



## Associate Vice Chancellor, Academic Planning and Budget

The [University of California, Los Angeles](#) welcomes applications and nominations for the position of Associate Vice Chancellor, Academic Planning and Budget (AVC-APB).

### The University of California, Los Angeles

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As a preeminent public research university, UCLA's mission is the creation, dissemination, preservation, and application of knowledge for the betterment of our global society. UCLA was founded on the belief that a state and nation will thrive if all people — not just the privileged — have access to the opportunities for intellectual growth and personal empowerment that come with a college education.

Situated on 419 acres five miles from the Pacific Ocean, UCLA is enriched by the cultural diversity of the dynamic greater Los Angeles area as well as the geographic advantages of Southern California. UCLA is an international leader in breadth and quality of academic, research, health care, wellness, cultural, continuing education, and athletic programs, with nearly 47,000 students taught by approximately 5,400 faculty members in the UCLA College of Letters & Science and 12 professional schools. UCLA is consistently ranked among the top institutions nationally for research funding, having generated more than \$1 billion in research grants and contracts annually in 11 of the last 14 years. It also features regularly in rankings of the finest universities in the world.

In FY2023, total revenues approach \$11.2B, including over \$3.6B in Medical Center revenue, \$3.6B in patient care revenue, and nearly \$1.6B in sponsored research, making UCLA the largest campus in University of California in terms of financial footprint. UCLA's annual financial statements are available [here](#).

### Office of Academic Planning and Budget

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The Office of Academic Planning and Budget (APB) supports UCLA executive management and campus-level strategic planning and resource management by providing objective and timely data and analysis to inform central and unit decision-making. APB is a unit of the [Vice Chancellor-CFO](#), led by the University's Vice Chancellor & Chief Financial Officer, who reports to the Chancellor and the Executive Vice Chancellor & Provost. Reporting to the Vice Chancellor & CFO, the Associate Vice Chancellor, Academic Planning & Budget is responsible for all aspects of APB'S work.

APB comprises approximately 15 staff members. It provides objective, accurate, thorough, and timely analysis and information to enable effective decision-making across the university, to inform the allocation of resources against operational needs and strategic goals, to support administrative and academic leaders in effectively balancing unit-level and university-level interests, and to enable timely reporting on performance against key objectives and metrics. It acts as an advisor to the Chancellor in the allocation

and administration of all campus funds (over \$11B billion annually) to best strengthen the overall financial health and long-term execution of the university's mission. APB also supports strategic campus initiatives and programs by collaborating with campus leadership as the trusted provider of financial and business-plan analysis.

APB acts in an advisory role to the Chancellor and Executive Vice Chancellor & Provost in the allocation and administration of all campus funds. The AVC provides university leadership with insight and business plan analysis on an array of [Strategic Initiatives](#). In UCLA's shared-governance environment, the AVC consults with the Academic Senate on matters that impact the university's education mission. In addition, the office interacts with the University of California Office of the President (UCOP) to ensure that the campus resource base and its flexibility are maximized and that the campus academic performance and programs are accurately characterized in systemwide reports.

Working with academic and administrative units, APB plays a key role in providing guidance and support at the programmatic level. APB compiles data from official campus sources and generates institutional information and analyses used by the college, schools, and departments in program planning and resource management. Institutional data are also provided to accrediting organizations, federal departments, the state legislature, the UC Office of the President, and ranking agencies as part of the accountability reporting schedule.

In discharging these responsibilities, APB's staff work in three teams: Campus Budget Services, Financial Analysis & Decision Support, and the Office of Analytics & Institutional Research.

## Position Summary

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The AVC is responsible for driving the campus' annual budget process and its multi-year strategic financial planning, including the analysis of institutional resource and planning issues. The AVC serves as a key resource to the Chancellor, Executive Vice Chancellor and Provost, Vice Chancellors, Vice Provosts, Deans and other UCLA senior leadership through thorough analysis identifying and modeling key drivers of the university and providing recommendations and business analysis on alternative outcomes to influence the decision-making process and planning efforts. The AVC informs and enables the development of capital budgets and of effective and efficient reporting and analysis tools.

Under the general guidance of the Vice Chancellor/Chief Financial Officer, the AVC works independently to establish the department's strategies, policies, procedures, and controls. The AVC collaborates with and maintains productive relationships with senior academic and business leaders across the campus and consults with counterparts at other UC campuses and serves as a liaison with UCOP for budget, financial planning, and institutional analysis issues. The AVC directly supervises the department's leadership team and oversees the management of all APB staff.

The AVC contributes to the work of several committees (plus others as appropriate):

- The Council on Planning and Budget of the Academic Senate (*ex-officio* member)
- Academic Finance Officers' Council (guest/advisor)
- Space Oversight Committee
- Project Development Team

The AVC also works closely with the finance and budget leaders of important parts of the UCLA enterprise that operate with delegated authority. Chief among these are UCLA academic units, central administrative units such as Administration, [UCLA Health](#), and the [UCLA Foundation](#).

