



JOB INFORMATION

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| <i>Job Code:</i> | 113548 |
| <i>Job Title:</i> | Executive Director, Budget |
| <i>FLSA Status:</i> | Exempt |
| <i>Supervisory:</i> | Manages employees (varied levels) across departments on a project basis.; Manages through multiple layers of subordinate supervisors. |
| <i>Job Family:</i> | Budget/Business Analysis |
| <i>Job Family Group:</i> | Accounting, Finance and Banking |
| <i>Management Level:</i> | 4 Administrator |

JOB SUMMARY

Responsible for providing strategic leadership and direction in the planning and development of several university finance areas, according to the finance vice president's broad, administrative direction. Consolidates university budget, and approves and monitors capital plan expenditures. Oversees university taxation modeling and implementation, long-term cash forecasting, and the review, design, and implementation of budget and finance systems. Conducts annual budget hearings with all university schools and major administrative areas.

JOB QUALIFICATIONS:

Education

| <i>Req</i> | <i>Pref</i> | <i>Degree</i> | <i>Field of Study</i> | |
|------------|-------------|-------------------|-------------------------|----|
| X | | Bachelor's degree | Business Administration | Or |
| X | | Bachelor's degree | Finance | Or |
| X | | Bachelor's degree | Economics | Or |
| X | | Bachelor's degree | Accounting | Or |
| X | | Bachelor's degree | in related field(s) | |
| | X | Master's degree | Business Administration | Or |
| | X | Master's degree | Economics | Or |
| | X | Master's degree | Finance | Or |
| | X | Master's degree | Accounting | Or |
| | X | Master's degree | in related field(s) | |

Additional Education

Check here if experience may substitute for some of the above education.

Combined experience/education as substitute for minimum education

Work Experience

| <i>Req</i> | <i>Pref</i> | <i>Work Experience</i> | <i>Experience Level</i> | |
|------------|-------------|------------------------|--|--|
| X | | 10 years | of experience in budgeting, financial analysis, and reporting. | |
| | X | 15 years | of experience with financial planning concepts. | |

Additional Work Experience

Check here if education may substitute for some of the above work experience.

Combined experience/education as substitute for minimum work experience

Knowledge, Skills and Abilities

| Req | Pref | Functional Skills |
|-----|------|---|
| X | | Experience with higher education financial policies, procedures, and systems. |
| X | | Proven experience in a leadership and/or management role, embedding organizational values and behaviors (e.g., ethics, accountability). |
| X | | Demonstrated experience with government and/or fund accounting, computer simulation and forecasting techniques, and generally accepted accounting principles and practices. |
| X | | Proven ability to interpret, conceptualize, provide clarity, and resolve complex financial data, problems, and policies. |
| X | | Excellent analytical, qualitative, and data organization skills. |
| X | | Demonstrated experience fostering inclusive environments and a sense of belonging and appreciation for team members that drives best-in-class customer service. |
| X | | Proven communication (written and oral) and interpersonal skills, able to create cultures of trust and transparency while building strong relationships with customers, partners, and stakeholders. |
| X | | Experience presenting technical topics to non-technical audiences, and providing both detailed information and summaries to management-level individuals and groups. |
| | X | Experience with USC financial policies, procedures, and systems. |
| | X | Thorough knowledge of local, state, and federal policies and procedures pertaining to budget, travel, accounts payable, procurement, payroll, and personnel. |
| | X | Experience with ERP, financial reporting, and human resources systems (e.g., Workday, Quali, Gateway, TEV, UCPath KRONOS, Data Warehouse). |

