

JOB INFORMATION

Job Code	KA61
Job Description Title	Dir, Budget & Planning Services
Pay Grade	FO15
Range Minimum	\$109,260
33rd %	\$142,030
Range Midpoint	\$158,420
67th %	\$174,810
Range Maximum	\$207,590
Exemption Status	Exempt
Organizational use restricted to the following divisions	112 AVP, Budgets & Business Operations
Approved Date:	5/5/2026 3:55:54 PM

JOB FAMILY AND FUNCTION

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

JOB SUMMARY

Provides overall leadership for the annual budget development process, leads institutional financial planning efforts, and delivers strategic financial reporting to campus leadership to support decision-making.

RESPONSIBILITIES

- Manages the annual budget process by developing timelines, assisting in budget guideline development, assessment of efficiencies and process improvements, and maintaining budget systems. - Serves as the strategist for the university's planning and budgeting software. This includes mapping out use cases to solve institutional challenges as well as providing end-user support while working with other personnel to build models under the connected planning concept. - Collaborates with the AVP, Budgets & Business Operations in developing and updating short- and long-term financial models to perform revenue and expense forecasting to support the goals and strategic plan of the University. - Prepares, analyzes, and reviews quarterly management statements and reporting under the Strategic Budgeting Initiative, as well as identifies opportunities for improvement in reporting. - Directly supervises staff. - Reviews all state reporting requirements and ensures accurate and timely completion of forms. - Assists AVP, Budgets & Business Operations in the development of presentations and reports for communicating budget and other financial information. - Collaborates with other business and auxiliary units on campus to build pro-formas that will include preparing ROI analyses and identify key performance indicators to assess sustainability success.

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	Full supervisory responsibility for other employees is a major responsibility and includes training, evaluating, and making or recommending pay, promotion or other employment decisions.
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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	8 years of	experience in reporting, financial analysis, and budgeting 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	
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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.