## Priorities

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- Provide expert guidance to campus constituents in a spirit of partnership and shared commitment to effective management of fiscal resources
- Become a trusted partner to, and position the APB unit as a trusted partner to, executive and business managers across the campus
- With university leader and business and finance partners across campus, establish a long-term financial framework for the university, the tools that enable managers to make strategic decisions about resource utilization within that framework, and the shared management practices needed to sustain a culture of effective institutional decision-making
- With the VC-CFO and other university leaders, lead the development and implementation of enhanced comprehensive and strategic models for the campus' operating and capital budgets that integrate fund flows from all revenue sources and that enable confident decision-making about all mission areas of the campus
- Contribute expertise and vision to university work on data strategy, policy, business intelligence best practices, security, and implementation in partnership with the Information Technology Services organization and other campus offices
- Contribute to the university's plans and preparation for the implementation of a new financial system and ensure the financial system aligns with desired budget processes and unit-level reporting, forecasting, and planning needs
- Leverage the expertise and engage the expectations of the UC Finance division of the UC Office of the President, particularly its Budget Planning & Analysis unit
- Engage the Academic Senate's Council on Planning & Budget and the Senate more broadly to enable it to play its advisory role in trust and confidence. Collaborate with the Academic Senate to establish and continuously refine institutional metrics to inform strategic planning and decision making.

See the Appendix, below, for a detailed account of the responsibilities and activities of the Office of Academic Planning & Budget.

## Competencies and Qualifications

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UCLA's new Associate Vice Chancellor for Budget Analysis and Planning will immerse themselves in a rich, complex, highly engaged academic community. They will bring many skills, attributes, and competencies to this community, chief among them deep domain expertise in budgeting and resource planning along with a set of values and behaviors that include emotional intelligence, empathy, judgment, integrity, perspective, and a commitment to diversity, equity, inclusion, and shared governance. They will have the ability to understand and support the mission, goals, objectives, and stakeholders of an R1 research university and to advise a wide range of campus colleagues on how effective budget planning and management can support and enhance teaching, research, and academic-support operations. They will have the initiative, patience, and persistence to build and sustain relationships across a decentralized management ecosystem that includes across schools, departments, and business units, all levels of campus

management, University of California Office of the President, other members of the university community, and external financial, educational, civic, and governmental groups.

Required Qualifications:

- 10+ years of progressive leadership experience in and/or leading a Financial Planning and Analysis organization focused on annual budget and long-term financial planning, and/or a finance/strategy role (including but not limited to corporate finance, strategic planning or management consulting) for a large, complex organization.
- Significant experience in the development of financial models to focus on measurement, analysis, and evaluation of fiscal drivers for large, complex programs and services.
- Demonstrated proficiency in GAAP, financial reporting and statement analysis, and forecasting and budgeting across operating income, balance sheet, and cash flows.
- Highly sophisticated skills in strategy development, systems planning, project management, and change management.
- Demonstrated ability to collaborate with stakeholders to conceptualize, develop, and implement broad institutional initiatives, policies and practices; experience working with stakeholders and partners who have varied levels of financial acumen.
- Demonstrated expertise in effective communication, both written and verbal, on complex managerial issues, including demonstrated ability to explain, advocate, persuade, and negotiate with other leaders and groups, both internally and externally.
- The ability to learn new areas quickly and to act or advise on the basis of sound judgment and appropriate consultation.
- Strong sense of service orientation with demonstrated ability to balance constituent service, controls, and compliance.
- Successful leadership experience building and managing a team of collaborative seasoned managers and technical professionals toward organizational goals and objectives (includes recruiting, retention and talent development).
- An undergraduate degree from an accredited institution.

Preferred Qualifications:

- Advanced degree in a related discipline (e.g., MBA or master's in finance, accounting, business administration).
- Knowledge of issues facing higher education and the basic tenets on which a public university is established.
- Experience with and broad knowledge of higher education business functions and revenue streams, State of California budget approval process, and California's [Master Plan for Higher Education](#).
- Active engagement at the national level in relevant professional communities; the presence to represent UCLA in these communities and to benefit from and contribute to their work at the forefront of budgeting, resource planning, and financial planning and analysis.
- Expertise in finance in a public/government setting, expressed as a deep knowledge of the management of financial resources to achieve organizational goals through investing, raising capital, debt capacity planning, cash management, FP&A activities, etc.
- General knowledge of health care finance.

## To Apply

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UCLA has retained [Opus Partners](#) to support this recruitment. Craig Smith, Senior Partner, and Thomas Lapierre, Senior Associate, are leading the search. Confidential inquiries, applications, and nominations should be submitted by email to Thomas Lapierre at [thomas.lapierre@opuspartners.net](mailto:thomas.lapierre@opuspartners.net). In order to be considered by the University's search committee, candidates must provide a CV/resume and a letter of introduction that addresses the specific responsibilities, expectations, and qualifications described above including the university's commitment to advancing diversity, equity, and inclusion. Please consult Opus Partners for more information about the application process.

