JOB INFORMATION

Job Code	KA53
Job Description Title	Spec, Financial Planning & Analysis
Pay Grade	FO09
Range Minimum	$53,140
33rd %	$65,530
Range Midpoint	$71,730
67th %	$77,930
Range Maximum	$90,330
Exemption Status	Exempt
Organizational use restricted to the following divisions	112 AVP, Budgets & Business Operations
Approved Date:	9/25/2025 9:41:11 AM

JOB FAMILY AND FUNCTION

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

JOB SUMMARY

Under the direction of the Manager of Financial Planning and Analysis, this entry-level role plays a key part in evaluating financial statements, strategic plans, and forecasting models that inform and advance the University's long-term goals. The position supports data-driven decision-making for program development and sustainability across both institutional and college/unit levels.

RESPONSIBILITIES

- Designs, builds, and validates third-party planning platform models for financial planning, forecasting, reporting, and consolidations, ensuring accuracy, scalability, and alignment with institutional goals and best practices.
- Configures and optimizes third-party planning platform lists, modules, dashboards, and actions; troubleshoots model issues and recommends technical enhancements based on user feedback and Third-party planning platform best practices.
- Integrates third-party planning platform models with enterprise data sources and automates data flows to support comparative and historical financial analysis, ensuring seamless and reliable data connectivity.
- Analyzes, compiles, and manipulates financial data within a third-party planning platform, applying logic and coding to identify trends, variances, and significant findings that inform decision-making.
- Maintains and enhances third-party planning platform models for annual planning, forecasting, reporting, and consolidations, ensuring technical robustness, data integrity, and continuous improvement.
- Prepares and analyzes weekly and monthly financial performance using third-party planning platform dashboards and reports to identify key trends and variances, supporting timely and informed financial decisions.
- Collaborates on quarterly reporting packages by leveraging the third-party planning platform's analytical capabilities to benchmark performance and track progress toward institutional goals and initiatives, presenting insights to management and stakeholders.
- Collaborates 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 to effectively communicate financial insights and model outputs to stakeholders.
- May perform other duties as assigned.

SUPERVISORY RESPONSIBILITIES

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

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 to 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	no specific discipline required. A degree in Accounting, Finance, Business, Data Analytics, Statistics, or related field is desired. A CPA can be substituted for the specific degree.	and	0 years of	experience in financial planning and analysis or financial modeling.	

MINIMUM KNOWLEDGE, SKILLS, & ABILITIES

Knowledge of generally accepted accounting practices and principles.	
Knowledge and demonstration of best practices in budgeting and financial planning.	
Ability to analyze financial data.	
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.				

REQUIRED PRE-EMPLOYMENT/ONGOING SCREENINGS

Financial History Check

PHYSICAL DEMANDS & WORKING CONDITIONS

Physical Demands Category:	Other

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	

PHYSICAL DEMANDS

Physical Demand	Never	Rarely	Occasionally	Frequently	Constantly	Weight
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			
Noise		X			
Hazards		X			
Temperature Change		X			
Atmospheric Conditions		X			
Vibration		X			

Vision Requirements:

Ability to see information in print and/or electronically.