

FOR HUMAN RESOURCES USE ONLY:						PU
APPROVED CLASSIFICATION	CLASS CODE	EEO CAT	APP. BY C&C	MPP CODE	RANGE/ GRADE CODE	DATE
Administrator II	3312	1	MD	C074	1	06/24/24



MANAGEMENT PERSONNEL PLAN (MPP) POSITION DESCRIPTION

1. POSITION INFORMATION

NAME: _____ DEPARTMENT: Budget Planning and Administration

POSITION TITLE: Budget Director

ADMINISTRATOR LEVEL: I II III IV

THIS POSITION REPORTS TO: Jennifer Harris, AVP, Budget Planning and Administration
Name and Title

POSITIONS DIRECTLY SUPERVISED BY THIS POSITION:

Classification: <u>AA/S Ex III</u>	Qty: <u>1</u>	FTE: <u>1</u>
Classification: <u>AA/S Ex I</u>	Qty: <u>3</u>	FTE: <u>3</u>
Classification: _____	Qty: _____	FTE: _____

MAJOR DEPARTMENTS UNDER THIS POSITION:

Department	# of Employees

Please attach current organizational chart with names and classifications included.

2. SIGNATURES

The person holding this position is considered a “mandated reporter” under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.

Appropriate Administrator: _____ Date: _____

Vice President: _____ Date: _____

Employee: _____ Date: _____

FOR HUMAN RESOURCES USE ONLY:	
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Administrator II	Budget Director

3. PRIMARY ACTION BEING REQUESTED

Job Posting: New Position Replacement Position, former incumbent: _____

Update Position Description Only:

Effective Date: _____

4. REQUIRED QUALIFICATIONS

Please list any required knowledge, skills, abilities and experience. Must be appropriate to the skill level of the position and would allow an incumbent to satisfactorily perform the Essential Functions of the position.

Education/Experience:

1. Bachelor’s degree from an accredited college or university, in Accounting, Finance, Public Administration, or a closely related field, or eight (8) years progressive work experience in the field of budgeting, including experience leading or taking a significant role in developing, monitoring, and reporting an annual budget for a public institution.
2. A minimum of five (5) years of progressive work experience in the field of Budgeting including experience leading or taking a significant role in developing, monitoring, and reporting an annual budget for a public institution.
3. Experience working with a diverse group of stakeholders.
4. Advanced experience using computerized financial systems, complex spreadsheets, databases, and query tools.

Knowledge/Skills/Abilities:

1. Demonstrated knowledge of the techniques, methods, and procedures used in the preparation, analysis, and administration of a multi-million dollar budget in a fund accounting system, and of the role of a budget plan and the importance of working within an organizational structure.
2. Demonstrated significant technical and administrative experience involving budgetary planning and development, financial analysis and administration of a large organization.
3. Ability to analyze, evaluate and communicate complex, sensitive financial data.
4. Demonstrated knowledge interpreting complex personnel related policies and procedures.
5. Ability to handle sensitive personnel issues with confidentiality.
6. Ability to analyze and address personnel problems using reasoning, interpretation, and application of theories and principles to develop and recommend alternatives and courses of action, and to apply judgment and discretion reflective of thorough knowledge of policies and procedures.
7. Experience supervising staff and have the ability to provide project leadership and to represent the division.
8. Demonstrated ability to exercise independent judgment to resolve unexpected or unprecedented situations.
9. Demonstrated ability to provide leadership and work collaboratively to meet the mission/goals of the University.
10. Ability to understand and evaluate complex problems from a future-oriented and broadly interactive perspective and to readily develop proactive solutions that integrate strategic goals into tactical operations.
11. Excellent interpersonal and communication skills including the ability to work collaboratively to build consensus, to achieve goals and objectives, and to resolve difficult situations.
12. Ability to work collaboratively as a member of a leadership team and to establish and maintain effective communication and working relationships with university and division constituencies.
13. Position may occasionally require attendance at off-site locations.

CONDITIONS OF EMPLOYMENT

- Ability to pass background check

Employee Initials:

Date:

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APPROVED CLASSIFICATION	WORKING TITLE
Administrator II	Budget Director

5. PREFERRED QUALIFICATIONS

List any desirable qualifications that would enhance an incumbent’s ability to perform the work of the position (e.g., additional years of experience, advanced education, certification and/or specialized training).

1. Experience in position management and position-based budgeting.
2. Experience working at Sacramento State, the California State University system, or in higher education.
3. Experience working with PeopleSoft/Oracle Financial Systems.

6. POSITION PURPOSE:

The position purpose should be a summary of the general nature of the responsibilities of the position plus additional information including scope, context and the general environment under which it functions.

