



**JOB INFORMATION**

Job Code	KA53
Job Description Title	Spec, Fin Plan & Analysis
Pay Grade	FO09
Range Minimum	\$51,590
33rd %	\$63,620
Range Midpoint	\$69,640
67th %	\$75,660
Range Maximum	\$87,700
Exemption Status	Exempt
Approved Date:	1/1/1900 12:00:00 AM
Legacy Date Last Edited	6/6/2022

**JOB FAMILY AND FUNCTION**

Job Family:	Financial & Business Operations
Job Function:	Accounting & Finance

**JOB SUMMARY**

Reporting to the Manager, Financial Planning and Analysis, this entry-level position assists in the analysis of management statements, plans, and models that support the University's strategic plans for program creation and stability (at the institutional level, as well as for the colleges/units).

**RESPONSIBILITIES**

- Assist in gathering necessary data for validation and testing for overall deployment of new models to ensure an accurate and successful project within Anaplan.
- Assists with basic troubleshooting and provides recommendations for solutions. Interacts with Budget and Planning Services team to enhance the platform based on feedback from campus.
- Participate in the preparation of comparative and historical analysis by gathering necessary information and data.
- Participates in data analysis; gathers, compiles and manipulates data; may determine analytical methods to be used; identifies inconsistencies or significant findings.
- Assists in maintaining existing Anaplan models for annual planning, forecasting, reporting, and consolidations .
- Prepares and analyzes financial performance on weekly and monthly basis to identify key trends and variances.
- Collaborates on quarterly reporting package to management by analyzing performance versus key benchmarks and progress towards institutional goals / initiatives.
- Collaborate with finance teams to support all business functions by recommending and assisting in the building of business-specific dashboards for departments/leaders across the organization, including assisting in the building of long-term financial plans for auxiliary and other units.
- Assists in the preparation of detailed presentations of comprehensive materials; prepares graphs, charts, etc., for presentations.

**SUPERVISORY RESPONSIBILITIES**

Supervisory Responsibility	May be responsible for training, assisting or assigning tasks to others. May provide input to performance reviews of other employees.
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**MINIMUM QUALIFICATIONS**

**To be eligible, an individual must meet all minimum requirements which are representative of the knowledge, skills, and abilities typically expected to be successful in the role. For education and experience, minimum requirements are listed on the top row below. If substitutions are available, they will be listed on subsequent rows and may only be utilized when the candidate does not meet the minimum requirements.**

### MINIMUM EDUCATION & EXPERIENCE

Education Level	Focus of Education		Years of Experience	Focus of Experience
Bachelor's Degree	Accounting, Finance, Business, Data Analytics, Statistics, or related field. A CPA can be substituted for the specific degree.	And	0 years of	Experience in financial planning and analysis or financial modeling preferred, but not required for entry level.

### MINIMUM KNOWLEDGE, SKILLS, & ABILITIES

Knowledge of generally-accepted accounting practices and principles, ability to analyze financial data.
Knowledge and demonstration of best practices in budgeting and financial planning.
Ability to learn, navigate, and administer budget and long-term financial planning software.

### MINIMUM LICENSES & CERTIFICATIONS

Licenses/Certifications	Licenses/Certification Details	Time Frame	Required/Desired
None Required.			

### PHYSICAL DEMANDS & WORKING CONDITIONS

Physical Demands Category:

### PHYSICAL DEMANDS

Physical Demand	Never	Rarely	Occasionally	Frequently	Constantly	Weight
Standing			X			
Walking			X			
Sitting					X	
Lifting	X					
Climbing		X				
Stooping/ Kneeling/ Crouching		X				
Reaching			X			
Talking					X	
Hearing					X	
Repetitive Motions			X			
Eye/Hand/Foot Coordination			X			

### WORKING ENVIRONMENT

Working Condition	Never	Rarely	Occasionally	Frequently	Constantly
Extreme cold		X			
Extreme heat		X			
Humidity		X			
Wet		X			

## WORKING ENVIRONMENT

Working Condition	Never	Rarely	Occasionally	Frequently	Constantly
Noise		X			
Hazards		X			
Temperature Change		X			
Atmospheric Conditions		X			
Vibration		X			

**Vision Requirements:**  
Ability to see information in print and/or electronically.