

Human Resources
POSITION DESCRIPTION (HR 120)

CLASSIFICATION: Administrator II	DEPARTMENT: Office of the Provost
WORKING TITLE: Director of Budget and Finance	FLSA: Exempt
	INCUMBENT:

POSITION DESCRIPTION:

Under the general direction of the Provost, the Budget and Finance Director provides specialized Directorial services related to resource management including providing leadership of a strategic nature through organizational college and division planning activities, and the development and evaluation of highly complex programs with broad impact.

The Budget and Finance Director works independently and is accountable for the accuracy and completion of complex assignments involving detailed budget and financial analysis. This position will develop and track annual budgets, advise the Provost on long-range fiscal planning, ensure that institutional data reported by the colleges and division administrative areas are accurate and that data used by all Academic Affairs areas are interpreted consistently for decision-making purposes.

Responsibilities include oversight of sensitive or confidential matters and diplomatic communications with the division's internal and external stakeholders. The position works closely with financial personnel in the colleges and other units in the division, tracking and coordinating budgets and expenditures for reporting and alignment purposes. Additionally, the Budget and Finance Director may supervise staff, provide training for members of the Provost's administrative and leadership team, and offer consultative services to the college's administrative and leadership teams. As directed by the Provost, the Director of Budget and Finance sits on committees such as the Campus Fee Advisory Committee and others.

DUTIES AND RESPONSIBILITIES:

The following examples illustrate typical work activities and are not meant to be all inclusive or restrictive:

ESSENTIAL JOB FUNCTIONS	Daily	90%
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FINANCIAL OPERATIONS AND RESOURCE MANAGEMENT:

- Serve as a resource to the Provost to provide reliable, relevant information in order to facilitate resource planning and budgeting.
- Research and interpret financial policies and procedures. Provide oversight and operational controls to ensure compliance with campus policies and procedures and applicable laws. Proactively address accountability and liability issues.
- Maintain comprehensive annual and multi-year budgets that communicate resource allocations to the division's academic departments and other administrative units. Document the transfer of funds, monitor income and expenditures, and forecast future resource conditions.
- Evaluate fiscal impact of faculty assignments for strategic planning purposes.
- Plan and perform studies and create reports that support Cal Poly's academic mission, goals, and strategies.
- Participate in professional forums to keep abreast of trends and issues pertaining to institutional effectiveness and incorporate best practices into divisional and university initiatives.
- Consult with colleges and administrative areas on the development of financial aspects of business cases for complex projects.
- In collaboration with colleges and other areas in Academic Affairs, develop new approaches and solutions for business processes and troubleshoot and resolve complex resource problems.
- Consult with college and department finance staff regarding best business practices for utilization of specific funds, including lottery funds and college based fee funds.

RESEARCH, ANALYSIS AND RECOMMENDATIONS:

- Provide expert consultation to the division's academic and administrative areas on the development and administration of procedures related to budgetary and financial arrangements and activities. Evaluate the impact

of recommended or implemented procedures covering all aspects of resource management from a strategic and operational perspective.

- Collect and interpret data; provide statistical analyses; design and conduct research projects and program evaluations in support of divisional planning and assessment processes.
- Select and use appropriate tools including spreadsheets and databases to extract data from multiple sources and undertake complex queries.
- Communicate research, analysis, and recommendations clearly and concisely.

ADMINISTRATION

- Develop and maintain the division's business process documentation. Devise forms, prepare memoranda and create templates to facilitate financial transactions and other data reporting. Post electronic records on shared workspaces as appropriate and maintain the division's fiscal and institutional data files.
- Provide expert support for financial and systems training and advisement of the division's management including deans, department chairs, administrative coordinators as well as individual faculty and staff members.
- Analyze existing processes and workflows and recommend improvements. Implement new processes and technology as required by the university and promote their effective use across the division.
- For budgetary and financial matters act as liaison between the Provost and the deans, financial staff, and other campus administrative offices such as AFD. Represent the division in communications related to resource management and institutional data with staff outside of the division.

OTHER JOB FUNCTIONS

As Needed

10%

- Perform other duties as needed to fulfill position responsibilities, or as assigned.
- Perform special projects as assigned.
- Plan and undertake an ongoing professional development program that will maintain currency in knowledge and skills related to position responsibilities.

MINIMUM QUALIFICATIONS:

EDUCATION AND EXPERIENCE:

Bachelor's degree in business, accounting, finance, or a related field and seven (7) years of progressively responsible experience in financial management work or equivalent. A Master's degree in a related field may be substituted for two (2) years of experience.

