

ISSUED: 2/96

TITLE: <u>Budget Analyst III</u>	SALARY SCHEDULE: <u>B</u>	6/93 & 7/90 CLASS CODE: <u>PN307</u>
UNION: <u>P&A, Local 1979, U.A.W.</u>	SALARY GRADE: <u>12</u>	EEO CODE: <u>30</u>
	FLSA: <u>Non-Exempt</u>	E-CLASS: <u>PN</u>

POSITION PURPOSE

Coordinate and lead in the preparation, development, implementation and modification of the University budget by compiling data and performing complex analysis and interpretation of fiscal data for budget control and forecasting purposes.

ESSENTIAL JOB FUNCTIONS

- Compile and provide data for use in the preparation of fiscal projections and related reports. Apply formula and models and provide information for scheduled reports and special projects as requested. May be required to develop and modify models in order to provide current, relevant data and to research standards and measures in order to make recommendations regarding the appropriate use of resources.
- Provide assistance to administrators in the interpretation and implementation of budgetary policy and procedures in order to ensure compliance with established University controls. Serve as a liaison to all School, College and Division administrators advising on budgetary matters and reviewing and processing to budget procedures.
- Identify and interpret sources of relevant data for use in budget formula calculations and comparisons. May be required to perform in-depth analysis, on a project basis, of unique problems and developments which arise or are assigned during the fiscal year to provide budget recommendations, justifications and projections or a re-examination of existing methodology used for current budget development.
- May be required to develop, recommend and modify budget policies and procedures to improve the ability to departments and the University to more efficiently administer the allocation of its finite resources. This could include the analysis of the effect of proposed changes, the preparation of recommendations to appropriate University officials, and the notification to be affected members of the University.
- Compile and provide information and data regarding budget and account activities, personnel rosters and budget documents. May monitor and reconcile budgets, accounts and rosters and review related activities for compliance with established policy and procedure.
- 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.

- Develop and conduct presentations in support of budgetary analysis and provide recommendations. Attend budget hearings, research and respond to inquiries and develop issue statements. Participate in various special projects that require compiling and analyzing data for report preparation.
- Coordinate and participate in the preparation and completion of several annual federal and state surveys (i.e., Heidi, IPEDS, State Operating Budget Requests, etc.); collect and analyze data; prepare spreadsheets, data tables, written reports and graphic presentations as needed; interface with other University departments and outside agencies in submitting data in a timely manner.
- Prepare, update and review the Budget Development Planning Package; answer questions, investigate problems and summarize relevant issues. Assist in the preparation of the General Fund Budget Load package; create/revise budget planning materials; conduct training sessions; review all School, College and Division calculations; ensure all positions are funded appropriately given the budgetary policy.
- Perform related work as assigned.

ADDITIONAL COMMENTS

This senior classification level is responsible for designing standards and models for the justification of University budget levels. Incumbents work independently on projects which often require the ability to use creative means to develop fiscal analysis and proposals. Work activities necessitate close interaction with University officials, administrators and business offices to develop and implement budgetary policies and procedures which reflect and support University priorities and establish effective goals. Work activities involve considerable independent analysis; the ability to make projections, forecast and understand trends; conduct cost/benefit assessment; create and manage large internal spreadsheets. This classification is generally assigned to a Division, School or College at the University having a 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 work experience.
- Considerable knowledge of the principles and practices of governmental budgeting techniques and ratio analyses.
- Considerable experience in budget and program analysis.
- Considerable practical work experience with computer applications, computerized accounting systems, spreadsheets graphic packages and data analysis.
- Considerable knowledge of University policies and procedures.
- Strong analytical and problem solving skills.
- Ability to communicate effectively with others.
- Some knowledge of the University's Financial Management System (FMS/BAR), Human Resource System (HRS) and FOCUS and/or Access programming language.
- Considerable experience in data gathering, data analysis and data presentation.
- Excellent oral and/or written communication skills.
- Ability to organize and prioritize assigned tasks; to manage multiple deadlines and perform assignments within a fixed timetable.
- Typically, incumbents have held lower level Budget Analyst positions.