UNIVERSITY OF SOUTHERN CALIFORNIA

Director of University Taxation

Job Code: 113441

OT Eligible: No
Comp Approval: 7/6/2016

JOB SUMMARY:
Oversees all necessary tax reporting for the University, except for property tax and payroll tax matters. Represents the University in tax-related matters. Reviews certain taxable fringe benefits for the University and reports accordingly for W-2 purposes. Serves as a Subject Matter Expert in University tax-related matters. Maintains currency with, understands and ensures core compliance with all local, state and federal tax codes as they pertain to the University. Oversees the implementation and execution of tax internal control processes. Partners with schools/departments in order to provide tax guidance and assistance as needed.

JOB ACCOUNTABILITIES:

*E/M/NA % TIME

Oversees all necessary tax reporting for the University, except for property tax and payroll tax matters. Directs the preparation and authorizes the filing of all required city, state, and federal returns, including any necessary quarterly filings, including all related analysis and support. Prepares and files Department of Labor Forms 5500 for Health, Severance, and Disability Plans. Manages the tax reporting for Faculty / Staff loan program.

Represents the University in tax-related matters. Serves as the University's primary liaison with federal, state, and city tax authorities. Manages external tax authorities and consultants, to ensure the most efficient and effective tax position for the University.

Reviews certain taxable fringe benefits for the University, (e.g., University Provided Vehicles, relocation packages, etc.) and reports accordingly for W-2 purposes.

Serves as a Subject Matter Expert in University tax-related matters. Responds to technical questions and advises senior administration of the tax advantages or disadvantages of business decisions. Develops and designs overall tax planning strategies and policies and assists in their implementation.

Maintains currency with, understands and ensures core compliance with all local, state and federal tax codes as they pertain to the University. Ensures senior management and staff are informed of any changes and updates in a timely manner.

Oversees the implementation and execution of tax internal control processes. Coordinates internal tax auditing. Participates in the management of federal, state, and local tax audits and coordinates responses to inquiries and notices.

Partners with schools/departments and develops and maintains strong relationships with key personnel in order to provide tax guidance and assistance as needed. Provides consultative services and training to faculty and staff on tax-related matters, as needed, in areas such as sales/use tax, unrelated business income, and loan processes. Guides schools/departments through tax-related processes and recommends best practices.

Prepares and files Foreign Bank Account reporting due for the University as well as for employees with signature authority and no financial interest.
Complies with all new ACA reporting requirements, reports and pays in a timely manner.

Identifies activities and transactions in which the University has tax exposure. Ensures the University’s tax exempt status and handles all issues accordingly.

Serves as liaison with IT staff on all technical matters relating to tax applications. Performs other related duties as assigned or requested. The university reserves the right to add or change duties at any time.

*Select E (ESSENTIAL), M (MARGINAL) or NA (NON-APPLICABLE) to denote importance of each job function to position.

EMERGENCY RESPONSE/RECOVERY:

Essential:  

Yes  In the event of an emergency, the employee holding this position is required to “report to duty” in accordance with the university’s Emergency Operations Plan and/or the employee’s department’s emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.

JOB QUALIFICATIONS:

Minimum Education:
- Bachelor’s degree
- Combined experience/education as substitute for minimum education

Minimum Experience:
- 7 years

Minimum Field of Expertise:
- Bachelor’s degree from an accredited university in Accounting or Finance with an advanced degree in Tax is preferred. A minimum of 10 years combined experience in public accounting and in a university setting.

Preferred Education:
- Master’s degree

Preferred Experience:
- 10 years

Preferred Field of Expertise:
- The candidate must have significant knowledge of US federal and state income tax, possess strong issue recognition, be proficient at tax research, and have excellent presentation skills. The candidate must have outstanding communication skills and have the ability to successfully manage multiple priorities. A Master’s Degree in Taxation is preferred.

Skills:  Other:
- Analysis
- Assessment/evaluation
- Communication -- written and oral skills
Conceptualization and design
Consulting
Interpretation of policies/analyses/trends/etc.
Knowledge of applicable laws/policies/principles/etc.
Lead/guidance skills
Organization
Planning
Problem identification and resolution
Project management
Public speaking/presentations
Research
Statistical analysis
Teaching/training

Skills: Machine/Equipment:
Adding machine
Calculator
Computer network (department or school)
Computer network (university)
Computer peripheral equipment
Fax
Personal computer
Photocopier

SIGNATURES:

Employee: ___________________________ Date: ___________________________

Supervisor: __________________________ Date: ___________________________

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

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