

Vice Provost for Budget, Planning and Strategic Analysis

University of San Francisco

Position Description

The Vice Provost for Budget, Planning and Strategic Analysis (VP BPSA) leads efforts to align the University's resources with its mission and strategic priorities, working collaboratively to build a thriving enterprise that generates and shares abundance with those who live, learn and work at USF now, and into the future. The VP BPSA fosters an institutional culture in which budget-related data is accessible and used effectively and transparently to aid decision-making, resource allocation, and planning. With direct responsibility for the institution's forecasting, and budget development, the Vice Provost works closely with the Provost/VPAA, Vice President for Business and Finance, University leadership, strategic enrollment management and academic deans to develop realistic and growth-oriented models for the University, its schools, college and multiple sites. The VP BPSA realizes and facilitates transparent and participatory processes for managing the university's financial and physical resources, through the [University Budget Advisory Council](#) and University Space Committee, and through regular presentations to faculty, staff, and University leadership.

The VP BPSA supports the academic deans and the Senior Vice Provost for Curricular Innovation and Inclusive Excellence in their assessment of academic programs and provides pertinent forecasting and analysis to facilitate the strategic development of new academic programs that advance the University's mission and meet student demand. The Vice Provost partners with academic deans to develop effective budget models and align resource allocation for the University's distributed campus organization. Currently, the University offers academic programs in Sacramento, Pleasanton, San Jose, Santa Rosa and Orange County, and it may develop other sites or campuses in the future. The VP BPSA also provides oversight for the activities of the Office of Contracts and Grants. The Vice Provost Works with the Provost Team, deans, and Development Office to cultivate a grant-seeking culture and leverage grants to support the Strategic Plan and school-level strategic priorities.

The VP BPSA reports to the Provost/VPAA, serves as a member of a dynamic and cohesive provost's team, and is a member of the [Provost's Circle](#) and [Leadership Team](#). The Vice Provost supports the Vice President for Business and Finance as resource personnel for the Finance Committee of the Board of Trustees and provides regular written reports and presentations to the President's Cabinet. The VP BPSA is guided in their work by the University's mission and Jesuit values. They lead with creativity, entrepreneurialism, integrity, transparency, engagement, sound judgment, cultural humility, and an equity lens, engendering a collaborative approach to budget and planning.

SUPERVISES:

- Assistant to the Vice Provost and Assistant Director, Center for Institutional Planning and Effectiveness
- Associate Vice Provost, Planning and Budget
- Director, Office of Contracts and Grants

RESPONSIBILITIES:

Budget and Planning

- Oversees the Office of Planning and Budget and coordinates the development of the University's budget including revenue and expenses estimation;
- Ensures the alignment of the University's budget and planning process with the University's mission, its strategic initiatives, and its academic goals;
- Forecasts and models budget and planning processes to anticipate the results of various university decisions including the effects of enrollment plans, allocation of staff and faculty, and divisional/departmental strategic plans;
- Authorizes significant expenditures and financial commitments within the Division of Academic Affairs, including expenditures and commitments related to staffing, purchase requisitions, budget transfers, etc.;
- As authorized by the Provost, acts as the Provost's agent with respect to certain budgetary, financial, and policy matters, including: drafting policies, implementing practices, overseeing budget reallocations, approving expense reports, coordinating deployment of faculty lines, assisting with negotiating budget in relation to graduate enrollment targets, etc.;
- Utilizes and leverages the University's data warehousing and reporting capacity to prepare financial reports as requested by University administrators or the Board of Trustees;
- Works with the deans of the schools and College to maximize enrollment and net tuition generation at the University's schools, college and additional campuses.

Strategic Analysis and Planning

- Supports the University's strategic planning process, develops tracking mechanisms to assess the financial goals of the Strategic Plan, and ensures regular reporting of progress made in achieving the institution's strategic goals;
- Monitors the financial performance of all schools, the College, and University divisions, reviews the budgetary implications of all new initiatives, and makes recommendations to the Provost/VPAA and other University leaders as appropriate;
- Conducts analytic reviews of the university's schools and college, multiple sites, as well as new strategic programs and initiatives under consideration;
- Provides strategic analysis as requested by the deans and other University stakeholders;

- Partners with deans and associate deans to develop realistic and growth-oriented models for the University, its schools, college and multiple sites.

Contracts and Grants

- Partners with the Provost Team, deans, and Development Office in the development of a University-wide grant-seeking culture.
- Works with the Director to oversee pre- and post-award functions for government-funded grants.
- Reviews and approves federal grants and contracts.
- Oversees the University compliance with federal, state and local funding agency requirements.
- Represents the University to the Office of Research Integrity at the Department of Health and Human Services

Shared Governance

- In collaboration with the Vice President for Business and Finance, communicates related decisions, efforts, and results to the Finance Committee of the Board of Trustees on a quarterly basis;
- Serves as chair of the University Space Committee and manages high-level space planning issues for the Division of Academic Affairs.
- Serves as tri-chair of the University Budget Advisory Committee;
- Works collaboratively to foster an equitable institutional culture in which budget-related data is accessible and used effectively and transparently to aid decision-making, resource allocation, and planning;
- Partners with UBAC members to elevate knowledge and understanding of the University's budget processes and decision-making by diverse faculty, librarians, staff and students.

Other duties

- Performs other duties as assigned.

QUALIFICATIONS:

- An MBA, CPA, Ph.D. or equivalent professional experience in an academic setting — preferably in the areas of strategic and budget planning, data management and analysis, and goal setting and tracking.
- Experience with pre- and post-award grantsmanship and cultivating a grant-seeking culture.
- Familiarity with research compliance and intellectual property administration
- At least five years of senior-level experience in financial planning and forecasting modeling in an academic setting;
- Significant experience in managing professional staff;

- Demonstrated experience recruiting and retaining a diverse workforce and fostering a climate of inclusion, *cura personalis* and gender and racial equity;
- Willingness to innovate and identify institutional best practices that can be implemented at the University;
- Strong analytical and problem-solving skills as well as excellent communication skills, flexibility, and a commitment to transparency and collaborative work;
- Vigorously supports the mission and values of the university and is committed to advancing them.
- Skilled at project management and developing, implementing and evaluating strategic initiatives.
- Thrives in a fast-paced, intense working environment.
- Highly effective at time and task management; uses technology to manage tasks efficiently and collaborate on work projects.
- Demonstrated willingness and ability to listen to, communicate and collaborate with university stakeholders, acting as a team player in support of the university's priorities.
- Commitment to an organizational culture marked by trust, integrity, transparency, inclusiveness, professionalism, and respect for diversity in all its forms.