Budget Planning and Administration (BPA) is responsible for the preparation and administration of the University budget. Responsibilities include planning and resource analysis to improve the allocation and use of resources, and developing and implementing fiscal control policies, procedures, and systems. The unit is the primary source for budgetary information and provides professional assistance and advice to campus administration and campus divisions relating to budgetary and other fiscal matters. BPA is also responsible for position management and processing the monthly university payroll data through the Labor Cost Distribution (LCD) module and for the monitoring, analysis, and reconciliation of the payroll to the appropriate accounts in the General Ledger. Responsibilities include input, analysis, testing, and maintenance of the PeopleSoft Position Management and Labor Cost Distribution modules. BPA consists of one Associate Vice President, one Budget Director, one (1) senior finance budget analyst, and three (3) budget analysts.

The Budget Director (Administrator II) reports directly to the Associate Vice President for BPA, and under general direction is responsible for leading and participating in a full range of budget administration tasks including budget development, position management, resource allocation, fiscal projections, and year-end reporting. The position is responsible for meeting deadlines, improving processes, and recommending policy changes, and requires the application of theories, principles, and practices of budgeting. Incumbent must have the ability to analyze unique funding and process issues and to consider, develop, and recommend viable alternatives.

7. ESSENTIAL FUNCTIONS OF THE POSITION:

Describe each major responsibility assigned to this position and indicate the percentage of time devoted to each function, as well as the frequency in which each function is performed.

Essential Functions and Marginal Functions should have a combined total of 100% of Time.

% of Time	Frequency (daily, weekly, monthly, etc.)	Essential Functions Only (List in order of importance)
40%	D/W/M	Budget Development and Administration Develop sound revenue and expense assumptions. Maintains the General Operating Fund Sources and Uses and updates based on AVP, CFO, and President direction and Chancellor’s Office communications.

Employee Initials:

Date:

FOR HUMAN RESOURCES USE ONLY:	
APPROVED CLASSIFICATION	WORKING TITLE
Administrator II	Budget Director

30%	D/W/M	<p>Develops and disseminates annual Budget Call materials to divisions, including instructions to divisions. Oversight of division responses for the President’s Budget Advisory Committee (PBAC).</p> <p>Allocates baseline budget to divisions in accordance with the President’s approved budget, and monitors unique expenses to identify overages and needed corrections</p> <p>Using the Financial Data Warehouse develop quarterly expenditure projections for campus Divisions. Assigns and monitors the completion of projections, communicates with division regarding deadlines, and summarizes projections for submission to the AVP, CFO, and President.</p> <p>Reviews and oversees global funds and directs divisions to correct errors.</p> <p>Provides BPA Analysts with direction and decisions on division requests for budget transfers, expenditure corrections, and fund increases. Assigns and reviews release time calculations and reimbursements.</p> <p>Reviews Internal Fund Transfers (IFTs) and assigns those requiring allocation; obtains President approval as appropriate.</p> <p>Position Management Develops and maintains position management processes and policies and reviews the Universal Position List for accuracy.</p> <p>Provides direction, assigns, or responds, as appropriate to division requests for new positions and position numbers. Drafts memos to the CFO and President for approval of new positions.</p> <p>Oversees operational processes in OnBase for compensation requests such as in-range progressions (IRPs), bonuses, appointments, and separations.</p> <p>As requested by the President, leads the review of aged vacancies and collaborates with HR to identify vacancies for elimination.</p> <p>Directs the accurate completion of monthly labor cost distribution (LCD) and benefit cost distribution.</p> <p>Completes quarterly projections of salary and benefit expenses, and completes estimates of salary and benefit increases driven by collective bargaining. Oversees position management changes resulting in increased benefit costs and initiates fund transfers to recover amounts due to the benefits pool.</p>
15%	Annually	<p>Year-End Financial Reporting Oversees, assigns, and monitors year-end fiscal processes and the annual budget submission (FIRMS) to the Chancellor’s Office. Attends collaboration meetings with Accounting Services.</p>
10%	D/W/M	<p>Personnel Management Recruits, trains, and mentors budget analysts. Determines workload assignments and rotates assignments to enable cross training and coverage. Directs and evaluates staff, and completes performance evaluations.</p> <p>Attends BPA and ABA team and leadership meetings.</p>

Employee Initials:

Date:

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APPROVED CLASSIFICATION	WORKING TITLE
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		<p>Provides training and presentations to the campus community on budgeting processes and appropriate uses of university funds. Directs the update of timely information to the BPA webpage.</p> <p>Attends meetings and acts of behalf of the AVP in the event of their absence.</p>
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8. MARGINAL FUNCTIONS OF THE POSITION:

Describe each non-essential duty assigned to this position and indicate the percentage of time devoted to each function, as well as the frequency in which each function is performed.

