

## Job Family Matrix

<b>Job Function:</b> Finance		<b>Job Family:</b> Financial Planning and Analysis - Professional	
<b>Job Family Summary:</b> Perform or manage a range of analytical, problem solving and evaluative work in support of the university's financial management. Work includes collecting and analyzing data, formulating and evaluating alternative solutions, and preparing reports.			
<b>Job Title:</b> Financial Analyst II		<b>Job Title:</b> Financial Analyst III	
<b>Job Code:</b> F0956P		<b>Job Code:</b> F0957P	
<b>Grade Level:</b> 56 <b>Exemption:</b> Exempt		<b>Grade Level:</b> 57 <b>Exemption:</b> Exempt	
<b>Effective/Revision Date:</b> January 2017		<b>Effective/Revision Date:</b> January 2017	
<b>Job Summary</b>		<b>Job Summary</b>	
Independently perform financial analysis to support department's role in assisting management with financial planning efforts, budget analysis and monthly reporting.		Independently perform diverse financial analysis for a school/unit and assist department management with their financial planning efforts, budget analysis and monthly reporting.	
<b>Core Duties</b>		<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• Perform a variety of financial analyses that identify trends and recommendations to help inform decision making</li> <li>• Assist with the annual budget process; assist with multi-year forecasts</li> <li>• Produce financial reports, including, annual, monthly, quarterly, and ad hoc</li> <li>• Act as a resource for departments on transactional inquires and financial/budgetary questions that require problem-solving and analytic capability</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>		<ul style="list-style-type: none"> <li>• Conduct complex financial analysis and update financial models and projections</li> <li>• Analyze and project budgets and financial activity for multiple programs</li> <li>• Provide technical advice and problem resolution for a school/unit financial community</li> <li>• Enhance, produce and distribute unit-specific planning materials; develop and produce materials to facilitate annual budget planning and financial monitoring of budget-to-actuals at the local level</li> <li>• May consolidate local budgets to facilitate the upload process</li> <li>• Review financial data and explore options for report development within University financial applications</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	
		<ul style="list-style-type: none"> <li>• Provide analytical and quantitative analysis to support decisions related to the preparation of the annual budget, mid-year forecasts and multi-year financial plans</li> <li>• Develop reporting for use in financial planning</li> <li>• May function as subject matter expert and/or project lead</li> <li>• Advise unit/school on financial questions (e.g., endowment planning, sponsored awards, and capital planning considerations) in support of financial processes</li> <li>• Design and deliver presentations that educate School leadership on key financial issues</li> <li>• Work closely with other groups within the school/unit finance area to better understand University-wide financial management issues that inform planning, reporting and analysis</li> <li>• Provide staff mentoring and training</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	

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Basic Qualifications	Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> <li>Bachelor's degree or equivalent work experience required</li> <li>Minimum of 3 years' relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>Bachelor's degree or equivalent work experience required</li> <li>Minimum of 5 years' relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>Bachelor's degree or equivalent work experience required</li> <li>Minimum of 7 years' relevant work experience</li> </ul>
Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>Knowledge of Microsoft Office Suite, intermediate Excel skills</li> <li>Working knowledge of budget management, financial analysis, financial modeling and basic accounting principles</li> <li>Demonstrated experience with financial systems and data query tools</li> </ul>	<ul style="list-style-type: none"> <li>Knowledge of Microsoft Office Suite, advanced Excel and PowerPoint skills</li> <li>Advanced knowledge of budget management, financial analysis and financial modeling; working knowledge of accounting principles</li> <li>Demonstrated experience with financial systems and data query tools</li> </ul>	<ul style="list-style-type: none"> <li>MBA or Master's degree in relevant field preferred</li> <li>Knowledge of Microsoft Office Suite, advanced Excel and PowerPoint skills</li> <li>Advanced knowledge of budget management, financial analysis and financial modeling; working knowledge of accounting principles</li> <li>Demonstrated experience with financial systems and data query tools</li> </ul>
Certificates and Licenses	Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements	Physical Requirements
Working Conditions	Working Conditions	Working Conditions
<ul style="list-style-type: none"> <li>Work is performed in an office setting</li> </ul>	<ul style="list-style-type: none"> <li>Work is performed in an office setting</li> </ul>	<ul style="list-style-type: none"> <li>Work is performed in an office setting</li> </ul>

