UNIVERSITY OF SOUTHERN CALIFORNIA
Associate University Budget Director
Job Code: 113547

OT Eligible: No
Comp Approval: 12/8/2016

JOB DESCRIPTION:

Directs and oversees the compilation and preparation of the University's annual operating budget submissions. Participates in short and long-range fiscal planning and goal setting for the University, and strategic planning projects with University-wide implications. Directs the design, implementation, and support of budget management and reporting systems, and related policies and processes used to formulate the University-wide annual operating budget. Oversees the budget preparation activities of senior business officers across the University, during the annual budget cycle. Oversees, through facilities managers, the administrative operation of the USC satellite campuses in Irvine (Orange County Center) and Sacramento (State Capital Center). Reports to Associate Vice President, Executive Director of Budget.

JOB ACCOUNTABILITIES:

*E/M/NA % TIME

Directs and oversees the compilation and preparation of the University's annual operating budget submissions. Identifies strengths and/or weaknesses in budget plan and course(s) of action to be considered to resolve issues. Summarizes results for presentation to senior university administrators. Works directly with the senior business officers of school, auxiliary, and administrative units in preparation of the annual operating budget. Maintains close, supportive working relationships with the university's deans, associate deans, senior business officers and central administrative offices.

Identifies budget trends and implications of those trends on university operations such as analyzing historical trends in undergraduate tuition units, by school, utilizing import/export tuition data related to major degrees of study.

Provides budget recommendations to respond to a wide range of issues. Develops, formulates, and recommends solutions to address complex issues and concerns that may arise in the area of resource allocations and policies. Resolves problems and questions referred by school, auxiliary and administrative unit managers.

Serves as a technical expert on university budget methodologies, such as Allocated Central Costs (ACC’s), facilities charges, tuition distribution, employee benefits rates, etc. Provides leadership, guidance, direction, advice and technical expertise to senior business officers, senior administrators and other university administrators across the university in the preparation of separate operating budgets annually and special requests.

Directly supervises all assigned subordinate staff. Recruits, screens, hires, and trains staff. Evaluates employee performance and provides guidance and feedback to assigned staff. Counsels, disciplines and/or terminates employees as required.
Participants in developing, implementing, documenting, and communicating financial and budgetary policies and procedures with university-wide application as well as internal operating policies, procedures, processes and guidelines. Provides policy and regulatory interpretations as necessary. Ensures school and administrative division compliance with policies and procedures.

Manages highly complex financial reporting, data collection and advanced analysis with university-wide implications. Oversees development of research and data analysis, including conclusions and recommendations that guide results format. Makes final presentations to senior administrators.

Provides leadership and oversight for the design, implementation, and support of budget management and reporting systems, and related policies and processes used to formulate the university-wide annual operating budget. Oversees, in conjunction with the Associate Director, Information Management, the system(s) used to collect and disseminate budget data within the university community. Proposes and implements system enhancements utilizing current technology to meet university business needs.

Participates in short and long-range fiscal planning and goal setting for the university, and strategic planning projects with university-wide implications. Plans and schedules distribution of the three-year forecast budgets and pro-forma budgets to university operating units.

Prepares analyses for use by campus administrators when making academic planning, budget, and other presentations. Identifies relevant and usable data sources, selecting appropriate methods of data collection and data analysis, and reporting of conclusions, implications, and recommendations.

Prepares, in collaboration with the university Budget Director, reports for university trustees and senior administration. Plans a schedule to meet deadlines for submission of reports for Board of Trustee quarterly meetings or other committee meetings.

Oversees, through subordinate facilities managers, the administrative staff in the Orange County Center and State Capitol Center. Provides leadership and guidance in regards to the administrative operation of the centers including security matters and the safety of faculty, staff, students and other visitors to the centers.

Maintains professional currency through active participation and leadership in associations and committees both internal and external to the university. Represents the department on formal university committees.

Participates in the leadership of the Office of Budget and Planning and represents the office and the university when the university Budget Director is unavailable.

Develops and implements security related procedures such as office opening and closing routines, recognition of duress signals and key controls. Coordinates security activities with Department of Public Safety. Promotes and maintains standards for security conscious awareness and behavior. Maintains knowledge of University’s crime prevention and suppression programs and services. Ensures dissemination of security related information to staff.

Performs other related duties as assigned or requested. The university reserves the right to add or change duties at any time.

*Select E (ESSENTIAL), M (MARGINAL) or NA (NON-APPLICABLE) to denote importance of each job function to position.

**EMERGENCY RESPONSE/RECOVERY:**

Essential: [ ] No
Yes  In the event of an emergency, the employee holding this position is required to “report to duty” in accordance with the university’s Emergency Operations Plan and/or the employee’s department’s emergency response and/or recovery plans. Familiarity with those plans and regular training to implement those plans is required. During or immediately following an emergency, the employee will be notified to assist in the emergency response efforts, and mobilize other staff members if needed.

**JOB QUALIFICATIONS:**

**Minimum Education:**

Bachelor’s degree

**Minimum Experience:**

7 years

**Minimum Field of Expertise:**

Degree in Business/Accounting; Public Administration; Economics, or Mathematics. Financial and budget planning experience. Requires a solid understanding of budget planning in a decentralized environment. Demonstrated skill in quantitative financial analysis and budgetary control, with thorough working knowledge of general accounting principles and practices, with an emphasis on fund accounting and University financial accounting. Advanced analytical, evaluative, objective critical thinking and problem-solving skills required. Ability to prepare complex and detailed financial and budgetary analyses and reports. Demonstrated interpersonal skills and ability to deal credibly and effectively with senior leadership.

**Preferred Education:**

Master’s degree

**Preferred Field of Expertise:**

In-depth knowledge of financial planning and budget management principles, and an excellent understanding of generally accepted accounting principles.

**Skills: Other:**

- Analysis
- Assessment/evaluation
- Budget control
- Budget development
- Communication -- written and oral skills
- Conceptualization and design
- Conflict resolution
- Counseling
- Interpretation of policies/analyses/trends/etc.
- Interviewing
- Knowledge of applicable laws/policies/principles/etc.
- Managerial skills
- Networking
- Organization
- Planning
Problem identification and resolution
Project management
Public speaking/presentations
Research
Scheduling
Staff development
Statistical analysis
Teaching/training

**Skills: Machine/Equipment:**

- Calculator
- Computer network (department or school)
- Computer network (university)
- Computer peripheral equipment
- Fax
- Personal computer
- Photocopier

**Supervises: Level:**

Manages through subordinate supervisors.

**Supervises: Nature of Work:**

- Administrative
- Professional/Paraprofessional

**SIGNATURES:**

Employee: ___________________________ Date: ___________________________

Supervisor: ___________________________ Date: ___________________________

The above statements are intended to describe the general nature and level of work being performed. They are not intended to be construed as an exhaustive list of all responsibilities, duties and skills required of personnel so classified.

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