Essential Functions and Marginal Functions should have a combined total of 100% of Time.

% of Time	Frequency (daily, weekly, monthly, etc.)	Marginal Functions Only (List in order of importance)
5%	D/W/M	Other duties as assigned by the Vice President for Administration/CFO and the AVP for Budget Planning & Administration

9. ADDITIONAL INFORMATION

To enable appropriate classification determination, please elaborate on the information provided in the previous sections by completing the section below.

9a. Nature and Scope of Authority: (please select one)

- Administrator** – An individual who has full budgetary, personnel authority, and responsibility for formulating and administering policies and programs in the assigned functional area (e.g. Vice President, Dean, Senior Manager). Direct reports may include subordinate supervisors or subordinate managers.
- Supervisor** – An individual who has the authority to hire, discipline, promote or discharge a group of employees (e.g. Payroll Supervisor, Accounting Supervisor). May supervise non-exempt and/or exempt employees, as well as subordinate supervisors.
- Professional** – An individual who has significant responsibility for formulating and administering policies for an assigned program or functional area (e.g. Attorney, Labor Relations Manager, Affirmative Action Officer). No direct reports or supervisory responsibilities.

9b. Problem Solving: Types of problems encountered; issues, concerns addressed; types of problems incumbent required to refer to supervisor or others.

The Budget Director is expected to be familiar with current business processes, including the reasons underlying those process, as the position provides expertise and leadership in areas such as Labor Cost Distribution (LCD) Benefits Allocation, Release Time, Grants and Contracts, CSU Funds set-up, and campus software for financial and human resources. The incumbent will assist the campus community resolve problems or issues that arise, and work with special fund program directors and analysts to develop long-term financial strategies for revenues and expenditures and to set up new programs. Must exercise substantial judgement and analysis and be able to communicate effectively to provide direction and summarize information and decisions.

9c. Contacts On- and Off-Campus: Purpose and nature of working relationships with on- and off-campus contacts.

On-Campus: Serves a key technical advisor to divisions, program centers, and departments including the President’s Office, the Vice Presidents, the President’s Budget Advisory Committee, and various campus committees, grant

Employee Initials:

Date:

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Administrator II	Budget Director

administrators, and university employees. Will provide expertise and research and recommend viable solutions to address problems from a broad university perspective.

Off-Campus: Communicates with the Chancellor’s Office to provide data and information related to the Financial Information Record Management System (FIRMS) budget submissions, to discuss long-range financial plans, to provide feedback on financial and human resources systems, and to attend systemwide teleconferences, conferences, and meetings. Works with the State Controller’s Office to create, modify, and delete reporting units for campus-wide LCD processing. Collaborates with other CSU campus staff to identify best practices and common needs/issues.

10. ADA REQUIREMENTS – MUST BE COMPLETED

To comply with the Americans with Disabilities Act (ADA) of 1990, which prohibits discrimination against qualified individuals on the basis of disability, it is necessary to specify the physical, mental, and environmental conditions of the Essential Functions of the job (with or without a reasonable accommodation).

Use these codes to complete the section below: F (frequently), O (occasionally), N (not at all). Do not use “X.”

PHYSICAL		MENTAL		ENVIRONMENTAL	
F	Sit	F	Direct others	O	Is exposed to excessive noise
F	Stand	F	Concentrate	N	Is around moving machinery
O	Walk	F	Analyze	O	Is exposed to marked changes in temperature and/or humidity
F	Have mobility	F	Use reason/logic		
O	Bend	F	Demonstrate recall	O	Is exposed to dust, fumes, gases, radiation, microwave (circle)
O	Climb	F	Make decisions		
F	Reach	F	Works rapidly	O	Drives motorized equipment
O	Kneel	F	Handle multiple tasks/priorities	O	Works in confined quarters
O	Push/Pull	F	Tolerate variety	N	Works in high places
F	Have gross hand coordination	F	Work with others		Other:
F	Have fine hand coordination		Other:		
F	Hear with background noise				
F	Hear the spoken word				
F	Hear over a phone/other device				
F	See to read fine print				
F	See to read bold print				
F	See to accomplish a task				
F	Talk				
F	Communicate				
O	Lift: <u> 5 </u> lbs. max				
O	Carry: <u> 5 </u> lbs. max				
O	Operate equipment				
O	Perform keyboard entry				
	Other:				

Employee Initials:

Date: