

## Position Description - Unclassified

### Position Status:

Position Title		Position Number
Budget and Research Director		E99481
Appointment (9mos. / 12 mos. / Other)	Contract Period (from / to)	FLSA
12 mos.	1/1/22-12/31/23	Exempt
Position Type		Regular/Short-Term
Full-Time		Regular
Work Location		Department/Division
Salem campus		Oregon Council of Presidents
Reports to		Reports to Position Number
OCOP Executive Director, Dana Richardson		E99338
Incumbent		University ID #
TBD		

### Program Information:

<p>A. Describe the general program in which this position exists. Include program purpose, size, scope and relationship to the University's mission.</p> <p>The Oregon Council of Presidents (OCOP) is a voluntary organization of Oregon's public university presidents. It was formed to foster coordination and collaboration among the public university presidents and other university officials, to avoid unnecessary duplication of efforts, and to ensure effective sharing of resources, knowledge, best practices and advocacy. It is not a governing body.</p>
<p>B. Describe the purpose of this position and how it functions within this program.</p> <p>This position reports to the Executive Director of the Oregon Council of Presidents (OCOP). The primary role of the Director is to support the OCOP mission with fiscal and data analysis in order to represent OCOP staff, presidents and member institutions among internal and external constituencies.</p> <p>This position will exercise independent judgment and perform work related to financial and managerial accounting and data aggregation and reporting. This position requires understanding and appreciation for the diverse missions and resources of Oregon's public universities. The ability to work constructively with all colleagues and constituencies is essential to the success of this position. This position requires the ability to succinctly compile, analyze and coherently display data and budget information. The Director must be able to communicate effectively to a variety of levels of institutional staff and be able to coordinate multiple projects in a cohesive matrix team environment.</p>

**Position Information and Qualifications:**

A. Description of Duties/Responsibilities – List the major duties assigned to the position. Note percentage of time each listed duty is performed to total 100%. Indicate “E” = Essential, “R” = Revised	
Percent of Time	Duties
	<p><u>University operating budget and capital requests</u></p> <ul style="list-style-type: none"> <li>● Provide expertise in higher education financial policy to support development of operating and capital budget requests and presentations</li> <li>● Assist in developing budget-related communications materials for a variety of audiences</li> <li>● Respond to legislative and executive agency requests for fiscal impact analysis and other budget-related information</li> <li>● Review, analyze and project current service level calculations, institutional cost and resource requirements, revenue and expenditure forecasts and resource allocations</li> <li>● Conduct research and fiscal analyses for policy option packages</li> <li>● Summarize and maintain information on previous legislative budget actions</li> <li>● Develop bill and policy analysis, specifically in the areas of state budgeting and financing • Support review of the universities’ state funding formula and run funding models to project budget allocations • Compose or update budget briefs or other program histories</li> </ul> <p><u>Research and data analysis</u></p> <ul style="list-style-type: none"> <li>● Aggregate institutional information to respond to inquiries on institutional practices and data, budget and fiscal policies and procedures, and ad hoc budgetary and financial studies</li> <li>● Monitor and track public university data and statistics</li> <li>● Provide quality assurance for aggregate and institution-level reporting as well as for underlying data including identification of anomalies, trends, and other issues in need of clarification</li> <li>● Develop Fact Book including institutional information on finance and enrollment</li> <li>● Represent data and narrative reports through summary tables, graphs, and charts</li> <li>● Maintain repository of data not submitted to state and federal agencies</li> <li>● Review and analyze national research and trends that may affect higher education</li> </ul> <p><u>Policy development and analysis</u></p> <ul style="list-style-type: none"> <li>● Analyze and summarize select statewide proposals on academic or other policy matters</li> <li>● Conduct research and develop information to support agreed upon policy proposals</li> </ul> <p><u>Other Duties as Assigned</u></p> <ul style="list-style-type: none"> <li>● Support development of OCOP annual budget</li> <li>● Monitor OCOP budget balances and bring issues or propose corrective actions to Executive Director</li> </ul>
B. Required Qualifications	
<p><i>List any certificates, licenses, academic degrees, or experience <u>required</u> to perform the duties of this position. Indicate if a combination of education and experience is acceptable.</i></p> <ul style="list-style-type: none"> <li>● A bachelor’s degree from an accredited institution with significant coursework in finance, accounting, or public administration combined with at least 3-5 years of progressive related responsibility OR a master’s degree and at least one (1) year of related experience.</li> </ul>	



