

Sam Houston State University Human Resources

Staff Classification Description – Executive Director of Budget & Financial Planning

Skill Category: Executive/Administrative

Position (Employee) Class: 1M180 (E1)

Grade: NC

Date: 08/2023

Department: Division of Finance and Operations

Educational & Experience Requirement: Bachelor's degree in finance, accounting, statistics, or related discipline; preferred Master's degree in finance, accounting or business administration or related discipline. Eight years of relevant professional work experience in accounting, budget or finance required, ten years preferred. Two years of management/supervisory experience with the ability to lead employees through changes/business process improvements. Success in leveraging the use of technology and improving business practices. Experience developing advanced business and financial models. A combination of education, experience, and training that would produce the required knowledge and abilities could be considered.

Nature & Purpose of Position: Performs complex and highly advanced work assisting in the direction and guidance of strategic operations and planning for multiple departments in the division. Responsible for budget planning, development and maintenance of the university Operating Budget. Work closely with the CFO and Senior VP for Operations, Cabinet members, College Administrators, and staff to ensure institutional financial planning, resources allocation, and business operations.

Supervision Given & Received: Receives minimum direction from the CFO & Sr VP for Operations. Supervises professional staff as assigned. Performance is based on the effective operation of the administrative function.

Primary Responsibilities: Oversees in the development and submission of the university's annual Operating Budget as required by Texas State University System, Board of Regents' Rules and applicable state law. Provides leadership to the Sr. Director of Financial Planning and Budget, and guidance to college/division staff related to budget and financial planning. Works with complex data sets and analytics tools in support of the university strategic plan, multiyear financial plan, and key performance metrics. Develops advanced business and financial models. Assists in the coordination and implementation of new technology and/or technology enhancements to improve business processes. Analyzes budget changes to assure budgets reconcile to approved increase/decrease and result in a balanced budget. Analyzes financial data and develops moderately complex reports for forecasting and analysis. Serves as the secondary contact working with the staff of the Legislative Budget Board, and Texas State University System Office. Prepares regular and non-scheduled reports. Advises Division and/or College leadership about budget matters. Ensures compliance with all relevant state, federal, local, university and other related rules and regulations. May oversee provision of contracted budget and financial planning services to TSUS component institutions. Performs other related duties as assigned.

Other Specifications: Excellent financial analysis, financial modeling, and technology skills to develop solutions and recommendations; familiarity with budget models. Strong communication and presentation skills, including the ability to explain complex financial information to various employees at different levels with varying degrees of financial knowledge. Knowledge of strategic planning and budget. Ability to integrate complex operational and financial considerations using critical thinking. Demonstrated ability to coordinate, facilitate, and chair meetings for the purpose of resolving differences and working toward institutional goals. Develops collaborative relationships with Finance and Operations senior staff and college/division staff. Excellent organizational skills in identifying and prioritizing work activities. Knowledge and understanding of budget planning tool and ERP Budget Model to enhance operational effectiveness. Ability to use independent judgement. This position may be designated as a Campus Security Authority (CSA).

This is a classification description with the complete list of job duties being maintained at the departmental level. Other job duties necessary for the effective operation of the University are expected to be performed. Any qualifications to be considered as equivalents in lieu of stated minimums require the prior approval of Human Resources.

Sam Houston State University is an at will employer and drug free/smoke free workplace. All positions at Sam Houston State University are considered security sensitive requiring background checks in accordance with education code 51.215, and drug testing as required by D.O.T. for safety sensitive positions. The pay grade range is inclusive of social security benefit replacement pay.

