



MPP POSITION DESCRIPTION

Department: Extended Learning (EL)
Working Title: Executive Director, Business Operations & Finance
Class Code: 3306
Time Base: 1.0
Position Number:
MPP Job Code: M013

Position Reports To: Dean, EL & Global Programs
Classification: Administrator III
Range Code: 1
Exempt or Non-Exempt: Exempt
Last Update: 5-4-2021

PURPOSE OF POSITION:

The Executive Director of Business Operations and Finance reports to the Dean of Extended Learning (EL) and Global Programs and Services, and provides leadership, management, planning and directions to the unit’s business operations and finance. Extended Learning and Global Programs and Services is a large, complex, and highly innovative component of California State University San Marcos (CSUSM) that is led by an executive team composed of the Dean, three Associate Deans (responsible, respectively, for academic programming and planning, student success and enrollment, and global programs and services), and by the Executive Director who is responsible for the unit’s effective business operations and financial management. The Executive Director is the senior administrative officer in EL with responsibility for effective operation of administrative services, information systems and services, financial management, and compliance with CSU, CSUSM, and relevant State and Federal administrative policy and practice, administrative processes improvement, external contracts and agreements, internal MOUs, CSU Special Pay, purchasing, and all facilities used and operated by EL in all locations.

The Executive Director maintains an extensive network of working relationships within the larger university and the overall California State University system. The Executive Director is responsible for keeping EL operating effectively, in compliance with all relevant policies and best practices, providing exceptional internal support services related to financial stability. The Executive Director innovates to keep EL at the forefront of administrative practices. The Executive Director plans financial analysis with great attention to detail and is proactive in monitoring the effectiveness of administrative services and the stability of the operation’s financial performance. The Executive Director is an effective manager of support staff and is skilled at maintaining a positive and productive working environment. The Executive Director works in close collaboration with the Associate Deans and Dean of EL to lead EL forward with insight, creativity, and commitment to excellence in support of the EL and university mission, purpose, and vision in a fiscally responsible way. The executive director is responsible for the excellence of the EL business operation and administrative practices. Performance in this role is evaluated primarily on this core work.

MAJOR RESPONSIBILITIES:

	<u>% OF TIME</u>
1. Business Operation Management	30%
2. Financial and Budget Planning and Management	30%
3. Leadership/Management	20%
4. Strategic Planning and Special Projects	10%
5. University and Community Partnership	10%

LIST OF DUTIES FOR EACH MAJOR RESPONSIBILITY:**1. BUSINESS OPERATIONS MANAGEMENT:**

Develops, implements and interprets business and administrative policies, and monitors compliance with and changes in CSU policy (Executive Orders, coded memoranda, etc.) and changes in CSUSM policies and directives that may have financial impact on operations. Informs and keeps the Dean and Associate Deans up to date on specific relevant policy changes, as well as the entire division of EL as necessary. Participates in the shaping of CSU and CSUSM administrative policies to ensure that the distinctive needs of self-support programs and services are being appropriately considered when policies are developed or changed. Responsible for monitoring, refining, and developing new administrative processes in EL in support of the changing and evolving work of the unit specific to budgetary implications. Monitors best practices within the CSU and nationwide in higher education, continuing higher education and private enterprise to identify promising new approaches, service providers, and other resources that can improve administrative practices and streamline procedures to provide cost effective and excellent service to students, instructors, and EL staff across the division. Ensures that EL always operates in full and transparent compliance with CSUSM and CSU fiscal policies. Ensures EL operates in compliance with CSUSM human resources policies and practices. The CSU and CSUSM faculty and staff are unionized and, working with the CSUSM Office of Human Resources and the CSUSM Office of Faculty Affairs, responsible for ensuring that the EL operates in compliance with union agreements. Develops and maintains strong and productive working relationships with CSUSM Office Human Resources and Faculty Affairs and collaborates with them to address the distinctive needs of EL on matters related to budget and compliance. Establishes processes and standards of practice in keeping with CSU and CSUSM policies handling the assignment of contracts for instructors, academic student assistants and consultants, including "special pay" for CSUSM faculty teaching in self-support programs. Oversees the EL staff in developing contracts for instruction, and processing faculty, academic student assistants and consultants pay. Develops and maintains effective working relationships with the leadership of CSUSM's Payroll Services.

