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Position #: (NUNC)... (NE)
Developed by:.....SG; CH
Reviewed by:.....LK; DLJ
Approved by:.....LK
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UNIVERSITY OF RHODE ISLAND

Position Description

TITLE: Coordinator, Financial Strategy & Planning
DIVISION: Administration and Finance (Financial Strategy & Planning)
REPORTS TO: Assistant Vice President, Financial Strategy & Planning
GRADE: 7
SUPERVISES: Student staff

BASIC FUNCTION:

Assist the Assistant Vice President (AVP) with the day-to-day administrative functions and running of the Office of Financial Strategy & Planning.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Assist the AVP with the various functions related to managing the Office of Financial Strategy & Planning (OFSP), including arranging and scheduling meetings, drafting, and maintaining routine correspondence, making travel arrangements, office calendar, etc.

Assist the AVP in the development and management of the University's budget process, including compiling the digital budget package for State or RI Office of Management & Budget, generating various reports from the PeopleSoft System, prepare and maintain spreadsheets, track and record receipt of information related to all budget cycles.

Under the direction of the AVP, prepare Power Point presentations and other reports using Excel or Google Sheets.

Collaborate with OFSP staff for efficiencies, improving business and data processes, serving the community, and developing new initiatives.

Reconcile OFSP budget to accounting records.

Assist in the preparation of budget data for the URI Board of Trustees, Executive and Legislative branches of State government, for senior management, and for various committees and/or councils as required. This may include taking electronic minutes at various meetings.

Prepare and process both routine and important/complex correspondence.

Confidentially handle information of a sensitive nature.

Responsible for obtaining information and recommendations relating to specific topics, activities, procedures, meetings, and decision making while collaborating with staff in various offices across campus, including President's Office, Vice President's Offices, Dean's Offices, etc.

Maintain OFSP daily and internal/external annual calendars.

Responsible for office requisitions, purchase orders, multi-year blanket orders, payment of OFSP invoices. Assist office leadership with the department's budget. Monitor expenses and initiate transfers when needed.

Assist with the review and execution budget transfers that are submitted by the University community.

Serve as back-up for bi-weekly payroll forms.

Oversee the flow of documents via Adobe Sign and oversee workflow changes.

Responsible for updating material and posting material to the OFSP Website.

Input into PeopleSoft system to hire students, graduate students, and internal payroll employees; approve student hours. Access and monitor, as needed, PeopleSoft Financial and HCM information.

Interview and recommend for appointment student help within OFSP. Train, schedule, and assign workloads to student help.

OTHER DUTIES AND RESPONSIBILITIES:

Serve as facilitator for incoming requests from internal and external entities.

Serve as assistant to both the AVP and the Associate Director and Assistant Director for various reports and *ad hoc* projects.

Perform other duties as assigned.

LICENSES, TOOLS, AND EQUIPMENT:

Personal computers, printers; Microsoft Office products, particularly Word, Excel, PowerPoint, Adobe Acrobat. Adobe Sign. Wordpress Web Design software.

ENVIRONMENTAL CONDITIONS:

This position is not substantially exposed to adverse environmental conditions.

QUALIFICATIONS:

REQUIRED: Associate's degree; Minimum of three years' experience in a staff support position in a complex environment; Demonstrated computer skills (including Microsoft Office (particularly Excel, PowerPoint, and Word), scheduling software, and Webex, Zoom or MS Teams)); Demonstrated understanding of budgetary concepts; Demonstrated mathematical, problem-solving, and analytical skills; Demonstrated strong interpersonal and verbal communication skills; Demonstrated proficiency in written communication skills; Demonstrated ability to coordinate complex office management tasks; Demonstrated ability to work independently; Demonstrated ability to balance multiple priorities;

Demonstrated ability to maintain confidentiality; and, Demonstrated ability to work with diverse groups/populations.

PREFERRED: Bachelor's degree; Demonstrated experience in a financial setting; Demonstrated experience with financial and Human Resource systems (e.g., Oracle, PeopleSoft); Demonstrated experience with Adobe Sign; Demonstrated Wordpress Web Design experience; Demonstrated work experience in an educational system; Demonstrated supervisory experience; and, Demonstrated ability to train staff.

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