for federal financial aid funds and ensures student refunds are accurate and timely and in accordance with all local, state, and federal regulations. This position also reviews financial accounting reports to ensure accuracy and timeliness of student account transactions; oversees the student appeal process (including updates to student accounts); monitors student account charge-offs; and oversees activities with the student account payment plans.

SUPERVISORY AND POLICY MANAGEMENT RESPONSIBILITIES

The Director of Student Account Services is responsible for hiring, disciplinary actions, mentoring, evaluating, and supervising the Assistant Manager of Student Account Services, the Student Loan Specialist, Student Accounts Specialists and Treasury Staff. Additionally, the Director provides oversight and leadership for their employees, including evaluating performance of the individuals supervised, as well as the team as a whole.



Department Mission Statement

The mission of Business Services is to provide financial services responsive to the needs of students, staff, administration, and faculty of the University of Montana.

We accomplish our mission by wholeheartedly supporting the pursuit of academic excellence. We proactively meet challenges, enhance services, and achieve productive results. We deliver exceptional customer service to all that require our assistance to successfully reach their educational goals.

Stacey Eve, Associate Vice President for Operations and Finance



Stacey Eve has served in the leadership role of Associate Vice President for Operations and Finance at University of Montana since March 2020. Ms. Eve has been with the University of Montana since 2018, when she was retained to serve as the Budget Director.

Ms. Eve started her career in higher education in 2010 as the Director of Accounting and Human Resources for the University of Providence (formerly the University of Great Falls) in Great Falls, Montana. She became the Vice President for Finance and Chief Financial Officer in 2011, serving in that capacity until 2018. Along with fiscal responsibilities, Stacey's experience also includes a range of non-financial operations, planning, and compliance activities. Prior to embarking on a career in higher education, her experience included progressively responsible leadership roles in accounting, finance, human resources, and administration.

Ms. Eve earned a Bachelor of Science degree in Business Administration from the University of Providence (formerly the University of Great Falls) and an MBA from Concordia University-Portland.

The Director of Student Account Services manages and coordinates activities of staff engaged in keeping complete records of tuition and fees and other receipts for the University. The Director supervises employees in the Student Accounts Services office, billing and receivables, and cashiering functions. This role includes providing direction in reviewing and amending related fiscal policies and ensuring compliance with university, state, and federal regulations and standard accounting procedures. The Director consistently encourages employees to have customer service-oriented interactions with students, parents, and other university personnel at all times.

The Director of Student Account Services is responsible for the following supervisory, policy, and other responsibilities:

- Supervises and reviews the functions related to the cash receivables of the University including, but not limited to, student accounting and third-party payment transactions
- Supervises and reviews the function and performance of staff and activities within Student Account Services
- Assists with the development and implementation of policies and procedures
- Supervises the certification of students who qualify for legislatively established tuition and fee exemptions
- Reconciles general ledger accounts that include student receivables
- Supervises the daily operation of bank deposits
- Ensures employees are trained in the areas of student financials and accounts receivable/billing processing
- Coordinates with external cash processing vendors on student payment plans and prepares reconciliation to student receivables
- Prepares and discusses employee reviews and planning
- Assists in the preparation of various financial statements
- Assists the Office of Research and Sponsored Programs to prepare the Schedule of Expenditures of Federal Awards (SEFA) for the Uniform Guidance audit, ensuring completeness and accuracy
- Handles other duties as assigned by supervisor

MINIMUM POSITION KNOWLEDGE, SKILLS, AND ABILITIES

The Director of Student Account Services requires the following education and experience:

- Bachelor's degree in business, finance, or related field
- Four or more years of experience at a similar institution of higher education
- Management and supervisory experience in a finance/customer service environment
- Knowledge of complex integrated enterprise resource management software, such as Ellucian/Banner Finance, Ellucian/Banner Student, and other Ellucian products to produce accurate billing statements and provide excellent student support
- Knowledge and experience with ECSI loan servicing system
- Knowledge of PC software (Word, Excel, Access, Outlook, PowerPoint) including advanced Excel skills, such as Vlookup, Index, and Pivot Tables
- Experience with a third-party payment tool, such as Touchnet or Nelnet ePayment
- Experience with implementing student retention strategies
- Understanding of good business practices, including internal control principles
- Expert knowledge of financial aid program legislation as well as internal and external reporting requirements
- Knowledge of IRS rules to supervise, generate, and distribute form 1098-T to students

The Director of Student Account Services requires the following skills and abilities:

- Aptitude for interpreting and communicating financial data to individuals from a non-financial background
- Successful experience managing multiple projects and priorities proactively
- Analytical and problem-solving skills
- Proficient in preparing, formatting, and reviewing business correspondence and reports, including publicly published materials (i.e., website, catalog)



