



Administrator Position Description

Human Resource Office Use Only			
Approved Job Family		Effective Date 9/2/2013	
Overtime Eligible YES NO		FLSA Test Date 8/27/2013	
Employee		Supervisor Michelle Meyer	
Department Finance and Administration	Working Title Senior Fiscal Manager	HRIS Position Number H99218	Supervisor Title VP for F & A
Complete contract dates only if other than a 12 month position			
Annual Contract Begin Date		Annual Contract End Date	

A. POSITION SUMMARY

Briefly describe the role of the position within the department and college.

This position reports to the Vice President for Finance and Administration and supports Oregon Tech budget operations and campus budget services. The individual in this position serves as a member of the senior budget administrative team and works to provide Oregon Tech with efficient and effective budget planning and operations, and campus budget services. This position exercises considerable independent judgment and performs complex fiscal analysis, employing a number of sophisticated analytical techniques, to assist upper management in institution-wide decision-making. This position participates in budget planning, policy, and development throughout each phase of the process. Responsibilities include but are not limited to preparing financial impact analyses, developing and recommending solutions involving budget and fiscal policy issues in a variety of contexts to executive staff, Oregon Tech Board of Trustees, and the Higher Education Coordinating Commission (HECC). The incumbent is responsible for assisting in the development of the annual operating budget presented to the HECC. Responsibilities include preparing various financial analyses and reports, preparing revenue and expenditure forecasts, providing recommendations for the university's chart of accounts and drafting budget policy instructions. The incumbent must be able to communicate effectively to all levels of Oregon Tech Board of Trustees, institution staff and external parties, able to work independently, and be able to coordinate multiple projects in a cohesive matrix team environment.

B. REQUIRED DEGREES, LICENSES, CERTIFICATES, CREDENTIALS

1. Minimum education level required and the number of years of relevant experience required for the duties of this position.

Five years of prior experience in budgeting, accounting or finance required. Higher Education experience preferred.

2. List any licenses, certificates, degrees or credentials required by Federal or State Law or college requirements to perform the duties assigned to this position.

Associates Degree required with expectation of Bachelor Degree within reasonable time as negotiated with direct supervisor.

Bachelor's Degree preferred.

C. SUPERVISORY RESPONSIBILITY

Positions Supervised	Direct Supervision		Indirect Supervision	
	Number of Employees	FTE	Number of Employees	FTE
1. Faculty				
2. Classified Staff	1	.25		
3. Unclassified Staff				
4. Students / Others				

Coordinating Responsibility

D. ORGANIZATIONAL RELATIONSHIPS

1. Degree of Direction Received: (e.g., close supervision, moderately high level of supervision, moderate supervision, minimal supervision)

Minimal Supervision

2. Decision-making Authority: Extent of authority for making decisions, recommendations, and commitments that would obligate

a) own time and resources

Full

b) departmental resources

Collaborate with Senior Budget Officer and Vice President of Finance and Administration on General Budget office recommendations and commitments.

c) institutional resources

None

What kinds of decisions will the incumbent be expected to make?

- Evaluate non-standard campus requests
- Answer budget and planning questions
- Assist in hiring new employees
- Coordinate work schedule

3. Budget Authority: Indicate the level of responsibility of the incumbent for development, direction and control of budget. Indicate size of budget.

X	Delegated authority to develop and monitor*	\$Total University Budget
X	Develops, monitors* and controls*	\$25,000
	Limited approval authority for purchase	\$
	Purchase only with higher level OK	\$

*To monitor means to review and approve expenses. Control means to authorize budget transfers at department level.

E. PURPOSE AND NATURE OF WORK RELATIONSHIPS

PERSON(S)/POSITION/ AGENCY (e.g., student, staff, faculty, general public, Board of Trustees)	PURPOSE (e.g., giving or securing information, explaining policies or operations, solving problems, etc.)	HOW OFTEN
Staff/Faculty	Giving or securing information. Explaining policies, problem solving, training	Daily
Oregon Tech Board of Trustees and HECC	Giving or securing information	Monthly