2. FINANCIAL AND BUDGET PLANNING AND MANAGEMENT:

Ensures that all required CSUSM and CSU administrative and financial reporting is done on time and with accuracy. With the Dean and Associate Deans, develops long-term financial plans and goals with a focus on revenue generation. Takes lead responsibility for developing the yearly budget using a collaborative approach with unit and function leaders in EL responsible for ensuring EL operates within budget and is financially stable. Be proactive in monitoring, analyzing, and tracking the financial performance of individual programs and the unit. Ensure innovation, transparency, accuracy, and policy compliance in all aspects of the work of the financial unit. Develops and maintains strong working relationships and open and collaborative communications with Finance and Administrative Services (FAS) at CSUSM, colleagues within the CSU, and finance officers in each CSUSM collaborating college. Responsible for developing the procedures and training staff to work directly with students to deal with student account issues. Develops effective practices for collection of past due fees that are in keeping with CSUSM standard values and practices. Lead for all aspects of contacting (including letters of agreement, memoranda of understanding/agreement, and other types of agreements involving a financial arrangement). Works closely with the CSUSM offices of contracting and risk to ensure that all EL contracts and agreements are in keeping with CSUSM and CSU standards, policies, and practices. Develops as well as helps to negotiate contracts and agreements. Oversees the financial staff responsible for managing contracts and developing routine contracts with vendors. Responsible for ensuring that EL staff members understand purchasing procedures at CSUSM, and that EL is current, effective, and in compliance with its purchasing procedures. Analyzes the financial performance of each program and makes recommendations to the Dean on fee changes based on program budget.

3. LEADERSHIP/MANAGEMENT:

Establishes and provides clear vision and direction to the Finance unit and has supervisory responsibility for its staff members and student assistants. Responsible for ensuring high performance from each staff member reporting directly or indirectly to the Executive Director, and cultivating and maintaining positive, productive, and co-creative working relationship among staff members. Builds and maintains positive, productive, and co-creative working relationships with other senior professionals in EL and with peer professionals throughout the University and CSU system. Responsible for ensuring smooth communication, effective setting of priorities, ongoing performance feedback, performance goal setting, mentoring/coaching and conducting an open and accurate annual evaluation of each staff member in the Finance unit. Effectively solves performance problems following current University procedures. Builds staff engagement in the work of EL and developing and maintaining a positive and supportive working context for productive, innovative, and engaged working teams. Acts as a change champion and builds

competence in staff through effective coaching, performance management and mentoring. Builds effective teams committed to organizational goals. Leads by addressing difficult issues. Supports a culture of continuous improvement by evaluating current processes and/or procedures, identifying departmental challenges, and proposing effective solutions. Monitors resource needs, oversees the budget process, and proposes recommendations to effectively manage the overall EL operation. Manages and resolves complex issues as well as builds collaborative relationships with key campus departments. Creates an environment in which employees are recognized for their accomplishments and contributions to the success of the team. Facilitates an environment that motivates, empowers, and inspires a commitment to diversity, professional growth and development. Demonstrates commitment to creating and sustaining a diverse and inclusive workforce.

4. STRATEGIC PLANNING AND SPECIAL PROJECTS:

Defines, creates and implements short-term and long-term strategic operational and financial goals for EL. Provides directions and makes decisions on allocating resources to implement EL strategic goals. Effectively communicates the strategic initiatives and action plans, and effectively implements and accomplishes strategic goals for EL. Ensures EL strategic goals align with and support the overall mission, vision and values of the university. Works on special projects for EL as needed.

5. UNIVERSITY AND COMMUNITY PARTNERSHIP:

EL's success depends heavily on its ability to build strong working relationships and sustained and mutually beneficial partnerships within the University and among the external constituencies that can best benefit from CSUSM's educational resources. The Executive Director must represent EL within the University and among external stakeholders in a manner that highlights the values of EL and builds positive and productive working relationships. Working closely with the Dean and Associate Deans, the Executive Director serves as EL's lead for building and sustaining strong and positive working relationships with CSUSM's senior professionals and administrative unit directors. Represents EL on various CSUSM working groups and committees, at CSU meetings, and other State, national, or international gatherings relevant to the work of EL. Considerably understands the work of EL and serves as a source of current and accurate information on and off campus.

