AUBURN
Human Resources

# Assoc Dir, Advancement Finance & Asst Treasurer

Job Description

## JOB INFORMATION

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|---|---|
| Job Code | OA56 |
| Job Description Title | Assoc Dir, Advancement Finance & Asst Treasurer |
| Pay Grade | FO13 |
| Range Minimum | $85,560 |
| 33rd % | $108,380 |
| Range Midpoint | $119,790 |
| 67th % | $131,200 |
| Range Maximum | $154,020 |
| Exemption Status | Exempt |
| Organizational use restricted to the following divisions | 109 Senior VP-Advancement |
| Approved Date: | 10/3/2025 11:09:37 AM |

## JOB FAMILY AND FUNCTION

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|---|---|
| Job Family: | Financial & Business Operations |
| Job Function: | Accounting & Finance |

## JOB SUMMARY

The Associate Director of Advancement Finance & Asst Treasurer provides daily oversight and management of the financial and budgetary operations for Auburn University Advancement and its institutionally related organizations. This role is responsible for ensuring compliance with Financial Accounting Standards Board (FASB) codifications, Council for Advancement and Support of Education (CASE) guidance, and Internal Revenue Service regulations. The position communicates financial implications, philanthropic gifts, scenario planning, and budgeting matters to various leaders and stakeholders, including governing boards, Advancement Leadership, Deans, financial liaisons, and other unit leaders. The role may be appointed to transact business on behalf of affiliated foundations and is responsible for oversight of payment and disbursement functions.

## RESPONSIBILITIES

- Provides leadership and operational oversight of financial management for institutionally related organizations, including stewardship of significant assets and annual philanthropic activity.
- Manages annual external audit and tax compliance processes, coordinating with external auditors and tax advisors, and ensuring accurate preparation and review of GAAP-compliant financial statements, IRS Form 990 filings, and supporting documentation.
- Supports senior Advancement Finance leadership and governing boards, and may perform duties of Treasurer and CFO in their absence.
- Oversees financial reporting cycles, delivering interim financial statements, monthly budget-to-actuals, and management reports to inform senior leadership and governing boards.
- Leads and develops a professional finance team, providing coaching, mentoring, performance management, and training to support operational excellence and succession planning.
- Conducts financial analysis and special projects, including the development of funding models, forecasting, and the preparation of board-level reports.
- Supports the development and consolidation of annual operating budgets and affiliated entity budgets, including forecasting, scenario planning, variance analysis, and preparation of board-ready budget packages.
- Administers cost allocation methodologies between institutionally related organizations and the university, ensuring compliance, transparency, and equitable distribution of shared services.
- Manages financial accounting systems, policies, procedures, and security access approvals for administrative systems.
- Drives process improvement initiatives to enhance efficiency and financial operations, and serves as a trusted advisor on budget planning, use of philanthropic resources, and financial policy interpretation.

## RESPONSIBILITIES

- Supervises disbursement and expense management processes, ensuring proper classification, adherence to policy, and compliance with tax reporting requirements.
- Provides leadership in the oversight and stewardship of philanthropic gifts to the university and affiliated entities.

The responsibilities listed above show the typical duties for jobs in this classification. Actual tasks may differ depending on the department's needs. Other similar duties may be assigned with discretion of the supervisor. Not every duty will apply to every position, and the amount of time spent on each task can change based on department needs.

## SUPERVISORY RESPONSIBILITIES

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|---|---|
| Supervisory Responsibility | Full supervisory responsibility for other employees is a major responsibility and includes training, evaluating, and making or recommending pay, promotion or other employment decisions. |

## MINIMUM QUALIFICATIONS

**To be eligible, an individual must meet all minimum requirements which are representative of the knowledge, skills, and abilities typically expected to be successful in the role. For education and experience, minimum requirements are listed on the top row below. If substitutions are available, they will be listed on subsequent rows and may only to be utilized when the candidate does not meet the minimum requirements.**

## MINIMUM EDUCATION & EXPERIENCE

| Education Level | Focus of Education | | Years of Experience | Focus of Experience | |
|---|---|---|---|---|---|
| Bachelor's Degree | in Accounting or Finance. | and | 6 years of | Experience in managing financial matters for an organization, which may include budgeting, financial statement and report preparation, research, forecasting, analysis and presentation of financial data. Experience must show progressively increasing levels of responsibility and accountability. Must have at least one (1) year of experience supervising or leading full-time employees. | |

## MINIMUM KNOWLEDGE, SKILLS, & ABILITIES

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|---|---|
| Knowledge of accounting and financial principles and policies. | And |
| Knowledge of financial statement preparation. | |

## MINIMUM LICENSES & CERTIFICATIONS

| Licenses/Certifications | Licenses/Certification Details | Time Frame | Required/ Desired | |
|---|---|---|---|---|
| Certified Public Accountant (CPA) | Certified Public Accountant (CPA) required. | Upon Hire | Desired | |

## REQUIRED PRE-EMPLOYMENT/ONGOING SCREENINGS

Financial History Check

## PHYSICAL DEMANDS & WORKING CONDITIONS

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|---|---|
| Physical Demands Category: | Other |

## PHYSICAL DEMANDS

| Physical Demand | Never | Rarely | Occasionally | Frequently | Constantly | Weight |
|---|---|---|---|---|---|---|
| Standing | | | X | | | |
| Walking | | | X | | | |
| Sitting | | | | | X | |
| Lifting | X | | | | | |
| Climbing | | X | | | | |
| Stooping/ Kneeling/ Crouching | | X | | | | |
| Reaching | | | X | | | |
| Talking | | | | X | | |
| Hearing | | | | | X | |
| Repetitive Motions | | | X | | | |
| Eye/Hand/Foot Coordination | | | X | | | |

## WORKING ENVIRONMENT

| Working Condition | Never | Rarely | Occasionally | Frequently | Constantly |
|---|---|---|---|---|---|
| Extreme cold | | X | | | |
| Extreme heat | | X | | | |
| Humidity | | X | | | |
| Wet | | X | | | |
| Noise | | X | | | |
| Hazards | | X | | | |
| Temperature Change | | X | | | |
| Atmospheric Conditions | | X | | | |
| Vibration | | X | | | |

**Vision Requirements:**

Ability to see information in print and/or electronically.