

Job Template: Financial Analyst 1

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Analysis
Job Title	Financial Analyst 1
Job Category: P	Job Level: 4
FLSA Status: E	Job Code: B21000

P4: Level Standards

GENERAL ROLE

This level is accountable for directly providing service to any assigned work unit at the University. The service can focus on a single or a variety of job functions with varying degrees of independence. Positions at this level may supervise student or support employees.

Incumbents:

- Put into effect what is required by defined job duties and responsibilities following professional norms or established procedures and protocols for guidance.
- Alter the order in which work or a procedure is performed to improve efficiency and effectiveness.
- Recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure or practice.

INDEPENDENCE AND DECISION-MAKING

→ *Supervision Received*

- Works under direction.

→ *Context of Decisions*

- Decisions should involve selecting an approach from among alternatives, timing when certain tasks should be performed, determining how to best use available resources, and other similar choices.
- Decisions require more coordination and collaboration among different sources, taking into consideration the roles and impact on work outside the immediate organization.

→ *Job Controls*

- Has the latitude to make decisions on projects that they are accountable for delivering on.
- Free to plan and carry out all phases of work assignments.

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COMPLEXITY AND PROBLEM SOLVING

→ *Range of issues*

- Assignments are defined as less reoccurring or cyclical tasks, and primarily consist of development or refinement of programmatic or administrative objectives.

→ *Course of Resolution*

- Resolution and project completion require substantial planning and scheduling within the department in order to obtain and align resources when and where needed.

→ *Measure of Creativity*

- Problems are not amenable to strict technical resolution, requiring innovative thinking.

COMMUNICATION EXPECTATIONS

→ *Manner of Delivery and Content*

- Regularly provides information on finished materials to others.
- Diplomatically and effectively deliver information difficult to understand or in contrast with a student or customer's views.

SCOPE AND MEASURABLE EFFECT

- Incumbents may supervise a small homogenous department, with proportionate responsibility to perform daily responsibilities similar to the work of subordinate staff.
- Actions typically affect an individual, item, event, or incident, etc.
- Actions taken are generally done to meet reporting requirements or regulatory guidelines, or to satisfy internal checks and balances and/or existing standards.
- Incumbents are typically designated as a lead or frequently assigned project leadership roles within a specific administrative/programmatic function or specialty area.

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- Generally, have a more direct impact on a larger action or process, such as serving as an approver in a process, where the process is “owned” by a different work unit.

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Job Template

GENERAL SUMMARY

Assists with the control and allocation of departmental and/or University budgets through the utilization and maintenance of databases and applying budget controls.

REPORTING RELATIONSHIPS AND TEAMWORK

Works under general supervision of a supervisor or manager.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.

- Provides technical analysis to determine present and future financial performance.
- Organizes information from a variety of sources for use in analyzing future plans and forecasts.
- Analyzes and synthesizes information and designs and creates accurate and timely reports.
- Extracts, consolidates, and maintains data from multiple sources.
- Provides guidance for assigned departmental financial management activities.
- Reviews financial transactions for appropriateness and accuracy.
- Assists in preparing documents, providing analysis, and properly executing the annual budget process for assigned unit.
- Aggregate information from a variety of sources for use in analyzing financial plans and forecasts for the operating and capital budgets.
- Serves as a resource to fiscal staff and others regarding routine policies and procedures.
- Performs related work as required.

MINIMUM QUALIFICATIONS

- Bachelor's degree in related field.
- Four years of related experience.

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COMPETENCIES

Knowledge of:

- Basic budgeting principles and practices
- Policies and procedures governing the operation of the department
- Microsoft Office and related software applications

Skill in:

- Planning and organization
- Troubleshooting
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving and analysis

Ability to:

- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Resolve problems efficiently and effectively
- Maintain the confidentiality of information and professional boundaries
- Work under general supervision to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management

Job Template: Financial Analyst 2

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Analysis
Job Title	Financial Analyst 2
Job Category: P	Job Level: 5
FLSA Status: E	Job Code: B21001

P5: Level Standards

GENERAL ROLE

This level is accountable for serving in an advanced senior resource capacity in an area of specialization.

Incumbents:

- Serve in a subject leader and consultative capacity within an area of specialization.
- Serve in the most advanced capacity and frequently being assigned project leadership roles within a specific administrative/programmatic function or specialty area.

INDEPENDENCE AND DECISION-MAKING

→ *Supervision Received*

- Works under direction.
- Seeks approvals when significant changes to process steps are considered and additional resources for task completion are required.

→ *Context of Decisions*

- Decisions are driven by office/departmental policy and procedures.

→ *Job Controls*

- Free to plan and carry out all phases of work assignments.
- Has the latitude to make daily operational decisions.

COMPLEXITY AND PROBLEM SOLVING

→ *Range of issues*

- Issues tend to be operational in nature.

→ *Course of Resolution*

- Identifies issues and gathers facts.
- Must understand the smallest details of an assigned area.

Job Template: Financial Analyst 2

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Analysis
Job Title	Financial Analyst 2
Job Category: P	Job Level: 5
FLSA Status: E	Job Code: B21001

→ *Measure of Creativity*

- Problems are not amenable to strict technical resolution, requiring innovative thinking for resolution.

COMMUNICATION EXPECTATIONS

→ *Manner of Delivery and Content*

- Diplomatically and effectively deliver information difficult to understand or in contrast with a student or customer's views.

SCOPE AND MEASURABLE EFFECT

- Actions regularly affect a department or a project outcome with department/office impact.
- Actions generally have a direct impact on controlling such things as staff size and nature of work and scope of services.
- Performance results tend to relate to efficiency, fiscal practices and standing, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.

Job Template: Financial Analyst 2

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Analysis
Job Title	Financial Analyst 2
Job Category: P	Job Level: 5
FLSA Status: E	Job Code: B21001

Job Template

GENERAL SUMMARY

Monitors and prepares a department's budget and/or assists in the University's annual budget through establishing and applying budget controls, as well as generating and analyzing financial data for decision-making and planning.

REPORTING RELATIONSHIPS AND TEAMWORK

Works under limited supervision of a supervisor or manager.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.

- Provides guidance for assigned departmental financial management activities.
- Provides budget data for use in developing budget requests; responsible for ensuring the integrity and accuracy of data used.
- Assists with annual budget preparation process for assigned unit.
- Prepares special reports and financial data for use in analyzing policy and budget options and other administrative decision-making, often requiring the manipulation and understanding of various databases.
- Assists financial managers and decision makers in planning and evaluation efforts and identifies opportunities for reducing costs and improving performance.
- Determines impact of various budget options, utilizing large data sets.
- Reviews budget procedures for efficiency and effectiveness and recommends changes to supervisor.
- Serves as a resource to staff and others regarding routine policies and procedures.
- Performs related work as required.

MINIMUM QUALIFICATIONS

- Bachelor's degree in related field.
- Five years of related experience. Two years serving in as an advanced/senior team member or working as a project lead.

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Job Category: P	Job Level: 5
FLSA Status: E	Job Code: B21001

COMPETENCIES

Knowledge of:

- Budgeting principles and practices
- Policies and procedures governing the operation of the department
- Microsoft Office and related software applications

Skill in:

- Planning and organization
- Troubleshooting
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving and analysis

Ability to:

- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Resolve problems efficiently and effectively
- Effectively translate financial and analytical concepts to a wide variety of audiences
- Maintain the confidentiality of information and professional boundaries
- Work under general direction to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management

Job Template: Financial Analyst 3

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Analysis
Job Title	Financial Analyst 3
Job Category: P	Job Level: 6
FLSA Status: E	Job Code: B21001

P6: Level Standards

GENERAL ROLE

This level is accountable for serving in a highly advanced capacity in an area of specialization. The advanced resource capacity must be distinct from the regular or most common provision of work within the area of specialization. Positions at this level are not reflective of the majority of the workforce, but instead the most advanced functions within an area of specialization.

Incumbents:

- Serve in a subject leader and consultative capacity within an area of expertise.
- Set goals and objectives for team members to meet project initiatives and standards.
- Distribute project work.
- Evaluate and monitor the accuracy, quality, quantity, and timeliness to meet project milestones and objects.

INDEPENDENCE AND DECISION-MAKING

→ *Supervision Received*

- Works under direction.
- Seeks approvals when significant changes to process steps are considered and additional resources for task completion are required.

→ *Context of Decisions*

- Decisions are driven by departmental policy and procedures.
- Incumbents understand the smallest details of an assigned area.

→ *Job Controls*

- Free to plan and carry out all phases of work assignments, including the oversight of project staff.
- Has the latitude to make daily operational project decisions.

COMPLEXITY AND PROBLEM SOLVING

→ *Range of issues*

Job Template: Financial Analyst 3

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Analysis
Job Title	Financial Analyst 3
Job Category: P	Job Level: 6
FLSA Status: E	Job Code: B21001

- Issues are readily identified but cannot be understood and fixed in simple cause-effect terms.
- Variables affecting the problem are generally known.

→ *Course of Resolution*

- Utilizing an understanding of best practices and the way similar units run elsewhere, convincingly recommends, develops, and implements capital and process improvements to the area.

→ *Measure of Creativity*

- Problems require integrative solutions such as how technologies, processes, resources, and people all fit together

COMMUNICATION EXPECTATIONS

→ *Manner of Delivery and Content*

- Deliver statements and information in a combined persuasive and motivational fashion to subordinate staff, departmental and University administrators, and the campus community as a whole.

SCOPE AND MEASURABLE EFFECT

- Serve as a lead over major projects within a specific administrative/programmatic function or specialty area requiring specialized education.
- Actions regularly affect a department or an office-centric outcome with departmental impact.
- Actions generally have a direct impact on controlling such things as nature of work and scope of services.
- Actions may have high-risk financial, compliance, political or safety implications.
- Performance results tend to relate to efficiency, degree of waste/cost overruns, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.

Job Template: Financial Analyst 3

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Analysis
Job Title	Financial Analyst 3
Job Category: P	Job Level: 6
FLSA Status: E	Job Code: B21001

Job Template

GENERAL SUMMARY

Facilitates the preparation of a department's budget or participates in the preparation of the University's annual budget document, establishes proper budget controls and maintains, generates and analyzes financial data for decision-making and planning by key University administrators.

REPORTING RELATIONSHIPS AND TEAMWORK

Work under direction of a supervisor or manager. Serves a lead worker to employees who perform similar functions.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.

- Act as the primary resource for assigned departmental contacts with regard to all financial management activities.
- Develops and summarizes findings regarding financial plans, operating forecasts, and/or similar complex financial matters. Provides recommendations to leadership.
- Work collaboratively to understand business requirements, conceptualize, develop, and execute financial models in support of strategic programs and initiatives.
- Anticipate, identify, and report potential financial opportunities, issues, risks, ideas, and solutions.
- Keep abreast of developments and trends that may require new studies or modification of current projects or practices.
- Guides and collaborates with peers, both internally and externally, to gather, analyze, summarize, prepare, and present recommendations regarding financial plans, trending future requirements, operating forecasts and/or similar complex financial matters.
- Prepares quarterly and ad-hoc reports for University leadership and various State agencies.
- Influences, plans, and designs methods to improve practices, processes, and systems. Leads and partners with all levels of internal and external contacts to execute departmental and/or institutional level goals.

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Occupational Group	Administrative Services
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Job Path	Financial Analysis
Job Title	Financial Analyst 3
Job Category: P	Job Level: 6
FLSA Status: E	Job Code: B21001

- Assists in preparing the department and/or University's budget, including analysis of individual unit budgets and developing updated forecasts.
- Serves as a resource to University departments and administrators regarding financial data and proper budget procedures and practices and resolves related problems. Serves as a resource to department staff to resolve problems and provide technical assistance and advice.
- Performs related work as required.