<ul style="list-style-type: none"> <li>• Experience in preparing and analyzing financial and managerial reports.</li> <li>• Experience in researching, analyzing, and applying laws, rules, and regulations.</li> </ul>
<b>C. Preferred Qualifications</b>
<p><i>Describe preferred education, experience, skills, licenses, certificates, and other qualifications for this position.</i></p> <ul style="list-style-type: none"> <li>• Higher education experience and experience with statistical methods.</li> </ul>
<b>D. Knowledge Areas</b>
<ul style="list-style-type: none"> <li>• Demonstrated ability to support the organization’s mission with work efforts consistent with values of accuracy and timeliness, ability to anticipate needs, and flexibility.</li> <li>• Understanding of key university performance metrics (e.g. access; student success; research productivity). • Proven analytic and research abilities.</li> <li>• Advanced communication skills.</li> <li>• Ability to document and present information and ideas clearly and effectively.</li> <li>• Ability to work in an environment of group decision-making in a complex, decentralized environment. • Ability to work both as a team member and independently.</li> <li>• Ability to meet deadlines and to maintain a positive attitude while working under pressure.</li> <li>• Ability to work effectively with OCOP and university staff.</li> </ul>

**Budget Authority:**

Indicate the level of the position’s responsibility for the development, control, and monitoring of budget. Indicate the size of the budget. Check all that apply.		
<input type="checkbox"/>	Develops, monitors*, and controls* <i>*Monitor means to review and approve expenses; control means to authorize budget transfer at the department level</i>	\$
<input type="checkbox"/>	Delegated authority to monitor budget	\$1,000,000
<input type="checkbox"/>	Limited approval authority for purchase	\$
<input type="checkbox"/>	Purchase only with higher level approval	\$

**Supervisory Authority:**

If this position has the authority to act or effectively recommend action affecting employees in the following areas, check all that apply.			
<input type="checkbox"/>	Hire	<input type="checkbox"/>	Assign Work
<input type="checkbox"/>	Transfer	<input type="checkbox"/>	Recommend salary adjustments
<input type="checkbox"/>	Discipline	<input type="checkbox"/>	Approve requests (i.e. leave)
<input type="checkbox"/>	Dismiss	<input type="checkbox"/>	Respond to complaints/grievances
<input type="checkbox"/>	Layoff	<input type="checkbox"/>	Conduct performance assessments
<input type="checkbox"/>	Promote	<input type="checkbox"/>	Give Direction



**Positions Supervised:**

Type	# of Employees	Total FTE
Teaching faculty		
Classified staff		
Unclassified staff		
Student Employees (average per term)		
Other (specify)		

**Decision Making Authority:**

Describe the breadth and scope of decision-making authority and discretion the position has to formulate, implement, evaluate, approve and/or modify department and/or university policy, procedures, and/or programs. Describe the type of review and/or approval required by a higher level.

**Additional Information:**

List any additional information that would help describe the nature of the position.

**Acknowledgement**

Employee Printed Name	Employee Signature / Date
Supervisor Printed Name	Supervisor Signature / Date
Reviewer (VP / Director)	Reviewer Signature / Date
Appointing Authority	Appointing Authority Signature / Date

**HR USE ONLY:**

Received by	Date		
Position Class # (Ex. UF101)	Employee Class	Job Location	Appointment Percent
CUPA-HR# / Title	NOC Code	Category Code	SOC Code
Actions Taken			

	NBAPBUD/NBAPOSN
	NBAJOBS
	PEAFACT
	Electronically Filed