



TEXAS WOMAN'S
UNIVERSITY™

DATE ISSUED: 06/16
FLSA: Exempt
PTO: VCS

JOB DESCRIPTION

TITLE

Director, Budget & Analysis

JOB SUMMARY

Performs complex and highly responsible job duties related to the preparation, maintenance, and control of the institutional operating budget. Oversees the design and implementation of budget enhancements within the Oracle Budget Module. Analyzes and prepares accurate financial data and reports to the Board of Regents, University administration, department managers, and state agencies. Work is performed under limited supervision with broad latitude for initiative and independent judgment and performance evaluation is based on the effective operation of the administrative function. The performance evaluation is conducted through the performance evaluation system and in accordance with the University Policies & Procedures.

ORGANIZATIONAL RELATIONSHIPS

Reports to: Associate Vice President, Finance and Administration

Supervises: Senior Financial Analyst

ESSENTIAL DUTIES - May include, but not limited to the following:

- Responsible for the preparation, maintenance, and administration of the University's annual operating budget.
- Responsible for the design, implementation, and enhancement of the Oracle Budget Module.
- Establishes budgetary controls, monitors budgetary approvals and processes related transactions in the Oracle Financial System.
- Ensures employee positions are adequately funded and supported in the Oracle Budget Module.
- Ensures compliance with applicable TWU policies, state and federal guidelines and statutes.
- Analyzes and prepares financial data for TWU administration and departments.
- Analyzes revenue and expense accounts for variances.

- Assists administrative and academic departments with establishing and maintaining operating budgets, providing guidance and recommendations for budget management.
- Responsible for the processing and management of annual carryforward balances.
- Manages the quarterly allocation of Indirect Cost funds.
- Manages the monthly Auto Budget Process.
- Performs semi-annual calculation of insurance premiums and allocates expenses to appropriate departments.
- Analyzes and reviews capital projects, in cooperation with Facilities Management, to close accounts when completed and return unused funds to original source.
- Assists in the organization, training, and management of the Budget Link Team which consists of University-wide representatives.
- Formulates procedures and operating policies within area of responsibility.
- Serves on the Student Service Fee Allocation Committee and prepares financial data and models for the committee members.
- Assists with compilation and preparation of reports to the Texas Higher Education Coordinating Board, the Legislative Budget Board, the Governor's Office of Budget and Planning, other state agencies, TWU Board of Regents, and University Administration.
- Performs ABEST/USAS reconciliation.
- Provides direct support in compilation of data, review and submission of the biannual Legislative Appropriations Request.
- Provides guidance and supervision, and assigns job tasks to subordinates.
- Responsible for establishing job standards for subordinate staff and effectively evaluating staff under charge. The performance evaluation is conducted through the performance evaluation system and in accordance with the University Policies & Procedures.

ADDITIONAL DUTIES

- Performs other duties as requested.

EDUCATION

Bachelor's degree in accounting or related field.

EXPERIENCE

Five years of progressively responsible experience in budget preparation and/or fiscal management. Experience in higher education preferred.

REQUIREMENT

Regular and reliable attendance at the University during regular scheduled days and work hours is an essential function of this position.

KNOWLEDGE, SKILLS, AND ABILITIES - The following are essential:

- Ability to plan, direct, and evaluate a complex operation, using available resources to accomplish departmental and university goals.
- Ability to establish and maintain effective work relationships with students, faculty, staff, and the public.
- Ability to provide administrative guidance within area of responsibility, providing direct training and supervision as needed.
- Ability to apply budgetary and fiscal planning techniques within financial constraints.
- Ability to organize work effectively, conceptualize and prioritize objectives and exercise independent judgment based on an understanding of organizational policies and activities.
- Ability to integrate resources, policies, and information for the determination of procedures, solutions, and other outcomes.
- Ability to communicate effectively -orally, by phone, in person, and in writing.
- Ability to use a personal computer and other office equipment, including university related software and email.

PHYSICAL DEMANDS

The physical demands described in the Essential Duties and below are representative of those that must be met by an employee to successfully perform the essential duties of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties.

The employee may be required to travel.

WORK ENVIRONMENT

All employees are responsible for maintaining an environment that is free from discrimination, intimidation, harassment, including sexual harassment. Work is normally performed in a typical interior work environment.

SAFETY

TWU promotes a safe working environment. Employees are responsible for completing assigned tasks safely and efficiently, and supervisors are responsible for creating and

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maintaining a safe work environment. Employees must report any unsafe work conditions or practices, as well as any near-miss incidents, to their supervisor and Risk Management. Supervisors and employees should ensure that injury/accident reports are submitted to the Office of Human Resources and Risk Management within 24 hours of the incident.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

Employee Signature: _____ **Date:** _____

Printed Employee Name: _____

Texas Woman's University strives to provide an educational environment that affirms the rights and dignity of each individual, fosters diversity, and encourages a respect for the differences among persons. Discrimination or harassment of any kind is considered inappropriate.

Texas Woman's University is committed to equal opportunity in employment and education and does not discriminate on the basis of race, color, religion, gender, sex, sexual orientation, ethnic origin, age, veteran's status, or against qualified disabled persons.

All positions at Texas Woman's University are deemed security sensitive requiring background checks.