

Job Code: 100889-2018  
Position #: (NUNC) (E)  
Developed by: Barrett  
Reviewed by: . .LK,SG  
Approved by:. . . .LK  
Date:12/13;1/14; 1/15;  
12/16; 5/18

**THE UNIVERSITY OF RHODE ISLAND**

**Position Description**

**TITLE:** Budget Specialist II, Financial Analysis

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

**REPORTS TO:** Associate Director, Budget & Financial Planning

**GRADE:** 12

**SUPERVISES:** May supervise and review the work of entry level Analysts, staff, interns, graduate and undergraduate students assigned to assist on specific projects

**BASIC FUNCTION:**

Perform forecasting, research analysis, and trend analysis. Participate in the compilation, control, and monitoring of the University's budgets. Track expenditures and/or revenues and perform post-audit and other reviews of actual expenditures and/or revenues. Assist in the evaluation and review of complex technical information and in the preparation of comprehensive analyses, plans, and reports on components of the University's budget.

**ESSENTIAL DUTIES AND RESPONSIBILITIES:**

Assist in the development and implementation of analytical approaches to decision making for critical budget proposals at the University level. Assemble information in order to assist in decision making (e.g., development of rubrics to be used by SBPC, analysis and presentation of survey results in various formats, etc.). Perform cost analyses. Participate in, coordinate, and assume responsibilities for multiple special and confidential projects as assigned by the Director or Associate Director.

Research, analyze and prepare *ad-hoc* analyses/reports, and provide information to the Director and/or Associate Director. 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.

Serve as a liaison and resource in the following capacities: 1) work as liaison and resource to campus community to assess and develop budget reporting needs; 2) as necessary, serve as liaison to various entities at the request of the Director and/or Associate Director.

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.

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Assist in the development of training manuals. Provide, as necessary, campus-wide training to the University's financial community with regard to the University's budgeting process, procedures and regulations.

Recommend to the Associate Director new University-wide reporting protocols and analytical tools.

Responsible for developing PeopleSoft queries to assist in data gathering and processing, and to respond to *ad hoc* requests from management.

Undertake 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.

Participate on various University committees and provide related budgetary, analytical, and technical support.

Represent the Director or Associate Director as required.

**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; calculators.

**ENVIRONMENTAL CONDITIONS:**

The incumbent is not substantially exposed to adverse environmental conditions.

**QUALIFICATIONS:**

**REQUIRED:** Master's degree in finance, economics, mathematics, statistics, management, public administration or related field, with a minimum of two years of demonstrated successful professional experience in financial management in a complex organization and experience in tracking and analyzing revenue and expenditure budgets and actual data, **OR** a Bachelor's degree with a major in finance, economics, mathematics, statistics, management, public administration or a related field, and a minimum of three years of demonstrated successful professional experience in financial management in a complex organization and experience in tracking and analyzing revenue and expenditure budgets and actual data, **OR** a Bachelor's degree or Master's degree with a minimum of seven years' experience in a complex financial office in an institution of higher education or a complex organization/company; Demonstrated experience with personal computers, including spreadsheet applications; Demonstrated skills in Excel and Access; Demonstrated experience with enterprise resource planning systems (e.g.

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Oracle, PeopleSoft, Banner); Demonstrated analytical and problem-solving skills; Demonstrated technical ability to react to complex *ad-hoc* requests; Demonstrated ability to provide clear and concise reports on a timely basis; Demonstrated strong oral and interpersonal communication skills; Demonstrated proficiency with 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 manage multiple projects simultaneously in a fast-paced work setting.

**PREFERRED:** Minimum one year of experience using the financial module for an enterprise resource planning system (e.g., Oracle, PeopleSoft, Banner); Demonstrated experience using statistical software (e.g., SAS, SPSS); Demonstrated experience using predictive modeling; Demonstrated knowledge of Microsoft Excel functions, such as pivot tables and v-lookups; Demonstrated experience in financial management in a complex organization; Demonstrated experience in tracking and analyzing revenue and expenditure budgets and actual data in a higher education institution or equivalent organization/industry; Demonstrated knowledge of state government and higher education operations, policies, and procedures; and, Demonstrated experience in the development of complex financial models.

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

4/27/15