MINIMUM QUALIFICATIONS

- Bachelor's degree in related field.
- Six to seven years of related experience. One year serving as a senior team member regularly performing the most advanced tasks of the work unit and other team members

COMPETENCIES

Knowledge of:

- Budgeting and accounting principles and practices
- Policies and procedures governing the operation of the University
- Microsoft Office and related software applications

Skill in:

- Planning and organization
- Troubleshooting
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving and analysis

Ability to:

- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Solve complex financial problems
- Execute financial models in support of strategic programs and initiatives.
- Effectively translate financial and analytical concepts to a wide variety of audiences.

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- Maintain the confidentiality of information and professional boundaries
- Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management.

Job Template: Senior Financial Analyst

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Analysis
Job Title	Senior Financial Analyst
Job Category: P	Job Level: 7
FLSA Status: E	Job Code: B21003

P7: Level Standards

GENERAL ROLE

This level is accountable for serving in an expert resource capacity in an area of specialization. Positions at this level are not reflective of the majority of the workforce, but instead the most complex functions within an area of specialization.

Incumbents:

- Serve in a subject leader and consultative capacity within an area of expertise.
- Provide analytical, technical, and advisory support to leaders and decisions makers within the same disciplinary track.
- Lead projects or initiatives within the specific area of expertise, to include leading vendors or cross-functional departments or teams.
- Research and apply better ways to effectively achieve end results by, for example, arranging/rearranging the way work is performed, changing elements of processes, and adding or deleting new or unnecessary capabilities/functionalities as needed.
- Set project objectives, immediate- and/or long-term, as a means to fulfill project initiatives.

INDEPENDENCE AND DECISION-MAKING

→ Supervision Received

- Works under general direction.
- Seeks assistance only when unique situations arise, coupled with financial impact to the division and political consequence.

→ Context of Decisions

- Work is focused on and regulated by specific department/division goals and milestones.

→ Job Controls

- Act based on own judgement as long as actions adhere to division policies and operating procedures, and remain focused on the department and division objectives and missions.
- Subject to managerial controls through conferences, review of reports, and occasional on-site visits or check-ins.

Job Template: Senior Financial Analyst

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Analysis
Job Title	Senior Financial Analyst
Job Category: P	Job Level: 7
FLSA Status: E	Job Code: B21003

- Managerial controls are exercised on the incumbent for matters of intermediate- and long-range planning, budgetary, and human resources based matters.

COMPLEXITY AND PROBLEM SOLVING

→ Range of issues

- Problems are unique and unexpected.
- Challenges for problems arise due to lack of precedent.

→ Course of Resolution

- Problems require response/adaptation to changing conditions or circumstances, necessitating enterprise and new approaches with broad impacting effects.
- Problem resolution should regularly require collaboration and coordination with units internal to the division, with occasional collaboration and coordination outside the division.

→ Measure of Creativity

- Incumbents are regularly required to develop new methods/methodology for evaluation and implementation plans for new initiatives.

COMMUNICATION EXPECTATIONS

→ Manner of Delivery and Content

- Deliver statements and information in a combined persuasive and motivational fashion to subordinate staff, departmental and University administrators, and the campus community as a whole.

SCOPE AND MEASURABLE EFFECT

- Serve as an expert on specific subject matter evidenced by regularly researching and producing reports (e.g., white papers) on technical matters of systematic importance and consulting with managers throughout the division/University on specific issues in the position's area of expertise.
- Actions regularly affect a departmental outcome with division-wide impact.

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Occupational Group	Administrative Services
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Job Path	Financial Analysis
Job Title	Senior Financial Analyst
Job Category: P	Job Level: 7
FLSA Status: E	Job Code: B21003

- Actions have a direct impact on controlling such things as project scope, team size and nature of assignments, operating budget, etc.
- Actions may have high-risk financial, compliance, political, or safety implications.
- Performance results tend to be related to efficiency, degree of waste/cost overruns, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.

Job Template: Senior Financial Analyst

Occupational Group	Administrative Services
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Job Path	Financial Analysis
Job Title	Senior Financial Analyst
Job Category: P	Job Level: 7
FLSA Status: E	Job Code: B21003

Job Template

GENERAL SUMMARY

Provides strategic financial leadership to support senior leaders with operating and capital budget development and management, financial reporting and financial analysis, and provides broad-based support to managers in academic and non-academic units with a focus on University-wide financial goals and department-specific business initiatives requiring comprehensive knowledge of sound financial management practices and principles.

