

Classification Description

Job Title: Assistant Vice President,
Financial Planning

Pay Grade: Administrator

Job Code: 4091

FLSA Status: Exempt

Job Purpose

Under administrative direction of the Vice President, Business Affairs and Technology/CIO, the Assistant Vice President (AVP), Financial Planning serves as the chief budget officer for Florida SouthWestern State College, including all campuses and educational centers. This position plans, organizes, and directs all activities related to budget development and monitoring, financial planning and analysis and capital planning to ensure accurate budgeting, strong financial performance, and a thorough understanding of revenues, expenditures, and industry standards. As the College's chief budget officer, the AVP oversees the budget and financial planning office and is responsible for leading the management, planning, analysis, execution, reporting, cost containment of, and accountability for College resources.

This position develops incentives to increase resources while managing costs, fosters innovation, and aligns financial strategies with the institution's strategic vision and goals. The AVP for Financial Planning plays a critical role in leading financial analysis, modeling and planning to clearly demonstrate resource availability, enabling administrators to implement plans that support the institutional vision.

The AVP for Financial Planning provides strategic and collaborative leadership, drawing on extensive financial management experience. This role is dedicated to using that expertise to advance the College's mission and highest priorities.

This position has regular interaction with stakeholders across the institution including, but not limited to, School Deans, Associate Deans, Department Administrators, and the Finance team. This is a College Administrator position on an annual contract.

General Responsibilities

Essential Functions

Recommends policies and procedures, and monitors the revenues and expenditures of all authorized budgets to support the growth of the College's resource base. This role ensures compliance with established policies, fulfillment of reserve requirements for designated units, and the responsible, mission-aligned use of funds.

Oversees and reviews the monthly and/or quarterly financial reports presented to the District Board of Trustees.

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Leads the annual budgeting process, ensuring that all stakeholders are fully engaged and supported to facilitate the timely development and communication of the budget across all levels of the organization.

Responsible for preparing the College's annual budget and operating plans for approval by the District Board of Trustees, the Florida Board of Education, and the Division of Community Colleges. This includes budget components related to student activity fees, auxiliary services, grants, construction, technology, financial aid, tuition and fees, wage and salary schedules, and investment policy.

Provides leadership and participates in the development, implementation and control of improvements to the College's budget system (Banner). Develops procedures and controls related to budget development, financial planning, and position control.

Periodically reviews the annual and mid-term College-wide budgets to analyze trends impacting budgetary needs. Evaluates actual and projected revenues and expenditures to ensure alignment with budget parameters and assesses budget adjustment requests, including written and oral analyses. Also reviews capital outlay requests and grant reports for accuracy and compliance.

Prepares revenue and expense forecasts, along with periodic updates, to ensure they reflect current conditions and enable the administration to anticipate financial needs.

Develops comprehensive financial analyses, projections, reports, and presentations; identifies trends and changes in the operational environment; and keeps administration informed of the budget status across the College's various funds.

Oversees preparation of monthly, quarterly, and ad hoc financial reporting, including comparative reports of GAAP operating results and financial position and variance explanations.

Oversees the preparation of federal, state, and local financial reports, such as the annual Cost Analysis Report, Student Activity Fee Report and Technology Expenditure Report.

Develops and implements strategic goals for assigned areas, ensuring alignment with the College's overall objectives. Establishes and implements policies and procedures to support these goals, and identifies key financial controls to ensure accurate reporting and compliance with established guidelines.

Provides leadership to employees responsible for coordinating and administering the College budget, departmental budgets, position control, grants, capital planning, and financial reporting. Offers guidance and promotes best practices in budget development, monitoring, and reporting to ensure effective financial management.

Plans and directs the recruitment, training development and evaluation of subordinates for areas of responsibility.

Collaborates with College administrators and executives to develop measurable service objectives and determine appropriate budgetary resource allocation to achieve those goals.

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Assists administrators and executives in the proper and effective use of the finance and budget system, develops end user training and reports, as necessary.

Analyzes legislative and Board of Education changes impacting the College's fiscal accountability and recommends policies and procedures to address these changes. Must be conversant with state-level officials on financial matters.

Oversees the development and maintenance of position budgets with the Human Resources Department; advises on personnel changes as to budget as needed.