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<b>Job Family Summary:</b> Perform or manage a range of analytical, problem solving and evaluative work in support of the university's financial management. Work includes collecting and analyzing data, formulating and evaluating alternative solutions, and preparing reports.	
<b>Job Title:</b> Financial Analyst V	<b>Job Title:</b> Financial Analyst VI
<b>Job Code:</b> F0959P	<b>Job Code:</b> F0960P
<b>Grade Level:</b> 59 <b>Exemption:</b> Exempt	<b>Grade Level:</b> 60 <b>Exemption:</b> Exempt
<b>Effective/Revision Date:</b> January 2017	<b>Effective/Revision Date:</b> January 2017
<b>Job Summary</b>	
Lead specialized financial analysis for a school/unit to provide advanced solutions in support of financial planning.	Direct financial analysis and processes in preparation of annual budgets, mid-year forecasts, multi-year financial plans, multi-year capital plans and monthly and quarterly management reporting and analysis. Present analytics and recommendations to management to facilitate strategic financial decision making.
<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• Conduct financial and operational analysis to support planning efforts that span a wide range of initiatives including integrated capital planning process and school/unit based long-range financial planning</li> <li>• Analyze the consolidated budget, capital plans, multi-year financial plans, etc.; monitor current year budget to actual results. May manage the annual fiscal budget process</li> <li>• Review the quarterly and year-end financial results, identifying variances from prior year and budget</li> <li>• Analyze data from various systems to produce regular and ad hoc financial reports</li> <li>• Communicate results and reports to various University audiences; act as a resource, providing guidance and support</li> <li>• Provide specialized analytical and quantitative analysis to synthesize findings and provide management with actionable recommendations related to: the preparation of annual budgets, mid-year forecasts, and multi-year financial plans</li> <li>• Participate in review of operational processes and policies to ensure sound and consistent financial analysis protocol</li> <li>• Provide staff mentoring and training and development</li> <li>• Function as subject matter expert and/or project lead</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	<ul style="list-style-type: none"> <li>• Direct financial analysis processes, analyze business critical systems, and proactively resolve strategic issues that may span multiple areas</li> <li>• Function as a subject matter expert and/or project lead on financial operations</li> <li>• Develop and implement of strategies for: budgeting; forecasting, modeling &amp; projecting; identifying &amp; explaining variances; financial reporting; internal controls; expense reductions; cost containment; and revenue enhancements</li> <li>• Develop and maintain forecasting model for capital and/or operating budgets, develop long-range financial forecast, and develop capital and operating performance targets</li> <li>• Partner with finance leadership on multi-year financial plans and capital budgeting process</li> <li>• Identify opportunities and champion major initiatives for continuous improvement in support of internal controls and financial reporting processes</li> <li>• May act as a liaison to the University budget office</li> <li>• Collaborate with University-wide finance leadership to develop financial processes, policies and procedures</li> <li>• Provide staff mentoring and training</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>

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Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> <li>Bachelor's degree or equivalent work experience required</li> <li>Minimum of 8 years' relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>MBA, Master's degree or equivalent work experience required</li> <li>Minimum of 10 years' relevant work experience</li> </ul>
Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>MBA or Master's degree in relevant field preferred</li> <li>Knowledge of Microsoft Office Suite, intermediate Excel skills</li> <li>Advanced knowledge of budget management, financial analysis and financial modeling; working knowledge of accounting principles</li> <li>Demonstrated experience with financial systems and data query tools</li> </ul>	<ul style="list-style-type: none"> <li>Knowledge of Microsoft Office Suite, advanced Excel skills</li> <li>Advanced knowledge of budget management, financial analysis and financial modeling; working knowledge of accounting principles</li> <li>Demonstrated experience with financial systems and data query tools</li> </ul>
Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements
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## Job Family Matrix

