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Position #: (NUNC).... (E)
Developed by:....TEP; SG
Reviewed by:..... LB
Approved by:....RHL; LK
Date: 4/92, 10/95, 11/99,
1/03,2/05,1/15,2/17,11/18
11/19

UNIVERSITY OF RHODE ISLAND
Position Description

TITLE: Budget Specialist I, Financial Analysis

DIVISION: Administration and Finance (Budget & Financial Planning Office)

REPORTS TO: Associate Director or Budget Specialist III, Financial Analysis

GRADE: 10

SUPERVISES: May supervise and review the work of undergraduate students assigned to assist on specific projects

BASIC FUNCTION:

Under the direction of a designated staff member, assist in the following: Forecast, research and trend analysis; financial modeling; ERP query management; report writing related to budget preparation and submission; tracking expenditures and/or revenues; performing post-audit and other reviews of actual expenditures and/or revenues.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Under the direction of a designated staff member:

Develop budget recommendations for each budget cycle as required at the college/department/unit/program level, based on financial analysis.

Manage day-to-day budget execution, including the review and approval of budget modifications, and post audit of departmental expenditures.

Serve as liaison and resource to University departments and administrators regarding financial data and proper budget procedures and practices and resolve related problems.

Prepare program cost analyses, with recommendations to management for final decision making.

Participate in multiple, special, and confidential projects as assigned by the Director or Associate Director.

Research, analyze, and prepare *ad hoc* analyses/reports, and provide information. Provide short- and long-term forecasting, identifying areas of concern and recommending actions to alleviate potential adverse issues. Provide recommendations to be used in final decision making.

Research, compile, maintain, review, and revise annual reports for the Director and/or Associate Director. Participate in analysis of functional needs, data requirements, and sharing procedures.

Assist in the development of training manuals.

Assist in the development of PeopleSoft queries, including data gathering and processing, and respond to *ad hoc* requests from management.

Assist with a variety of technical tasks; for example, participate in upgrades and associated testing, and engage in the continuing review, definition, and analyses of functional needs, requirements, and business rules and processes associated with the Budget and Financial Planning Office which might result in the need for system enhancements or modifications.

OTHER DUTIES AND RESPONSIBILITIES:

Perform additional duties as required, including the duties of other staff positions in the office.

LICENSES, TOOLS AND EQUIPMENT:

Personal computers and printers; mainframes; word processing, database management and spreadsheet software; Microsoft Excel; calculators.

ENVIRONMENTAL CONDITIONS:

The incumbent is not substantially exposed to adverse environmental conditions.

QUALIFICATIONS:

REQUIRED: Bachelor's degree; Demonstrated experience with personal computers, including spreadsheet applications and skills in Excel; Demonstrated analytical and problem-solving skills; Demonstrated technical ability; Demonstrated ability to complete assignments on a timely basis; Demonstrated ability to provide clear and concise reports on a timely basis; Demonstrated strong verbal and interpersonal communication skills; Demonstrated proficiency in written communication skills; Demonstrated ability to work with diverse groups/populations; Demonstrated ability to work independently; Demonstrated ability to be detail-oriented; Demonstrated presentation skills; Demonstrated ability to be flexible; and, Demonstrated ability to work in a fast-paced setting.

PREFERRED: Bachelor's degree with major/focus in finance, economics, mathematics, statistics or management; Minimum of one year financial experience in a financial setting (including tracking and analyzing revenue and expenditure budgets and actual data); Demonstrated knowledge of Microsoft Excel functions, such as pivot tables and v-lookups; and, Demonstrated experience in enterprise resource planning systems (e.g., Oracle, PeopleSoft, Banner).

ALL REQUIREMENTS ARE SUBJECT TO POSSIBLE MODIFICATION TO REASONABLY ACCOMMODATE INDIVIDUALS WITH DISABILITIES.