THE UNIVERSITY OF RHODE ISLAND

Position Description

TITLE: Associate Director, Budget & Financial Planning

DIVISION: Administration

REPORTS TO: Director, Budget & Financial Planning

GRADE: 16

SUPERVISES: Professional staff

BASIC FUNCTION:

Under the general direction of the Budget Director, assist in all aspects of managing the Budget & Financial Planning Office and managing the daily activities of the University budget, ensuring compliance with policies, procedures, regulations and statutes. Specifically responsible for working with the Provost’s Office in the development, coordination and monitoring of the University’s Budget. Responsible for the oversight of the PeopleSoft/Oracle Human Capital Management System as it relates to the budget and to position control.

DUTIES AND RESPONSIBILITIES:

Assist the Budget Director in managing and evaluating the overall planning and coordination of the Budget Office to ensure compliance with sound budgeting/accounting standards and practice, and with applicable policies, regulations and laws. May develop and institute fiscal or budgetary policy and procedure changes.

Assist in all aspects of administering, preparing, reviewing, monitoring, projecting, and allocating the Budget Request, the Budget Allocation and the Mid-year Budget. Assist in ensuring that the budget submissions reflect appropriately the University’s Strategic Plan. Maintain administrative control over the budget allotments and expenditures of the University’s budget for all non-research and non-profit funds.

Provide analyses, interpretation, assumptions, projections and presentations of financial data, including the budget submissions for executive management, the Board of Governors, and the State of Rhode Island.

Responsible for the oversight of the position control aspect of the Human Resource System, both legacy and new. Work with the e-Campus Human
Management Capital team to coordinate new processes and to recommend changes as appropriate.

Assist in aligning the budget with the strategic plan in developing the budget request and in developing multi-year budget projections.

Manage the day-to-day operations of the office, directing professional staff that are responsible for budgets, financial administration and the reporting of University funds; establish work priorities/workflow and resolve management or personnel issues. Provide training, support and guidance for office staff, and evaluate job performance.

Provide supervision and guidance to professional and clerical staff in the production, financial analysis, and communication of budget data and budget processes to the entire University by division, colleges and units, departments, fiscal staff and individuals.

Specifically responsible for working with the Provost’s Office in the development, coordination and monitoring of the University’s academic budget. Meet regularly with the Assistant Vice Provost to resolve various academic related financial issues that impact the University’s budget.

Serve as a member of the Budget Analysis Group, which meets to prepare financial analyses of the University’s financial position and to make recommendations which are then presented to the Vice President, Administration, to the President and senior staff.

Serve as a resource to budget staff, University departments and others in interpreting budgeting/accounting policies, regulations and state statutes. Respond to questions concerning State and University policies and procedures. Identify major areas of concern and make recommendations to alleviate any unfavorable outlook.

Regularly interact with personnel from the offices of: the Provost, the divisional Vice Presidents, Controller, Payroll, Human Resource Administration, Deans, and Office of Sponsored Programs concerning issues as they impact the University’s budget. Participate in decision-making with the Budget Director, the Vice President for Administration, and the President.

Serve as principal liaison with external budget personnel at the Office of Higher Education, the State Budget Office and both branches of state government, including coordinating with other University departments for information to complete the budget, and for information in response to requests from entities internal and external to the institution.

Identify and provide closure on financial issues, accounting/budget system issues, budget departmental issues, and University budget issues. Prepare and/or supervise the preparation of comprehensive reports and analyses as needed in decision making or to advise University offices.
OTHER DUTIES AND RESPONSIBILITIES:

Perform duties required in the absence of the Budget Director.

Maintain the legacy position control system.

Provide input for developing and/or revising related policies and procedures.

Provide leadership direction and training to other staff members.

Assume responsibilities for special projects as assigned by management.

Participate in meetings within and outside the University, e.g., Board of Governors’ meetings, Department of Higher Education and other higher education meetings, House and Senate hearings at the State House, etc.

As required, perform duties of Budget Specialist I, II and III, Financial Analysis.

Train new staff.

Assist with responses to ad hoc requests.

Provide recommendations to the Budget Director relative to improving office processes.

Perform additional duties as required.

LICENSES, TOOLS AND EQUIPMENT:

Personal computers, printers, calculators; word processing, spreadsheet and database software.

ENVIRONMENTAL CONDITIONS:

The incumbent is not substantially exposed to adverse environmental conditions.

QUALIFICATIONS:

Bachelor's degree required in business administration or similar field and seven to ten years of progressively responsible budget/financial experience, preferably in a public environment with a proven record of advanced financial skills. The following are required: Comprehensive knowledge of sound financial management and budgeting practices and principles; proven ability to work independently in analyzing and resolving complex financial problems; thorough knowledge of higher education, state, and federal regulations governing revenue, expenditures, bond funds, and debt service; ability to develop budgeting
policies and priorities within established guidelines and to manage and evaluate budget projects; demonstrated ability to supervise office staff and coordinate projects; knowledge of computer financial reporting systems and computer applications such as Microsoft Office; extensive experience with Excel; understanding and experience in administrative systems (e.g., PeopleSoft/Oracle); strong background in analytical mathematics; thorough knowledge of higher education, state and federal regulations governing revenue, expenditures, bond funds, and debt service; direct experience in computer-based financial management information systems, with an emphasis on budget application; excellent written and oral communication skills, with proven ability to effectively communicate with all levels of management, government and financial officials, and public constituents; strong interpersonal skills. Must be able to prepare and present detailed studies and reports and to make recommendations concerning their substance. Preferred: Master’s degree; minimum of ten (10) years of combined financial management/system experience in a complex environment, preferably in higher education.

ALL REQUIREMENTS ARE SUBJECT TO POSSIBLE MODIFICATION TO REASONABLY ACCOMMODATE INDIVIDUALS WITH DISABILITIES.