



CHOOSE OHIO

Grow your career and further your impact at Ohio University

OHIO
UNIVERSITY



About **OHIO** **UNIVERSITY**

Ohio University (OHIO) strives to be the best student-centered, transformative learning community in America, where more than 30,000 students realize their promise, faculty advance knowledge, staff achieve excellence, and alumni become global leaders. OHIO is committed to fostering, embracing, and celebrating diversity in all its forms. Our Athens campus offers students a residential learning experience in one of the nation's most picturesque academic settings. Additional campuses and centers serve students across the state, and online programs further advance the University's commitment to providing educational access and opportunity. Visit www.ohio.edu for more information.





About the **FINANCE & ADMINISTRATION DIVISION**

Finance and Administration currently is comprised of more than 500 full-time staff who serve faculty, students, staff and the University community through several offices and functions: Human Resources, Real Estate, Transportation and Parking, Mail Services, Finance, Architecture Design and Construction, Moving and Surplus, Printing Services, Facilities Management and Safety, Ohio University Police, Airport and Sustainability. The division reports directly to Ohio University President Hugh Sherman, and focuses on the University's [Fearlessly First: OHIO's Strategic Framework](#).

The Finance and Administration Division exists to provide services that support the academic mission of Ohio University. The Division pursues a continuous improvement approach to deliver efficient and high quality service to faculty, students, students and the OHIO community. We strive to engender a sense of collaboration and community and to provide an appealing environment that creates a special place in which to learn, live, and work.

The actions of the Finance and Administration Division are characterized by the following values: competence and professionalism, ethical behavior, positive, safe environment, effectiveness in communication and integrity. The Division demonstrates these values by responsibly providing valued service, representation, and expertise; leading by example through honesty, respectfulness, and understanding of the impact to the community; while promoting the highest regard for protecting personal well-being, inclusiveness, and diversity; participating in constructive dialogue and open exchange among all constituents and striving for consistency between our values and actions.



**SENIOR VICE PRESIDENT
FOR FINANCE AND ADMINISTRATION, CFO AND TREASURER**



About **BUDGET PLANNING & ANALYSIS**

The Office of Budget Planning and Analysis (BPA) is responsible for coordinating the annual University budget process, collecting and analyzing data to support the annual budget presented for Board approval, and monitoring the University budget/forecast throughout the fiscal year. We provide support to planning units on the development of their budgets through models, guidance, and budget tools.

Our office also provides operational support to the university by creating and maintaining certain allocation journal entries, processing budget transfers, and original budget corrections when needed. We also provide direct support to the Budget Partner Group and Budget Planning Council with information and reporting as needed.



The annual budget process begins in September with the release of updated models, guidance, and tools for planning units to utilize in the development of their annual budget. Using our guidance, and unit specific knowledge, planning units provide financial forecasts for the current year, a budget for the following year, and forecasts for three additional years. These materials are returned to our office in October, at which point BPA staff review and compile the University budget. Financial review meetings provide planning units and leadership the opportunity to review the projected financial forecasts and budget projections.

After the Fall financial review meetings are complete, our office, in conjunction with leadership, will revise the planning assumptions and guidance. This revised guidance is provided to planning units in January/February. Planning units are then asked to revise their current year forecast and future year's budgets for re-submission in March. After the Spring budgets are compiled, leadership will make final budget decisions communicate any changes to planning units. Final budgets are then "locked down" in April/May. Our office prepared the final budget recommendations in the form of the Budget Book, and submits it to the Board of Trustees for approval in June.

The BPA office is responsible for coordinating the annual University budget process, collecting and analyzing data to support the annual budget presented for Board approval, and managing and monitoring the University budget throughout the fiscal year. The office works closely with the Provost's office, Finance, and planning units regarding University budget and planning.





A summary of the **BUDGET DIRECTOR POSITION**

Ohio University invites applications and nominations for the position of Budget Director.

With its historic main campus in Athens; five regional campuses; three extension campuses in the Columbus, Cleveland, and Dayton areas; and one of the largest enrollments of online students among public universities in Ohio, the University has a collective enrollment of over 30,000 students. The stunning 1,740-acre main campus is located in what has been named one of America's best college towns. The campus seamlessly merges with Uptown Athens, which is rich with local food culture and walking distance from historic neighborhoods. Established by the Northwest Ordinance of 1787 and chartered in 1804, Ohio University is the state's first institution of higher education and one of America's oldest public universities. Today, OHIO is classified as a research university with high research activity by the Carnegie Foundation.

The Finance and Administration Division reports directly to Ohio University President Hugh Sherman, currently is comprised of more than 500 full-time staff who serve faculty, students, staff and the University community as a collaborative team through several offices and functions: Human Resources, Real Estate, Transportation and Parking, Mail Services, Finance, Architecture Design and Construction, Moving and Surplus, Printing Services, Facilities Management and Safety, Ohio University Police, Airport and Sustainability.

As an engaged member of the senior vice president's leadership team, the Budget Director leads the University Budget process by overseeing the office of Budget Planning and Analysis and by working with University stakeholders in the budgeting process. The role provides leadership and support in numerous University committees. Works with financial leadership team in development of analysis, reporting and financial decision making.