Other Job Factors

JOB ACCOUNTABILITIES

| | % Time | Essential | Marginal | N/A |
|--|--------|-----------|----------|-----|
| Establishes university budget parameters, incorporating senior administration and university priorities. Directs and coordinates with the associate university budget director, preparing the budget system and accommodating all relevant data to produce a consolidated budget. Conducts appropriate budget-related meetings with senior vice presidents, vice provosts, vice presidents, and senior business officers. Ensures proper preparation, communication, evaluation and accordance testing of all school, healthcare, research, and administrative budgets. Reviews all budgets for technical soundness, adherence to university guidelines, and financial integrity. Reviews and presents consolidated budget to relevant stakeholders (e.g., finance vice president, senior vice presidents, chief financial officer). Monitors in-year budget execution, and serves as a resource for unit queries and requests for financial analysis assistance. Owns the university administrative cost allocation process, as well as all other university "taxation" matters imposed on all revenue centers. | | | | |
| Works with staff to report all expenditures contained in the annual capital plan, supporting the forecasting resources needed for plan implementation. Reviews all capital plan budgets, confirming proper budget resources are identified. Conducts monthly meetings with financial stakeholders, ensuring completeness of information and spending patterns. Oversees preparation of the capital plan report for the finance vice president. | | | | |
| Represents the budget and planning function in university-level initiatives of a financial nature. Collaborates with relevant stakeholders to evaluate, design, and implement various finance systems. Prepares and presents the Responsibility Center Management taxation modeling to senior administration. Monitors collection and deployment of all university taxes to fund appropriate initiatives. | | | | |
| Conducts annual budget hearings with all university schools and major administrative areas. Works with appropriate budget and treasury staff, monitoring and projecting long-range working capital balances, and helping | | | | |

JOB ACCOUNTABILITIES

| | <i>% Time</i> | <i>Essential</i> | <i>Marginal</i> | <i>N/A</i> |
|--|---------------|------------------|-----------------|------------|
| coordinate working capital requirements. Prepares reports for the finance vice president regarding projected balances and working capital future demands. | | | | |
| Participates in short- and long-range university fiscal planning and goal setting, and coordinates financial reviews of units in fiscal distress. Prepares ad hoc reports and analysis for the finance vice president and other senior administrators. Accountable for team development, helping staff and partners set and achieve career-growth goals. | | | | |
| Represents the Office of Budget and Planning and the finance vice president in meetings relating to university budgetary matters (e.g., governance boards, councils) so as to understand current and future business needs and ensure consistent, reliable services. | | | | |

Other Requirements

| <i>Essential:</i> | <i>Emergency Response/Recovery</i> | <i>Essential:</i> | <i>Mandated Reporter</i> |
|--|--|-------------------|---|
| | 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. | | A mandated reporter who in his or her professional capacity has knowledge of, or reasonably suspects a person who is under the age of 18 years, elderly, or a dependent adult has been the victim of abuse or neglect must report the suspected incident. The reporter must contact a designated agency immediately or as soon as practically possible by telephone or in writing within 36 hours. By virtue of the associated job duties, this position qualifies as a mandated reporter as required by state law and USC’s policy at: https://policy.usc.edu/mandated-reporters/ |
| <i>Campus Security Authority (CSA)</i> | | | <i>Essential:</i> |
| By virtue of the associated job duties, this position qualifies as a Campus Security Authority as required by law and USC’s policy at: https://dps.usc.edu/alerts/clery/ | | | No |

ACKNOWLEDGMENTS

The above statements reflect the essential and non-essential functions as necessary to describe the principle contents of the job. They are not intended to be a complete statement of all work requirements or duties that may be required of the position. I understand that I may be asked to perform other duties as assigned. USC reserves the right to add or change duties at any time.

The University of Southern California is an Equal Opportunity Employer. USC prohibits discrimination on any basis protected under federal, state, or local law, regulation, or ordinance or university policies. All employment decisions are based on individual qualifications and business need.

I acknowledge receipt of this job description and its associated physical requirements. I have read and understand the job description and job requirements and agree to abide by their contents. I realize that duties may be requested of me that are not specifically stated herein. I understand that I will be expected to adjust to potential fluctuations in work volume. I understand that, if I have any questions about the essential functions or expectations of my position, my supervisor and/or HR partner are available to discuss them with me.

Print Employee Name

Signature

Date

Print Manager Name

Signature

Date

This job description describes the general nature and level of work required by the position. It is not intended to be an all-inclusive list of qualifications, skills, duties, responsibilities or working conditions of the job. The job description is subject to change with or without notice, and Management reserves the right to add, modify or remove any qualification or duty. Nothing in this job description changes the existing at-will employment relationship between the university and the employee occupying the position.