Oversees and supports budget development and financial reporting of the Florida SouthWestern State Collegiate High Schools.

Researches special projects as assigned and prepares detailed financial analyses. Prepares financial analyses and budget reports for the management of Financial Planning, as needed.

Serves as a member of College-wide committees, as needed.

Provides strategic leadership and oversight for auxiliary operations, including campus card services, food and vending, bookstore services, student printing, events and conference services, and athletic facility usage.

Collaborates with internal departments and external vendors to ensure auxiliary services meet institutional goals, generate revenue, and deliver a high-quality customer experience.

Oversees budget development, forecasting, and financial performance tracking for auxiliary units to ensure fiscal responsibility and operational efficiency.

Leads initiatives to improve service delivery, increase operational efficiency, and integrates technology solutions across auxiliary operations.

Serves as a liaison between auxiliary services and key stakeholders, including students, faculty, staff, community partners, and vendors, to address needs and resolve issues.

Ensures compliance with institutional policies, contractual agreements, and applicable state and federal regulations in all auxiliary service operations.

Provides and maintains cellular telephone and high-speed internet technology services, which allows immediate accessibility to the College through text and voice messages by cellular phone, and responds as needed.

Performs other duties as assigned.

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These essential job functions are not to be construed as a complete statement of all duties performed; employees will be required to perform other job-related duties as required. An employee with a disability is encouraged to contact the Human Resources Office to evaluate the job in greater detail in order to determine if she/he can perform the essential functions of this job with or without reasonable accommodation.

Knowledge, Skills and Abilities

Minimum Qualifications

Master's degree from a regionally accredited institution of higher education in accounting, finance, business, public administration or a related field.

Six (6) years of progressive full-time professional experience and demonstrated success in entity-wide budget preparation and review.

Knowledge of the principles and practices of fund accounting. Experience related to short and long range capital planning and budgeting.

Demonstrated experience using a personal computer, office software such as MS Office and electronic mail.

Demonstrated ability to:

- Think critically and creatively, have a high standard of integrity, and be motivated to incorporate best practices into the organizational culture.
- Exhibit a thorough knowledge of policies, procedures, and outside regulations pertaining to the position.
- Possess a working knowledge of operational and fiscal analysis techniques.
- Take initiative and independently plan, organize, coordinate and perform work in various situations where numerous and diverse demands are involved.
- Anticipate, investigate, and analyze problems and address them proactively.
- Communicate effectively, both orally and in writing.
- Establish and maintain effective working relationships with faculty, staff, students and the public.
- Work in a fast-paced, demanding environment.
- Work independently and follow through on assignments.
- Exhibit solid organizational skills and be detail oriented.
- Work with a variety of constituencies and be willing to contribute to a team effort.
- Exercise discretion and good judgment at all times and in all contexts and maintain confidentiality.
- Work effectively with all constituencies of the College.
- Collect, organize, analyze and present information in a meaningful manner.
- Collaborate and be effective working with diverse populations.

Critical Skills/Expertise

All employees are expected to:

- Promote a common purpose consistent with stated College goals and demonstrate a commitment to students and the learning environment.
- Possess the knowledge of general written standards and procedures utilized, and have the ability to read, interpret, and follow procedural and policy manual related to the job tasks.
- Demonstrate the ability to respond to supervision, guidance and direction in a positive, receptive manner and in accordance with stated policies.
- Provide quality customer service by creating a welcoming and supportive environment.
- Present a professional image in word, action and attire.
- Demonstrate professionalism in dealing with a diverse population while understanding and respecting each other's view of the world, personalities and working styles.
- Conduct oneself in a manner consistent with the College's standards of ethical conduct.
- Apply effective techniques to create working relationships with others to achieve common goals; successfully communicates and collaborates with others to achieve goals.
- Demonstrate skills necessary to look at situations and processes critically to make recommendations for improvement.

Work Conditions/Physical Demands/Special Conditions

Physical: Routinely requires the ability to see, hear, and speak. Routinely requires sitting, bending, stooping, walking. On occasion, incumbents may be required to lift 20 or more pounds.

Environmental: Normal general office.

Mental: Routinely requires the ability to interpret, analyze and perform critical thinking skills.

Approved: May 28, 2024. Revised: August 6, 2025.