<b>Job Function:</b> Finance		<b>Job Family:</b> Financial Planning and Analysis - Management	
<b>Job Family Summary:</b> Perform or manage a range of analytical, problem solving and evaluative work in support of the university's financial management. Work includes collecting and analyzing data, formulating and evaluating alternative solutions, and preparing reports.			
<b>Job Title:</b> Financial Analysis Mgt II		<b>Job Title:</b> Financial Analysis Mgt III	
<b>Job Code:</b> F0956M		<b>Job Code:</b> F0957M	
<b>Grade Level:</b> 56 <b>Exemption:</b> Exempt		<b>Grade Level:</b> 57 <b>Exemption:</b> Exempt	
<b>Effective/Revision Date:</b> January 2017		<b>Effective/Revision Date:</b> January 2017	
<b>Job Summary</b>		<b>Job Summary</b>	
Manage day to day financial analysis activities to support financial planning efforts.		Manage a variety of financial analysis activities to support financial planning efforts, budget analyses and reporting.	
<b>Core Duties</b>		<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Analyze financial models and reports; conduct trend analyses and variance analyses</li> <li>• Conduct quarterly and annual budget planning and multi-year forecasting to support overall departmental financial planning</li> <li>• Serve as the principal source of information on financial policies and procedures and provide guidance to faculty and staff</li> <li>• Assist in developing departmental financial policies and procedures</li> <li>• Collaborate with the department leadership and managers on financial operations</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>		<ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Analyze complex financial models and reports; conduct trend analyses and variance analyses</li> <li>• Manage quarterly and annual budget planning and multi-year forecasting to assist with overall departmental financial planning</li> <li>• Provide technical expertise, problem resolution and training</li> <li>• Evaluate departmental financial policies and procedures, recommend improvements</li> <li>• Collaborate with the department leadership and managers on financial operations</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	
		<ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Provide guidance and oversight of the financial planning activities and processes for a school/unit(s)</li> <li>• Lead quarterly and annual budget planning and multi-year forecasting</li> <li>• Develop specialized reporting and analyses for use in financial planning</li> <li>• Act as an advisor to department managers and staff</li> <li>• Analyze metrics and identify opportunities to streamline processes; develop and implement plans for improved procedures</li> <li>• Collaborate on the development of new procedures within school/unit that support University wide policies and initiatives</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	

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Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate Excel skills</li> <li>• Working knowledge of budget management, financial analysis, financial modeling and basic accounting principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> <li>• Supervisory experience</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, advanced Excel and PowerPoint skills</li> <li>• Advanced knowledge of budget management, financial analysis and financial modeling; working knowledge of accounting principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> <li>• Supervisory experience</li> </ul>	<ul style="list-style-type: none"> <li>• MBA or Master's degree in relevant field preferred</li> <li>• Knowledge of Microsoft Office Suite, advanced Excel and PowerPoint skills</li> <li>• Advanced knowledge of budget management, financial analysis and financial modeling; working knowledge of accounting principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> </ul>
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<b>Job Summary</b>	<b>Job Summary</b>
Oversee financial analysis and processes in preparation of annual budget activities. Develop and improve processes and tools to ensure accurate and timely monthly reporting and fiscal planning. Inform finance leadership with in depth analyses to establish operating budget targets and metrics.	Direct financial analysis and processes in preparation of annual budgets, mid-year forecasts, multi-year financial plans, multi-year capital plans and monthly and quarterly management reporting and analysis. Present analytics and recommendations to management to facilitate strategic financial decision making.
<b>Core Duties</b>	<b>Core Duties</b>
<ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Collaborate with University-wide finance leadership to improve processes and tools to maximize value and efficiency of financial planning and analysis efforts</li> <li>• Serve as a key resource for financial policies and procedures, ensure training to clients and staff</li> <li>• Develop and implement processes and systems for school/unit financial planning</li> <li>• Develop trend analysis of operating revenue and expenses in the context of budgets, forecasts and projections</li> <li>• Oversee the preparation and development of various financial reporting packages</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	<ul style="list-style-type: none"> <li>• Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment</li> <li>• Direct financial analysis processes, analyze business critical systems, and proactively resolve strategic issues that may span multiple areas</li> <li>• Develop and implement of strategies for: budgeting; forecasting, modeling &amp; projecting; identifying &amp; explaining variances; financial reporting; internal controls; expense reductions; cost containment; and revenue enhancements</li> <li>• Develop and maintain forecasting model for capital and/or operating budgets, develop long-range financial forecast, and develop capital and operating performance targets</li> <li>• Partner with finance leadership on multi-year financial plans and capital budgeting process</li> <li>• Identify opportunities and champion major initiatives for continuous improvement in support of internal controls and financial reporting processes</li> <li>• May act as a liaison to the University budget office</li> <li>• Collaborate with University-wide finance leadership to develop financial processes, policies and procedures</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>

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