REPORTING RELATIONSHIPS AND TEAMWORK

Works under general direction of a manager. Serves as a lead to professional and non-professional staff, as well as over specialized business and/or administrative operations.

ESSENTIAL DUTIES AND RESPONSIBILITIES

The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.

- Provides direct support to the Office of the Vice President & Chief Financial Officer, Office of Budget, Planning and Institutional Research or the Office of Financial Operations and Controller regarding any facet of the University's budget and/or financial operations. Performs complex financial management activities, planning and analysis to support decision making. Provides leadership with findings of complex analysis in a clear and concise manner while providing alternatives and offering suggestions.
- Applies advanced analytical skills to analyze and resolve a wide range of highly complex financial issues; mines financial data and analyzes industry benchmarks and trends through the application of best methods and financial models; makes decisions or offers recommendations based on pertinent research work and analysis.
- Consults with and provides specialized advice to senior administrators (e.g., CFO, VPs, AVPs, Deans, Directors) and financial leaders (e.g., financial managers) throughout the University to structure, develop and manage their respective division budgets. Provides direction and guidance to other staff for all matters relating to daily and long-term budget development and financial planning activities.
- Produces and communicates comprehensive financial information, analyses, statements summaries and organized reports on the current and projected future financial status of units. Evaluates data and uses clear and precise language in the preparation of written

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reports of findings to quantify and illustrate complex comparisons, impact studies, sophisticated financial models or convey decisions. May conduct legal research with evidence-based findings to prepare memoranda for issuance to supervisor.

- Identifies trends affecting finances, budget needs and forecasts; reviews information and submittals for completeness and conformance with regulations and policies. Collaborates with financial managers and others to ensure that proposed adjustments are made in accordance with program objectives, changes and requirements.
- Oversees the work of and supervises assigned staff responsible for providing financial and budgetary support and special projects associated with the Office of the Vice President & Chief Financial Officer or the Office of Budget and Planning; provides direction, guidance, and support to other University employees; represents the unit and leads projects and associated resources.
- Serves as a primary resource and works collaboratively with internal units, cross functional departments and teams; acts as a University liaison and coordinates with external units, vendors and other government offices. May act on behalf of and serve as supervisor's designee, as authorized.
- Performs cost-benefit analyses to compare programs, achieve optimal performance and profitability, review financial requests, explore alternative financing methods, or improve efficiencies.
- Researches, compiles, and analyzes accounting and other data to determine the financial resources required to implement program, meet objectives and/or effectively achieve financial results; creates regular and ad hoc reports and presents financial information to assist senior administrators, financial managers and state agencies meet their business needs and ensure compliance with policies and procedures.
- Improves overall University financial analytical capabilities and reporting; creates, implements, and distributes financial management tools for reporting, analysis, and modeling; develops financial models.
- Performs related duties as required.

MINIMUM QUALIFICATIONS

- Bachelor's degree in finance, accounting, business, or related discipline.
- 8 years related accounting/financial experience. One year serving as a senior team member regularly performing the most advanced tasks of the work unit and other team members.

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OR

- Master's degree in finance, accounting, business, or related discipline or CPA.
- 6 years related accounting/financial experience. One year serving as a senior team member regularly performing the most advanced tasks of the work unit and other team members.

COMPETENCIES

Knowledge of:

- Budgeting, accounting and financial management practices and principles
- Policies and procedures governing the operation of the University
- Microsoft Office and related software applications

Skill in:

- Budget development, financial planning and analysis, and reporting
- Developing business models to achieve optimal operating performance and profitability.
- Developing and maintaining effective working relationships with all levels of management and University constituents
- Critical thinking, problem solving and business analysis

Ability to:

- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Resolve highly complex financial problems that have financial implications.
- Execute financial models in support of strategic programs and initiatives.
- Effectively translate financial and analytical concepts to a wide variety of audiences.
- Maintain the confidentiality of information and professional boundaries
- Independently analyze available information, formulate questions, draw conclusions, understandings and make recommendations, and present such conclusions effectively to senior management