F. JOB FUNCTIONS

REFERENCE ID	JOB FUNCTIONS	FREQUENCY	ANNUAL PERCENT OF TIME
1.0	Responsible for initiating and or recommending necessary changes to improve budget processes, procedures and policies (budget monitoring, review and control). Maintain the University's current year operating budgets; review and approve budget change vouchers and transfer of funds for compliance with University and HECC guidelines; review and if applicable approve for insufficient funds. Assist with building, updating and revising multi-year revenue and expense budget models in support of University planning and budgeting. Develop and maintain a variety of budgetary tools for monitoring and decision-making on an ad hoc basis. Develop and monitor operating budgets for all major operating units of the institution, including auxiliary enterprise operations.	Daily	30
1.1	Responsible for the oversight/maintenance of position management for the university, including providing reconciliations of current positions to budgeted positions. Review funding and provide Budget Office approval for recruitment requests, hiring recommendations, new position requests, and changes in current positions. Provides guidance on resources available for university wide merit and COLA increases. Track salary and other savings and provide reports as needed.	Daily	25
1.2	Coordinate the building of the annual and biennial budgets for all university fund groups. Develop and distribute the annual budget calendar and related instructions. Oversee the budget development process which includes ensuring decisions are properly communicated.	Annually	5

1.3	<p>Train and assist university managers and administrators in the use of university processes, databases, reports, and related tools; design and lead related workshops; provide administrators with budget authority support, account activity explanations and referrals, and problem resolution as required. Advise campus units, deans/directors, and divisions regarding budget development, transfers, reports, calculations, and processes. Analyze monthly budgeting and accounting reports and work proactively with units to maintain expenditure controls. Develop campus-wide budget training and reporting tools.</p> <p>Administrate the functional areas of the FAST Finance, HR, and Budgeting modules. Create user access, assign roles and security levels, troubleshoot issues, and act as liaison between users and Millennium.</p>	Weekly	25
1.4	<p>Work in collaboration with the Director of Business Affairs on maintenance of the chart of accounts. Work with Business Affairs on year-end closing processes and procedures. Responsible for updates to BRP (Budget and Resource Planning) website.</p>	As Needed	5
1.5	<p>Provide monthly budgeted oversight analysis and monitor budget to actual department fund performance providing report of any significant fiscal challenges within operating units of the university to VPFA.</p> <p>Assist in the preparation of various reports to HECC and the Oregon Tech Board of Trustees, such as the quarterly management report, as well as ad hoc reports that may include the analysis of various union bargaining proposals on the University's resources. Assist with generating regular and ad hoc quantitative analyses; create revenue and expense reports (e.g. tuition, compensation, and others) for both operational and strategic planning purposes. Attend meetings as needed to address changes in governance, funding and regulations that impact the University's resources and strategic planning.</p>	Monthly	5
1.6	<p>Supervise the budget portion of the accountant position (.25 FTE). Includes assigning and overseeing work, scheduling, conflict resolution, and performance evaluations.</p>	Daily	5

G. SKILLS KNOWLEDGE AND ABILITIES

Describe the skills, knowledge, and abilities which are essential for successful performance of this position. List them in descending order of importance.

Next, indicate the function(s) for which each skill, knowledge and ability is required.

JOB FUNCTION REFERENCE	SKILLS, KNOWLEDGE AND ABILITIES
All	Knowledge and understanding of fund accounting, financial reporting standards, and accrual basis accounting

All	Experience in directing, managing and accurately reconciling budgets and actual financial activity
All	Proficient experience using a variety of accounting/financial management software programs as well as, general desktop applications Proficient experience using a variety of database mining software programs as well as, ability to learn new applications quickly
All	Ability to work under pressure, effectively plan the workload and meet daily deadlines using independent judgment, accuracy and speed
All	Ability to be discreet and handle highly sensitive and confidential information in a responsible manner
All	Ability to work periodic nights, weekends and travel out-of-town to perform duties
All	Supervision experience, including coordinating work schedules, monitoring duties, troubleshooting issues, and performance evaluations

H. PHYSICAL CHARACTERISTICS/WORK ENVIRONMENT

Only when applicable, please describe the physical characteristics or adverse/hazardous conditions of the essential job functions to be performed.

JOB FUNCTION REFERENCE	PHYSICAL CHARACTERISTICS
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I. ADDITIONAL JOB-RELATED INFORMATION

Please include information on creativity or innovation required for successful completion of job responsibilities and any other comments that would add to an understanding of this position.

The Senior Fiscal Manager's dealings with financial, risk, and policy-regulated issues result in critical decision-making for the institution. The Senior Fiscal Manager must be cognizant of this role and recognize the consequences that can result if/when inappropriate fiscal and/or policy decisions are made.

This position travels multiple times a year to system-wide meetings, as well as regional and national conferences.