

JOB INFORMATION

Job Code	KA60
Job Description Title	Asst Dir, Budget & Planning Services
Pay Grade	FO13
Range Minimum	\$85,560
33rd %	\$108,380
Range Midpoint	\$119,790
67th %	\$131,200
Range Maximum	\$154,020
Exemption Status	Exempt
Organizational use restricted to the following divisions	112 AVP, Budgets & Business Operations
Approved Date:	5/5/2026 3:54:57 PM

JOB FAMILY AND FUNCTION

Job Family:	Financial & Business Operations
Job Function:	Accounting & Finance

JOB SUMMARY

Leads the annual budget development process, assists in institutional financial planning processes, and provides reporting to campus leaders for decision-making in the Budget & Planning Services (BPS) office.

RESPONSIBILITIES

- Assists the Director in the management of the annual budget process, including leading discussions with campus personnel on budget guidelines, providing guidance to personnel on campus on budget and financial matters, and holding ad hoc meetings to refresh the campus on budget processes.
- Leads all educational efforts for BPS, including providing ad hoc presentations on matters of importance.
- Assists in the preparation, analysis, and review of quarterly management statements and reporting.
- Coordinates and assigns all state reporting, including, but not limited to, the Legislative Budget Request, the Postsecondary Operations Plan, the Quality Performance Report, and any ad hoc requests.
- Oversees monthly accounting under the Strategic Budgeting Initiative.
- Guides other full-time staff as needed and serves as a point of contact in the Director's absence.
- Develops and maintains relationships with campus financial personnel to assess reporting and other needs. Assigns Budget & Planning Services (BPS) personnel to work with various units on campus to provide continuity and consistency.
- Supports the Director with the strategic direction of the planning and budgeting software by advising on enhancements and seeking opportunities for new use cases.

The responsibilities listed above show the typical duties for jobs in this classification. Actual tasks may differ depending on the department's needs. Other similar duties may be assigned with discretion of the supervisor. Not every duty will apply to every position, and the amount of time spent on each task can change based on department needs.

SUPERVISORY RESPONSIBILITIES

Supervisory Responsibility	May be responsible for training, assisting or assigning tasks to others. May provide input to performance reviews of other employees.
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MINIMUM QUALIFICATIONS

To be eligible, an individual must meet all minimum requirements which are representative of the knowledge, skills, and abilities typically expected to be successful in the role. For education and experience, minimum

requirements are listed on the top row below. If substitutions are available, they will be listed on subsequent rows and may only be utilized when the candidate does not meet the minimum requirements.

MINIMUM EDUCATION & EXPERIENCE

Education Level	Focus of Education		Years of Experience	Focus of Experience	
Bachelor's Degree	no specific discipline A degree in Accounting, Finance, Business, Data Analytics, Statistics, or related field is desired.	and	6 years of	experience in budget and financial planning and analysis for a large, complex organization.	

MINIMUM KNOWLEDGE, SKILLS, & ABILITIES

Knowledge of generally accepted accounting practices and principles.	
Ability to analyze financial data, knowledge, and demonstration of best practices in budgeting and financial planning.	
Critical thinking skills to identify strengths and weaknesses of alternative solutions, conclusions, or approaches to problems.	
Ability to learn, navigate, and administer budget and long-term financial planning software.	

MINIMUM LICENSES & CERTIFICATIONS

Licenses/Certifications	Licenses/Certification Details	Time Frame	Required/Desired	
Certified Public Accountant (CPA)		Upon Hire	Desired	
Chartered Financial Analyst (CFA)		Upon Hire	Desired	
Certified Management Accountant (CMA)		Upon Hire	Desired	

REQUIRED PRE-EMPLOYMENT/ONGOING SCREENINGS

Financial History Check

PHYSICAL DEMANDS & WORKING CONDITIONS

Physical Demands Category:	Office and Administrative Support
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PHYSICAL DEMANDS

Physical Demand	Never	Rarely	Occasionally	Frequently	Constantly	Weight
Standing			X			
Walking			X			
Sitting				X		
Lifting	X					
Climbing		X				
Stooping/ Kneeling/ Crouching		X				
Reaching				X		
Talking				X		
Hearing				X		
Repetitive Motions				X		
Eye/Hand/Foot Coordination				X		

WORKING ENVIRONMENT

Working Condition	Never	Rarely	Occasionally	Frequently	Constantly
Extreme temperatures		X			
Hazards		X			
Wet and/or humid		X			
Noise		X			
Chemical		X			
Dusts		X			
Poor ventilation		X			

Vision Requirements:
Ability to see information in print and/or electronically.