SUPERVISION OF OTHERS:

Extended Learning Budget and Operations Staff

- Budget and Operations Manager (1)
- Faculty and Students Contract Specialist (1)
- Faculty Contract Specialist (1)
- Student Finance Specialist (1)
- Accounting Technician (1)

PURPOSE AND NATURE OF WORK RELATIONSHIPS:

Daily/weekly interaction with CSUSM administration, faculty, and staff. Regular interaction with the community and public including vendors, contractors, instructors, consultants, and community leaders. Regular interaction with CSU-wide administrators and system-wide colleagues to share/provide information, collaborate, consult, and resolve issues.

REQUIREMENTS OF POSITION:

1. List education and experience required

- Master's degree in accounting, finance, business or a closely related field **and** minimum of seven (7) years of experience in accounting and financial administration, business operations, budget development/maintenance, systems development, project management and policy compliance, which includes a minimum of three years (3) of experience in a senior level administrative role with direct responsibility for staff management, business operations and finance; OR an equivalent combination of education and experience.

Preferences

- Experience in an academic setting, ideally CSU and/or Continuing Higher Education.
- Demonstrated record of accomplishment providing successful administrative leadership for a unit/department/college in a large comprehensive university.
- Experience managing self-support units in a college of university and/or continuing higher education units is a significant advantage.
- Managerial experience at a senior level in a large and complex organizational context.

2. **List knowledge, skills, and abilities required for this position.**

- Commitment to CSUSM's mission and vision.
- Ability to establish clear and understandable goals and see through to implementation.
- Ability to lead and enable groups of people to face challenges and achieve results in complex conditions.
- A commitment to diversity, inclusiveness and access in all areas of the university.
- Ability to establish and maintain effective relations with University employees and the public.
- Ability to work with vendors and partners to negotiate, develop, and manage contracts and agreements for a wide range of products, services, and collaborative relationships. And ability to work effectively with CSUSM's contracting office and the CSU's legal counsel and related contacting services.
- Demonstrated ability to provide financial leadership for a significant unit/department/college.
- Proven skills in financial planning, contract development and negotiation, financial analysis, budgeting, and financial strategy.
- Experience in a senior administrative/management role with responsibility for the financial stability and success of a college/unit – demonstrated ability to ensure manage the financial affairs of an organization in ways that lead to financial stability and financial success.
- Successful experience managing a complex organization.
- Familiarity with collective bargaining and administering corrective action as appropriate in a collective bargaining environment.
- Ability to lead courageously by addressing difficult issues.
- Ability to prioritize and handle issues based on sense of urgency and importance of the issues.
- Ability to ensure confidentiality around sensitive issues.
- Ability to apply quality management techniques of continuous improvement and employee involvement to assess and improve services, promote campus culture and build teams.
- Ability to identify current and future challenges and propose and implement effective solutions.
- Experience making effective decisions with sound analytical ability, good judgment and strong operational focus.
- Excellent oral and written communication skills.
- Ability to communicate effectively and with purpose to a variety of audiences.
- Possess the well-developed technical proficiency needed to work with the University's primary academic and administrative technologies. Comfortable learning new technologies and working with online programs and services.
- Ability to develop and maintain strong and positive working relationships within units and across the University.
- Ability to command the respect and positive regard of students, faculty, administrators, and staff at all levels
- The ability to work effectively and build strong alliances internally and externally with a broad range of individuals.
- Ability to recognize, understand, and appreciate different roles across the institution.
- Demonstrated ability to manage large projects with a wide range of stakeholders.
- Demonstrated ability to work well with a wide range of individuals with diverse backgrounds, different working styles, different communication styles, and different levels of organizational abilities.
- Demonstrated ability to show respect for all people and be comfortable working and leading in a diverse and inclusive institution.
- Ability to foster mutual support, respect, and collaboration throughout Extended Learning.
- Demonstrated record of innovation, creative problem solving, and ability to respond rapidly to a changing array of opportunities.
- Ability to apply forward-thinking and creative thought with high ethical standards to develop strategic vision.
- Experience in strategically supporting growth and/or change.
- Experience creating and implementing long and short-term goals.
- Experience in determining and coordinating resource allocations.
- Experience with directing, supervising, motivating and inspiring others; measuring the performance of people, teams and organizations, and assessing performance and progress.
- Significant experience with hiring, coaching and mentoring staff to enable peak performance and growth, performance evaluation, experience providing regular feedback and positive encouragement, experience

dealing with performance issues and successfully correcting them, experience with staff disciplinary action and dismissal.

