

ISSUED: 12/95

TITLE: Budget Analyst II

SALARY

SCHEDULE: B

6/93 & 7/90  
CLASS

CODE: PN306

UNION: P&A, Local 1979, U.A.W.

SALARY

GRADE: 11

EEO

CODE: 30

FLSA: Non-Exempt E-CLASS: PN

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**POSITION PURPOSE**

Develop, monitor and maintain moderate to large operating accounts in support of an assigned unit. Forecast and analyze expenditures and revenues to maintain financial control and accountability for major budgeting operation.

**ESSENTIAL JOB FUNCTIONS**

- Review and authorize large dollar volume expenditures and revenue collection to ensure budgetary appropriateness and fund availability. Monitor and control expenditures to ensure transactions are in compliance with policies and procedures. Review Financial Management System (FMS/BAR) for account balances; Human Resource System (HRS) for personnel items; account files for grant budgets and agency guidelines.
- Prepare annual budget requests. Assist and participate in University General Fund Budget submission. Forecast expenditures and revenues to project funding requirements needed for efficient allocation of resources. Perform variance analysis to identify inefficiencies with regard to spending and collection practices. Analyze monthly accounting reports and project expenses and budget estimates.
- Oversee and participate in maintenance of position roster. Initiate, authorize and monitor budget transfers. Review and grant budgeting approval of personnel actions; determine availability of budget funds necessary to maintain position and budget control. Conduct deficit monitoring and clearance of general fund, designated, auxiliary and indirect cost funds; review and interpret financial, commitments.
- Compile statistical data and prepare detailed computerized financial reports and analysis necessary for budgeting and planning needs. Maintain financial records and internal computerized databases in order to generate a variety of adhoc budget reports and tracking mechanisms.
- Serve as resource person and liaison to departmental administrators, principal investigators, outside vendors and other officials to explain budget management procedures, the Financial Accounting System (FAS), granting agency guidelines, and University policies and procedures. Review budgetary forms and documents to ensure adherence to established budgeting procedures and requirements as well as granting agency guidelines and regulations.

THIS DESCRIPTION IS INTENDED TO INDICATE THE KINDS OF TASKS AND LEVELS OF WORK DIFFICULTY THAT WILL BE REQUIRED OF POSITIONS THAT WILL BE GIVEN THIS TITLE AND SHALL NOT BE CONSTRUED AS DECLARING WHAT THE SPECIFIC DUTIES AND RESPONSIBILITIES OF ANY PARTICULAR POSITION SHALL BE. IT IS NOT INTENDED TO LIMIT OR IN ANY WAY MODIFY THE RIGHT OF ANY SUPERVISOR TO ASSIGN, DIRECT AND CONTROL THE WORK OF EMPLOYEES UNDER THEIR SUPERVISION. THE USE OF A PARTICULAR EXPRESSION OR ILLUSTRATION DESCRIBING DUTIES SHALL NOT BE HELD TO EXCLUDE OTHER DUTIES NOT MENTIONED THAT ARE OF SIMILAR KIND OR LEVEL OF DIFFICULTY.

- Provide functional supervision to subordinate clerical and technical personnel. Train in appropriate bookkeeping and accounting principles and methods. Answer questions and resolve problems as needed.
- Oversee and participate in special projects which involve generating management information reports and interfacing with various internal and external administrative offices and departments.
- Perform related work as assigned.

### **ADDITIONAL COMMENTS**

This intermediate classification level performs work which requires sufficient knowledge and skill in financial analysis and budgeting. This classification level is generally responsible for participating in the analysis and development of financial data which includes budget control and forecasting. Work activities require handling financial details for a large number of complex general fund, grant, designated, auxiliary and indirect cost accounts. In addition, this level has the authority to review and approve a large dollar volume of expenditures, initiate budget transfers and maintain position control. The incumbent is expected to exercise considerable independent judgment in resolving a variety of problems which may arise. This classification is generally assigned to a Division, School or College of the University having a large complex operating budget. This classification reports to and receives work direction from a management level position.

### **MINIMUM QUALIFICATIONS**

- Graduation from an accredited college or university with major coursework in business administration, accounting, finance or related field or an equivalent combination of education and/or experience.
- Reasonable knowledge of accounting, finance or budgeting principles and practices.
- Strong analytic and problem solving skills.
- Strong statistical background.
- Reasonable practical work experience with computer applications, computerized accounting systems and spreadsheet design.
- Ability to communicate effectively with others.
- Excellent oral and/or written communication skills.
- Ability to prepare varied financial statements, reports and analyses.
- Reasonable knowledge of University policies and procedures.
- Some knowledge and experience of the University's Financial Management System (FMS/BAR), Human Resource System (HRS) and Focus and/or Access programming language.
- Some knowledge or experience with interpreting and application of granting agency guidelines.
- Ability to prepare standard financial statements, reports and analysis.
- Typically, incumbents have held positions such as Budget Analyst I, Accounting Specialist, Accounting Assistant, Sr., etc.