[Continued on next page](#)

Key Responsibilities

The position provides leadership and oversight in the following areas:

- Support executive leadership decision making by:
 - Presenting analyses, impacts, and recommendations regarding budget drivers and assumptions inclusive of raise pools, benefit escalators and utilization, tuition and fee increases, enrollments, financial aid, new programs and investments
 - Providing expertise and analyses regarding external factors that impact institutional financial planning inclusive of federal and state budget bills and state allocation models and methodology
 - In partnership Chief Facility Officer, Executive Director Treasury Management and Director of Investments, analyze and model impacts of external and market factors on cost escalators and revenues with respect to interest rates, investment performance, commodity rates, forward pricing agreements on institutional budgets and cashflow projections
 - Interacting with, and providing direction and training to, university administrative units in development, reconciliation, and forecasting unit budgets on a multi-year basis
 - Provide consultation and advice to Academic Budget efforts within the Provost organization on academic unit budget submissions, analyses, trends and forecasting.
- Provide leadership and direction for utilization and implementation of information technology and the creation & maintenance of budgeting tools, models, templates & guidance:
 - Leading development of business requirements as drivers for new tools and enhancements, external RFP's and fit gap analyses. Functional lead for implementation of new software/systems.
 - Defining inputs, tools, templates to support the development of planning unit budgets and consolidations
 - Serving as advisor and resource to other university departments (i.e. IR/Enrollment/Treasury/Facilities) in the development of forecasting and financial modeling
 - Collaborating with Financial Systems Team, IT, Accounting in creating integrations with existing institutional systems to streamline processes and create efficiencies
- Provide leadership and analyses in collaboration with the AVP, Finance in the quarterly development of institutional operating and non-operating forecasting, variance/flux analyses and respective impacts on multi-year budgets and decision processes. Support fiscal year audit activities as necessary.
- Lead and direct presentation of budget materials:
 - Working with stakeholders in creation of university Budget Book, including communicating and enforcing deadlines, reviewing, and editing submissions, creating narratives and supporting graphs, and assembling the document
 - Creation of presentations for BOT discussions and approvals
 - Lead discussions and manage agendas for institutional committees inclusive of Budget Planning Council, Budget Partner Group, Executive Budget Group
 - Participating in SEEC (strategic enrollment committee) subcommittees as appropriate with respect to budget planning impacts
- Represent Ohio University on IUC (Inter University Council) Committees; analyze proposals and discussions for impact on Ohio University as well as Ohio university sector. Interact with Chancellor's staff at the Department of Higher Education (DHE) for necessary approvals, interpretation of Ohio Revised Code, and university fiscal strategies as appropriate.

For additional details, or to submit an application, please visit

<https://www.ohiouniversityjobs.com/postings/37622>



About the **ATHENS COMMUNITY**

What strikes most newcomers to Athens is the area's dedication to cultivating community. Founded in 1797, Athens was an important stop on the Underground Railroad, and the United Mine Workers of America started as a gathering of coal miners in the area. A nationally recognized local food scene, a location near some of the state's best hiking trails and parks, a place in the Top 100 Art Communities in America, and a long history of campus and city activism related to sustainability and social justice have all helped to establish Athens as one of today's "50 Best College Towns to Live in Forever." Annual local events like the Pawpaw Festival and the Nelsonville Music Festival celebrate the area's natural beauty and reputation for not only being a growing tourist destination, but also a family-friendly and safe place to live.

More information on Athens and its surrounding area can be found at www.athensohio.com

Athens, Ohio

BEYOND THE BRICKS



**INTERNATIONAL STREET FAIR • PAW PAW FESTIVAL • HOCKING
VALLEY SCENIC RAILWAY • NELSONVILLE FINAL FRIDAYS •
ATHENS BREW WEEK • ATHENS FARMERS MARKET • 30 MILE
MEAL • WAYNE NATIONAL FOREST • STROUDS RUN STATE PARK**



ATHENS AND THE SURROUNDING AREA

COLUMBUS, OH — 76 MILES
CHARLESTON, WV — 90 MILES
CINCINNATI, OH — 157 MILES
LEXINGTON, KY — 184 MILES
PITTSBURGH, PA — 201 MILES
CLEVELAND, OH — 217 MILES
INDIANAPOLIS, IN — 250 MILES
DETROIT, MI — 277 MILES
NASHVILLE, TN — 423 MILES
CHICAGO, IL — 431 MILES

City of Athens

www.ci.athens.oh.us

Athens County Visitor Bureau

athensohio.com

Athens City Schools

athenscsd.org

Athens Farmers Market

athensfarmersmarket.org

Hocking Hills

hockinghills.com

Strouds Run State Park

parks.ohiodnr.gov/stroudsrun

Learn **MORE ABOUT...**

Our Robust Benefits Package

Ohio University is proud to offer a robust healthcare plan that includes maternity care, transgender care, counseling and mental healthcare, prescription coverage, vision, dental, and orthodontia care. Our robust benefits package also includes paid holidays, sick time, personal time, a tuition waiver up to 100% for self and dependents, a comprehensive insurance package (including but not limited to prescription, vision, dental, and life insurance), an excellent retirement plan with up to a 14% company contribution, a 12-week parental leave program, adoption reimbursement, flextime and flexplace policies, an employee assistance program, access to professional development programs, and more.

For more information, visit ohio.edu/hr/benefits.

Employee Involvement Opportunities

As part of our constant effort to foster an inclusive, welcoming workplace, OHIO is home to various involvement opportunities for faculty and staff including a number of employee affinity organizations; a wide array of on-campus programming; shared governance opportunities; and a variety of mentoring, professional development, and continuing education opportunities.

For more information, visit ohio.edu/hr/additional-resources/employee-involvement.

On-Campus Employee Resources

We are proud to meet the needs of our diverse workforce, students, and community members with an ever-growing list of resources including lactation spaces, prayer and meditation spaces, and a variety of campus centers and offices including the Office for University Accessibility and several centers housed within the Division of Diversity and Inclusion.

For more information, visit [ohio.edu/hr/resources/ accessibility-and-accommodations](https://ohio.edu/hr/resources/accessibility-and-accommodations).