- Proven ability to be a positive and productive manager that inspires and supports others and engages them in the work with a focus on the longer-term goals and the importance of the mission, purpose, and values of the unit.
- Proven ability to make hard choices and maintain high-performance standards and recognize and cultivate talent and support and encourage strong performance.
- Ability to build organizational excellence by building individual excellence in staff and unit teams.
- Ability to develop and support on-going learning and professional development for staff, managers and emerging leaders.
- Demonstrated ability to write clear proposals, reports, budget narratives, personnel position descriptions and performance appraisals, and summary recommendations.
- Ability to work in close collaboration with the dean and associate deans to build the capacities of Extended Learning and enhance its essential excellence and distinction comprehensively as well as within each unit.
- Ability to work in a transparent and open working style and have a high level of professional integrity.
- Demonstrated record of setting and maintaining high professional standards and taking personal pride/responsibility for performance excellence in all roles.

3. **List machines, tools, equipment, and motor vehicles used in the performance of the duties**

- Standard office and communication equipment.

4. **List unique working conditions**

- Regular work schedule for this position is Monday thru Friday 8am to 5pm
- Occasional weekends and overnight travels

5. **Other Employment Requirements**

- The person holding this position is considered a 'mandated reporter' under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083 Revised July 21, 2017 as a condition of employment. **Limited Reporter**
- This position is a "designated position" in the California State University's Conflict of Interest Code. The incumbent in this position is required to file Conflict of Interest forms subject to the regulations of the Fair Political Practices Commission. This position is required to file the Form 700 under disclosure category: **2** (ref. CSU COI Designated Positions List)
- This position is subject to a background check including, but not limited to, employment verification, education verification, reference checks and criminal record checks. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for the position.
- Must participate in required campus trainings including, but not limited to, CSU's Sexual Misconduct Prevention training; Information Security Awareness Training; and CSU's Discrimination Harassment Prevention Program for Supervisors. Injury and Illness Prevention Plan (IIPP) Training

PHYSICAL EFFORT, MENTAL EFFORT AND ENVIRONMENTAL FACTORS:

Check the appropriate box for each of the following items which most accurately describes the extent of the specific activity performed by this employee on a daily basis.

PHYSICAL EFFORT

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
1. Sitting		X			
2. Standing		X			
3. Walking		X			
4. Bending (neck)	X				
1. Bending (waist)	X				
6. Twisting (neck)	X				
7. Twisting (waist)	X				
8. Crawling	X				
9. Climbing	X				
10. Reaching (above shoulder)	X				
11. Reaching (below shoulder)	X				
12. Walking on uneven ground	X				
13. Crouching					
14. Kneeling	X				
15. Balancing	X				
16. Pushing or pulling	X				

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
17. Fine manipulation	X				
18. Simple grasping	X				
19. Power grasping	X				
20. Lifting or carrying	X				
A. 10 lbs or less	X				
B. 11 to 25 lbs	X				
C. 26 to 50 lbs	X				
D. 51 to 75 lbs	X				
E. 76 to 100 lbs	X				
F. Over 100 lbs	X				
21. Keyboard use			X		
22. Mouse use			X		
23. Repetitive use of hands/arms	X				
24. Repetitive use of legs/feet	X				
25. Eye/hand coordination			X		

- 26. Driving cars, trucks, forklifts and other equipment
- 27. Being around scientific equipment and machinery

Yes	No
	X
	X

MENTAL EFFORT

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
1. Directing others					X
2. Writing			X		
3. Using math/calculations			X		
4. Talking					X
5. Working at various tempos					X
6. Concentrating amid distractions					X
7. Remembering names					X
8. Remembering details					X
9. Making decisions					X
10. Working rapidly					X
11. Examining/observing details					X
12. Discriminating colors					X

ENVIRONMENTAL FACTORS

	Number of hours/day				
	N/A	1-2	3-4	5-6	7+
1. Inside				X	
2. Outside	X				
3. Humid	X				
4. Hazards	X				
5. High places	X				
6. Hot	X				
7. Cold	X				
8. Dry	X				
9. Wet	X				
10. Extreme change of temp	X				
11. Dirty/dusty	X				
12. Exposure to gas, fumes or chemicals	X				
13. Odors	X				
14. Noisy	X				
15. Working w/others					X
16. Working around others					X
17. Working alone			X		