- Highly developed interpersonal, communication, presentation and organizational skills and the ability to draw from experience in creating creative solutions to meet the University's objectives and serve students while maintaining compliance with applicable rules and regulations
- Ability to treat sensitive information with discretion, demonstrate tact and diplomacy, possess excellent negotiation skills, and be able to make decisions supported by policy
- Highly developed ability to prioritize and arrange job assignments
- Excellent analytical and problem-solving skills
- Proficient in oral and written English communications
- Excellent interpersonal, communication, and organizational skills with attention to detail
- Ability to establish and maintain harmonious and effective work relations with students, staff, faculty, and the general public
- Ability to work independently and meet deadlines or as part of a team and to be adaptable to changing job requirements and deadlines
- Conflict resolution skills and calm presence to de-escalate students in financial difficulty
- Experience streamlining and automating processes and working for continuous process improvement
- Student-centered focus and work ethic

- Ability to actively foster a respectful, positive work environment that welcomes all persons
- Demonstrated interest in developing financial literacy skills among students

POST-TRAINING POSITION KNOWLEDGE, SKILLS, & ABILITIES

- Interpret University, state, and federal policies and procedures
- Develop and compile reports from Banner
- Demonstrate flexibility in approaching students and parents in difficult situations while maintaining composure and professionalism
- Possess strong knowledge of federal financial aid Title IV & US Department of Health & Human Services, Public Health Services Act and Title VII regulations, University registration and fee payment policies, contract laws and privacy laws
- Communicate effectively with support staff, departmental users and University administrators
- Guide and establish credibility with campus departments
- Make decisions, plan, and prioritize tasks, always keeping University objectives and student service in mind

PREFERRED EDUCATION, EXPERIENCE, KNOWLEDGE, SKILLS, AND/OR ABILITIES

- Master's degree in business, finance, or related field
- Seven or more years of experience at a similarly sized and ranked institution of higher education
- Knowledge of Ellucian/Banner Finance, Ellucian/ Banner Student, and other Ellucian products
- Able and willing to assist other areas as needed within the Business Services Office
- Working knowledge of generally accepted accounting principles (GAAP) and Governmental Accounting Standards Board (GASB) guidelines



The University of Montana has committed to the principles of equal opportunity, that everyone should have access to opportunities in their education and in the workplace, and to ensure that no one is excluded from participation. It has a program of affirmative action, which is required of federal contractors such as universities and is intended to eliminate the present effects of past discrimination and to increase the participation and employment of women, minorities, certain classes of veterans, and people with disabilities.



Living in Missoula, Montana's Garden City

Missoula, the second largest city in the state, is nestled in the Northern Rockies of Montana, between Montana's crown jewels, Glacier and Yellowstone National Parks. Surrounded by seven wilderness areas, five mountain ranges, and at the confluence of three rivers—Clark Fork, Blackfoot, and Bitterroot—Missoula is an outdoor enthusiast's dream.

The city has more than 400 acres of parkland, 22 miles of trails, and nearly 5,000 acres of conserved open space. You can kayak, raft, or tube through downtown or take a hike to enjoy pure nature just minutes away. Missoula is located within the fly-fishing Golden Triangle, known for its blue-ribbon trout fishing and spectacular natural beauty. The outdoor recreational opportunities are limitless.

Founded in 1864, Missoula is considered the cultural center of Montana. More than 72,000 residents enjoy a

cost of living substantially lower than the national average.

Missoula's expansive bike routes have led to its recognition as the 4th best bike commuting city in the United States. Public transportation primarily serves the center of the city and the University of Montana. Average commutes take between 10 to 15 minutes, well below the national average.

The vibrant downtown community embraces the state's most sophisticated music and art scene and includes a new public library that houses the Families First Learning Lab, UM's spectrum science museum, and the UM Living Lab. Just east of Missoula is the KettleHouse Amphitheater, ranking No. 45 out of the top 50 amphitheaters worldwide by Pollstar.

Missoula is easily accessible by intersecting highway systems running north-south and east-west and is served by Missoula International Airport.

APPLICATION & NOMINATION PROCESS

Confidential inquiries are welcomed, and nominations are invited.

Applications

- 1) Application packet must include:
 - a) A letter of application that addresses the responsibilities and qualifications of the position
 - b) Current resume
 - c) At least four references with full contact information including e-mails (*References will not be contacted without consent from applicants.*)
- 2) Submit application packet (preferably as PDFs) to:
UMT-DirStudAcct@myersmcrae.com

Additional information will be requested upon receipt of application.

Review of applications begins **January 21, 2022**. Applications will be accepted until the position is filled.

Nominations

Submit nominations to:

UMT-DirStudAcct-nominate@myersmcrae.com
 with complete contact and e-mail information for the individual being nominated.

Kenny Daugherty, President, and **Brianna Douglas**, Consultant, of **Myers McRae Executive Search and Consulting** are assisting University of Montana with this search.

