

JOB INFORMATION

Effective Date	10/21/2021
Job Code:	3147
Job Title:	Director, Planning and Budget
Salary Grade/Structure:	070 - Admin-Professional
Career Level Name:	
FLSA Name:	Exempt
EEO Code:	10-Exec, Admin, Mgmt
Job Function:	Finance & Accounting
Job Family:	Budget & Planning
Job Summary	Responsible for the preparation, implementation and control of the Annual Operating Budget. This includes planning, development, and implementation of systems and procedures to ensure uniform budget preparation, control and reporting. Responsible for the preparation of the biennial Legislative Appropriation Request (LAR). Directs and manages the operations and staff of the Budget Office. Responsible for preparing and coordinating responses to departments, senior management, external agencies, System Administration and Board of Regents. Responsible for the planning and assessment function of the Budget Office. Represents the University of Houston-Clear Lake on budget issues both at the System Administration and State level.

COMPETENCIES

Competencies

Please refer to the UHCL Human Resources webpage for UHCL core competencies for all eligible job levels.

QUALIFICATIONS

Education

Education Level	Education Details	Required/Preferred	
Bachelor's Degree	Requires a related four-year degree, or equivalent experience	Required	

Work Experience

Experience	Experience Details	Required/Preferred	
Considerable	years directly job-related experience and supervisory experience. Past employment history must reflect administrative and financial positions with increasing levels of responsibility	Required	

Licenses and Certifications

Licenses/Certifications	Licenses/Certification Details	Time Frame	Required/Preferred
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Knowledge, Skills and Abilities

KSAs	Proficiency
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JOB RESPONSIBILITIES

Campus Security Authority

Remote Work Capable

Essential Functions

Essential Function	% TIME
<ul style="list-style-type: none"> Directs and manages the daily operations and staff of the Budget Office to include defining and developing goals, policies and operational procedures, determining work flow, overseeing department operating funds and making staffing decisions. Oversees the problem solving, troubleshooting, testing, training and documentation efforts for UHCL related to the Financial System. 	20%
<ul style="list-style-type: none"> Oversees the preparation of the Annual Operating Budget to include supporting schedule generation, reconciliation of the Budget and monitoring allocation of funding. Prepares revenue projections, establishes the Budget Guidelines, and generates and analyzes the Executive Summary Report submitted to the Board of Regents. 	20%
<ul style="list-style-type: none"> Oversees and participates in the design, development and implementation of the Budget Development System. 	10%
<ul style="list-style-type: none"> Oversees, coordinates and reviews the gathering of data, certain schedule and special item preparation for the biennial Legislative Appropriation Request (LAR) and data entry into ABEST. Prepares and reconciles schedules within the LAR and to the Financial Statements, submitting the final document to the Legislative Budget Board. Analyzes proposed legislative bills and the future impact to the University. 	15%
<ul style="list-style-type: none"> Develops and implements the Unit Assessment Plan. Assesses the results and writes the Unit Assessment Plan Report annually. 	5%
<ul style="list-style-type: none"> Prepares and coordinates responses to departments, senior management, external agencies, System Administration and Board of Regents to include ad hoc report requests, surveys and budget presentation materials. 	10%
<ul style="list-style-type: none"> Monitors University accounts monthly, analyzing actuals as compared to budget. 	5%
<ul style="list-style-type: none"> Serves as liaison between the Business Coordinators and the University, chairing meetings monthly and reviewing accounts quarterly. 	5%
<ul style="list-style-type: none"> Represents the University of Houston-Clear Lake on budget issues both at the System Administration and the State level. 	5%
<ul style="list-style-type: none"> Assist departments and/or management in resolving significant budget issues. 	5%

PRE-EMPLOYMENT

MVR:	No
Criminal History:	Yes
Physical Exam:	No
Hearing Exam:	No
Pulmonary Function Test:	No

PHYSICAL DEMANDS/WORKING CONDITIONS

Physical Demands

Physical Demand	N/A	Rarely	Occasionally	Frequently	Constantly	Weight
Standing						
Walking						
Sitting						
Lifting						
Carrying						
Pushing						
Pulling						
Climbing						
Balancing						
Stooping						
Kneeling						
Crouching						
Crawling						
Reaching						
Handling						
Grasping						
Feeling						
Talking						
Hearing						
Repetitive Motions						
Eye/Hand/Foot Coordination						

Working Environment

Working Condition	N/A	Rarely	Occasionally	Frequently	Constantly
Extreme cold					
Extreme heat					
Humid					
Wet					
Noise					
Hazards					
Temperature Change					
Atmospheric Conditions					
Vibration					

Travel Requirements

Estimated Amount	Brief Description