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Developed by:.....LB
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THE UNIVERSITY OF RHODE ISLAND

Position Description

TITLE: Assistant Director, Financial Strategy & Planning
DIVISION: Academic Affairs and Administration and Finance (Office of Financial Strategy & Planning)
REPORTS TO: Director, Financial Strategy & Planning
GRADE: 16
SUPERVISES: System Administrator and Functional Analyst, Support staff, Analysts, students

BASIC FUNCTION:

Directly responsible for overseeing all aspects of the PBCS budget system, including accurate and timely preparation, annual training, and ensuring that budgets are available to the colleges/areas each year. Perform complex and comprehensive work including forecasting, research analysis, trend analysis, financial modeling, PS query management and report writing related to budget preparation and submission. Provide analytical counsel and support for special projects to senior management, the Strategic Budget and Planning Council (SBPC), the RI Council on Postsecondary Education, and the Executive and Legislative branches of RI State Government. Provide ongoing support to the Deans, Directors college administrators and professional staff. Participate in the compilation, control, and monitoring of the University's budgets. Prepare and analyze reports on complex project components of the University's budget. Responsible for all revenue projections related to enrollment, course fees, Athletics, and other revenue. Track expenditures and/or revenues and perform post-audit and other reviews of actual expenditures and/or revenues. Research, develop, evaluate, and formulate modifications and improvements to budgeting policies and financial procedures. Independently evaluate and review complex technical information and prepare comprehensive analyses, plans, and reports on components of the University's budget.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Supervise the System Administrator and Functional Analyst to ensure system is functioning at maximum capacity, timely and accurate budget allocations are made available at the appropriate time to colleges/areas, security access is updated as required and appropriate communications are prepared.

Provide leadership and direction for the PBCS Administrator, support staff in the Office of Financial Strategy & Planning to enhance performance, quality, and productivity, educate and ensure these staff are properly trained.

Oversee development of training manuals and provide campus-wide training to the University's financial community with regard to the University's budgeting process, procedures, and regulations.

Responsible for developing PeopleSoft queries to assist in data gathering and processing, and to respond to *ad hoc* requests from management.

Undertake a variety of technical tasks in support of PeopleSoft Financials; for example, participate in upgrades and associated testing, and engage in the continuing review, definition, and analyses of functional needs, requirements, and business rules and processes associated with the Office of Financial Strategy & Planning, which might result in the need for system enhancements or modifications.

Actively partner with the Financial Lab, IT, HR, and external consultants to troubleshoot issues, test, and implement software changes, upgrades, and enhancements.

Perform fit/gap analysis to evaluate the system capabilities of PBCS and how they relate to PeopleSoft Financials to ensure they match business requirements, assess how requirements will be implemented and identify changes to the systems or business practices.

Independently evaluate and review complex technical information and prepare comprehensive analyses, plans, and reports on components of the University's budget.

Ensure the tuition and fee rates reflected in the budget request is consistent with guidelines that are received from the Council on Postsecondary Education.

Responsible for the accurate preparation, review and finalization of all items related to tuition and fees and enrollment.

Provide recommendations and guidance and communicate with the Provost Office on all enrollment projections and discussion of tuition and fee rates. Communicate with fee areas on campus relative to revenue and expense budgets.

Develop and implement analytical approaches to decision-making for critical budget proposals at the University level. Assemble and effectively present information in order to assist in decision-making (e.g., development of rubrics to be used by SBPC, analysis and presentation of survey results in various formats, etc.). Design alternative financial support systems for the University. Perform cost analyses. Participate in, coordinate, and assume responsibilities for multiple special, complex, and confidential projects as assigned by the Director.

Research, analyze and prepare *ad-hoc* analyses/reports, and provide information to senior management, the SBPC, the RI Council on Postsecondary Education, and the Executive and Legislative branches of RI State Government as required.

Provide short- and long-term forecasting, identifying areas of concern and recommending actions to alleviate potential adverse issues. Provide recommendations to be used in final decision-making.

Serve as a liaison and resource in the following capacities: 1) work as liaison and resource to campus community to assess and develop budget reporting needs; 2) serve as liaison and advisor to senior management, University departments and administrators, ensuring adherence to established State, University, and other governing agencies' financial and position control policies/procedures;

3) as necessary, serve as liaison to the SBPC, the RI Council on Postsecondary Education, and the Executive and Legislative branches of RI State Government.

Research, compile, maintain, review, and revise annual reports for senior management and the RI Council on Postsecondary Education. Participate in the cross-organizational review, definition, and analysis of functional needs, data requirements and sharing procedures. Provide University Computing Systems (UCS) with information regarding decisions, policies, etc., impacting budget management systems.

Develop and implement new University-wide reporting protocols and analytical tools.

Participate on various University committees and provide related budgetary, analytical, and technical support.

Remain current on new legislation and State Budget Office requirements impacting the Office of Financial Strategy & Planning.

Represent the Director or Associate Director as required.

OTHER DUTIES AND RESPONSIBILITIES:

Recommend and develop improvements that will enhance the operations efficiency of the Office of Financial Strategy & Planning function and the University.

LICENSES, TOOLS, AND EQUIPMENT:

Personal computers, printers; Excel; word processing, database management, query, and spreadsheet software.

ENVIRONMENTAL CONDITIONS:

The incumbent is not substantially exposed to adverse environmental conditions.

QUALIFICATIONS:

REQUIRED: Master's degree in finance, economics, math, statistics, management, public administration, or related field, with a minimum five years of demonstrated successful professional experience in financial management in a complex organization (including, but not limited to, tracking and analyzing revenue and expenditure budgets and actual data), **OR** a Bachelor's degree with a major/focus in finance, economics, math, statistics, management, public administration, or related field with equivalent related quantitative knowledge and skills, with a minimum of seven years of demonstrated successful professional experience in financial management in a complex organization, (including, but not limited to, tracking and analyzing revenue and expenditure budgets and actual data in a higher education institution or equivalent organization/industry); Demonstrated knowledge of state government and higher education operations, policies, and procedures; Demonstrated experience with personal computers, including spreadsheet applications; Demonstrated advanced knowledge of Microsoft Excel functions, such as pivot tables, v-lookups, and macro development; Demonstrated experience with enterprise resource planning systems (e.g., Oracle, PeopleSoft, Banner); Demonstrated experience using the PBCS Oracle budget system; Demonstrated experience in the operations of the PBCS Oracle budget system; Demonstrated technical ability to react to complex *ad-hoc* requests;

Demonstrated ability to provide clear and concise reports on a timely basis; Demonstrated strong verbal and interpersonal communication skills; Demonstrated proficiency in written communication skills; Demonstrated ability to work independently; Demonstrated ability to be detail-oriented; Demonstrated presentation skills; Demonstrated ability to be flexible; Demonstrated ability to manage multiple projects simultaneously in a fast-paced work setting; and, Demonstrated ability to work with diverse groups/populations.

PREFERRED: Demonstrated analytical and problem-solving skills, including the development of complex financial models; Demonstrated knowledge of economic forecasting and simulation methods, econometric and statistical modeling, and data interpretation and processing; Demonstrated experience using the student, human resources, and grant modules of enterprise resource planning systems (e.g., Oracle, PeopleSoft, Banner); Demonstrated experience using statistical software (e.g., SAS, SPSS); Demonstrated experience using predictive modeling; Demonstrated skills in Access; Demonstrated skills in Oracle Budgeting System (PBCS) and, Demonstrated experience using the financial module of an enterprise resource planning systems (e.g., Oracle, PeopleSoft, Banner).

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