

Class Code:.....0870
Position#:(NUNC)..108540
Developed by:.....LB
Reviewed by:.....SG
Approved by:.....LK
Date:..10/04; 5/10; 9/10

UNIVERSITY OF RHODE ISLAND
Position Description

TITLE: Business Analyst, Budget & Financial Planning Office
DIVISION: Administration and Finance
REPORTS TO: Director, Budget and Financial Planning
GRADE: 10
SUPERVISES: Student Personnel

BASIC FUNCTION:

Responsible for assisting the Director, Budget and Financial Planning in operational and financial matters pertaining to the administration of the University's budget.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

Coordinate financial matters pertaining to the administration of the Office of Budget and Financial Planning with other appropriate University departments and with the Office of Higher Education. Assist the Director, Budget and Financial Planning in the development and management of the University's budget process, and in office procurement and office management.

Receive, file and review all financial status reports as required. Research and compile information and make recommendations required for use in impact statements and analyses, presentations, meetings and decision making. Prepare and report project budgets, business plans and cash flow analysis using computer-based financial models. Forecast long-term trends and update projections after consultation with the Director, Budget and Financial Planning.

Assemble necessary information and assist in the preparation of annual budgetary requirements for the University's budget. Compile budget and personnel data spreadsheets for use by superiors in their analyses for the Budget Request, Budget Allocation, Mid-Year Review, and Year-End Analysis. Provide monthly briefings of accounting and financial status to the Director.

Reconcile budget and accounting records of various chartfield strings to insure proper utilization of allocated budget funds. Serve as assistant to the Director, Budget and Financial Planning and all departmental office staff for various reports and ad hoc projects.

Business Analyst, Budget & Fin'l Planning Office (NUNC - 0870)

Page 2 of 3

Draft complex budget documents and correspondence for the Director and the Associate Director, Budget and Financial Planning.

Prepare reports and budget submission items to the Office of Higher Education, the Legislature; respond to requests for information from the Office of Higher Education.

Prepare Power Point presentations and other reports using spreadsheet software, particularly Excel. Assist with compiling data for these and other presentations.

Participate in the preparation of data for the Board of Governors (BOG), Office of Higher Education (OHE), Executive and Legislative branches of State government, for senior management, and for various committees and/or councils as required. This may include taking electronic minutes at various meetings, and preparing minutes for distribution/approval.

Responsible for obtaining information and recommendations relating to specific problems, activities, or policies.

Provide the Director and the Associate Director with data and analysis relating to regular and *ad hoc* reports/projects.

Supervise clerical and other support staff as required; oversee the preparation and processing of both routine and important/complex correspondence.

Handle information of a sensitive and confidential nature.

Serve as liaison to all customers.

OTHER DUTIES AND RESPONSIBILITIES:

Provide Web-based development, maintenance and training to the staff in the Budget and Financial Planning Office as required.

Take electronic minutes at all Strategic Budget and Planning council Meetings, serve as staff support to the Council, update and post material to the Strategic Budget and Planning Council Website.

Perform additional duties as required.

LICENSES, TOOLS AND EQUIPMENT:

Personal computers, printers; word processing, database and spreadsheet software.

ENVIRONMENTAL CONDITIONS:

This position is not substantially exposed to adverse environmental conditions.

QUALIFICATIONS:

REQUIRED: Bachelor's degree; a minimum of three years' experience in a complex staff support position with responsibility for budgets, and which includes experience with business tracking systems and preparation of year end reports; experience using Microsoft Office, including Access and spreadsheet applications, PowerPoint, and Word; experience using Microsoft Office, including ACCESS and spreadsheet applications, PowerPoint, and Word; experience using graphics and presentation software to create complex and in-depth presentations and reports; experience with Adobe Creative Suite, including Web design; demonstrated ability to understand budgetary concepts; experience preparing cash flow projections; strong mathematical and analytical skills; strong interpersonal skills and ability to communicate effectively verbally and in writing; demonstrated ability to organize, coordinate, and supervise staff; demonstrated ability to coordinate complex management tasks, to work independently, and to balance multiple priorities; ability to interpret institutional policies, plans, objectives, rules, and regulations, and to communicate the interpretation to others.

PREFERRED: Three years of work experience in a financial setting; experience with financial and human resource systems (e.g., Oracle, PeopleSoft).

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