*The University of California is an Equal Opportunity/Affirmative Action Employer advancing inclusive excellence. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, age, protected veteran status, or other protected categories covered by the UC nondiscrimination policy: <http://policy.ucop.edu/doc/4000376/NondiscrimAffirmAct>*

## Appendix: APB Responsibilities and Activities

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### Program Planning and Analysis

- Lead the Annual and long-term Financial Planning and Budget Process for the campus and business units.
- Maintain Financial Planning and Annual Budget model while managing the delivery of organizational and fiscal analyses.
- Advise the Chancellor, EVC & Provost, and the Vice Chancellor/CFO with respect to the evaluation of budget requests and recommendations for the resolution of campus organizations in administrative and/or fiscal distress in the best interest of the campus.
- Manage the process for securing state funding for facilities maintenance and purchased utilities.
- Provide support for academic planning, enrollment planning, program review, resource analysis, and other analytical studies for instructional, research, public service, administrative and student support services.
- Administration of the Faculty Renewal Model and related faculty resources, such as recruitment/retention, recall, and upgrading provisions.
- Administration of student-fee funds and analysis of related student-fee issues.
- Perform campus-wide analytical studies such as support-rate analysis, instructional equipment allocations and expenditures, and resource profiles and models (for example, the Professional School Restructuring Initiative).

### Financial Forecast/Resource Management

- Manage the administration of the UCLA General Fund budget, approximately \$1.3 billion annually, generated through state funding appropriations and undergraduate tuition.
- Consolidate business unit forecast/plans into the overall campus reporting to build a composite view of the university including net operating income, cash flow, and balance sheet impact. Conduct and publish quarterly variance to budget/plan analysis for senior campus leadership,

identifying and assessing key drivers of performance and updates to year-end projected results. Develop short and long-term resource projections, analysis & modeling of resource allocations or reductions and fund utilization strategies to maximize resource effectiveness.

- Advisory role to the Chancellor, EVC & Provost, and the Vice Chancellor/CFO in the forecast of campus performance to plan/budget and allocate all campus funds, over \$11 billion.
- Management of Chancellorial discretionary funds and commitments, campus extramural overhead funds, academic resources, and personnel action funding (academic and staff) such as turnover, employee benefit, range, and merit funding.
- Manage the operation of the UCLA Budget and Staffing Systems. Ensure new systems and system upgrades meet overall campus needs with appropriate controls.
- Responsible for the administration, recommendations concerning, and implementation of UC and UCLA budget policies and procedures.
- Manage the post-audit review of departmental budget and staffing adjustments and performance.
- Manage the fiscal year-end closing for state appropriations and other core institutional funds.
- Manage the preparation and submission of the annual University of California Regents Tables and implementation of University of California Presidential Allocations.
- Provide review, initial approval, and subsequent budget, rate, and performance review of all campus sales and service and General Fund recharge activities; develop new, simplified ways to ensure general services are funded by the campus.

#### Financial Planning & Analysis

- Assist units in the development of financial structures and analysis of their performance in relation to budget and future requirements.
- Manage the administration of the campus Short-term Investment Pool (STIP) policy.
- Manage activities associated with supporting campus strategic planning and decision making through the analysis, modeling, presentation, and distribution of institutional research data. This includes planning studies, acquisition and/or maintenance of data, advanced analytical and statistical assessment, and reporting related to the institution's students, academic and non-academic employees, programs, financial and other resources, and facilities.

#### Operational Research, Information Management, and Dissemination of Information

- Execute APB's advisory function on strategic issues and in support of senior leadership, with a particular focus on identifying drivers of academic and university business outcomes, supporting the development and growth of alternative revenue sources, business plan analysis, and identifying cost-efficiency opportunities.
- Ensure that UCLA's institutional responses to both internal and external information requests are consistent, accurate, and deal appropriately with the issues for which information is being sought. The university's systems of record house budget, financial, staffing, and payroll data; internal constituents include the Academic Senate.
- Additional enterprise data on which APB reports to campus constituents include:
  - Student Data: Used for attrition, persistence analysis, cohort studies, performance analysis, student flow statistics, enrollment forecasting and modeling, enrollment planning monitoring status of admission statistics for impact on enrollment target, diversity statistics, etc.

- Faculty Workload: Used for faculty course load analysis, faculty workload analysis, course enrollment and faculty workload patterns, academic resource planning, etc.
- Student Workload: Used for headcount and course enrollments, Student Credit Hour statistics, class size distributions, longitudinal data, etc.
- Space Inventory: Room and building inventory of volume, usage, funding. Used to support campus space planning, full-costing, and the Indirect Cost Rate calculation.
- Organizational Hierarchy: A component of the campus budget, financial, payroll and other systems which allows those activities to be linked in a manner that reflects the UCLA organizational structure, from the Vice Chancellor/Dean to the departmental level.