LICENSES, CERTIFICATES, DEGREES, CREDENTIALS:

REQUIRED QUALIFICATIONS (SKAs):

- Skills in operational and fiscal analysis, organization and planning.
- Ability to maintain high quality/standards of work, leadership, ethics, commitment, and professional responsibility and judgment. Ability to represent the university and its interests in a professional and conscientious manner.
- Thorough knowledge of administrative survey techniques, business process cycles, calendars and system processing needs including functions, input/output, dependencies, processing options, and timing considerations; methods and procedures for research and statistical analysis and the ability to apply them in order to meet programmatic or administrative goals.
- Expertise in, and advanced knowledge of, principles and best practices associated with public and business administration, fiscal management, record keeping, and budgeting in a complex environment, including the use of generally accepted accounting principles.
- Demonstrated ability to use appreciable judgment to interpret, apply, and develop policies and procedures.
- Thorough knowledge of administrative concepts, practices and procedures to research, develop and evaluate policies and programs, including collection, evaluation and interpretation of data and information from a wide variety of sources to develop sound conclusions and make appropriate recommendations. Ability to assess and formulate the impact of recommended or implemented policies from a strategic and operational perspective.
- Strong working knowledge of information systems, reporting software, and multiple complex database practices, including an understanding of system tables, data integrity management, and the working relationships/interfaces between those data bases.
- Expertise in investigating and analyzing problems from a broad and interactive perspective; using appreciable ingenuity and innovation to conceive of new approaches and strategic solutions to address complex problems and issues.
- Strong ability to interpret, apply, work with, and explain to others a variety of complex academic policies and procedures (including pertinent laws and regulations) and understand the underlying intent when processing exceptions and/or requesting exceptions to be reviewed/approved; perform data management transactions with accuracy and efficiently, sound judgment and professional integrity.

- Ability to effectively lead projects, as well as teams, in understanding objectives, gathering requirements and issues, evaluating and arriving at solutions, completing tasks and action items, and meeting project deadlines.
- Excellent communication skills; ability to effectively communicate in a clear and understandable manner, both verbally and in writing.
- Demonstrated skills as a self-motivated, highly productive, independent worker who is results and customer service oriented, with the ability to problem solve on a frequent basis. Exceptional organizational and time management skills with the ability to independently prioritize and coordinate multiple and shifting objectives, transitioning from projects/assignments as needed.
- Demonstrated ability to update documentation of procedures; clearly and professionally respond to email; prepare and compose memorandums, official correspondence.
- Demonstrated ability to effectively compile and maintain complex and extensive records, prepare reports and summaries, and effectively present ideas and concepts in written or presentation format using consultative and facilitation skills to gain consensus.
- Excellent computer skills and proficiency with a variety of computer applications including word-processing, spreadsheets, databases, on-line systems, Internet as well as online calendaring and email. Capacity to learn and adapt quickly to new technology, software, situations, methods and procedures; general interest in making full and efficient use of information technology and resources.
- Demonstrated consultative skills and ability to use tact and diplomacy to effectively handle a broad range of high level and sensitive interpersonal situations with diverse personalities, and to respond appropriately to conflicts and problems.
- Ability to initiate, establish, and foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in and outside the University with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds.
- Demonstrated ability to maintain a high degree of confidentiality.
- Ability to quickly learn university infrastructure, policies and procedures.

PREFERRED QUALIFICATIONS:

- Master's degree in a related field.
- Management and fiscal/budgetary experience in higher education settings.
- Knowledge of CSU budget structure and related policies, state statutes, regulations, and codes, including the State Budget Act.
- Experience in enrollment management issues and the evaluation of programs and institutional effectiveness.
- Experience managing databases including building, maintaining or querying large relational databases such as Peoplesoft.

SPECIAL CONDITIONS:

- Must be willing to travel and attend training programs off-site for occasional professional development.
- Must be able to work additional hours, occasional holidays, and adjust working hours to meet special jobs. May be called back periodically to perform work as needed on an emergency basis.
- The person holding this position is considered a 'mandated reporter' under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.
- Must be able to successfully pass a pre-employment background/fingerprint check.
- This position classification has been defined as "Exempt" and is not subject to the overtime provisions of the Fair Labor Standards Act (FLSA).
- This position is a "designated position" in the California State University's Conflict of Interest Code. The successful candidate accepting this position is required to file Conflict of Interest forms subject to the regulations of the Fair Political Practices Commission.
- Full-time MPP employees are required to disclose outside employment at time of hire or within 30 days of taking additional outside employment subsequent to time of hire.