

JOB INFORMATION

Job Code	KA54
Job Description Title	Sr Analyst, Budget & Financial Planning
Pay Grade	FO11
Range Minimum	\$64,850
33rd %	\$82,140
Range Midpoint	\$90,790
67th %	\$99,430
Range Maximum	\$116,730
Exemption Status	Exempt
Organizational use restricted to the following divisions	112 AVP, Budgets & Business Operations
Approved Date:	6/10/2026 3:48:40 PM

JOB FAMILY AND FUNCTION

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

JOB SUMMARY

Serves as a strategic financial partner to University leadership by transforming complex budget, forecasting, and performance data into insights that guide long-term planning and institutional decision-making.

RESPONSIBILITIES

- **Annual Budget Development:** Leads and supports the formulation of the University’s annual budget by coordinating inputs across units, validating assumptions, and ensuring alignment with institutional priorities and long-term financial strategy.
- **State-Required Financial Reporting:** Prepares and oversees all financial submissions to the State of Alabama, including the Postsecondary Operations Plan, Legislative Budget Request, ACHE Needs Assessment, and additional ad hoc requests from survey groups, Governmental Affairs, and external stakeholders.
- **Campus Financial Collaboration:** Facilitates campus-wide discussions on budget development, financial reporting, and fiscal performance; meets regularly with business officers and leadership to communicate trends, risks, and opportunities.
- **Budget and Accounting Oversight:** Reviews, analyzes, approves, and prepares budget transfers, reallocations, and accounting entries to ensure accuracy, compliance, and alignment with financial policies.
- **Cross-Functional Financial Modeling:** Leads enterprise-wide financial modeling initiatives, designing and optimizing solutions within third-party planning platforms to deliver scalable, automated budgeting, forecasting, and reporting capabilities.
- **Advanced Analytics and Automation:** Aggregates and analyzes complex financial datasets using advanced analytical methods; builds and refines predictive models to support strategic planning; leads automation efforts to streamline Financial Planning & Analysis (FP&A) workflows and integrate disparate data sources.
- **Performance Reporting and Benchmarking:** Develops quarterly and ad hoc reporting packages using the planning platform’s analytical tools to benchmark performance, evaluate progress toward institutional goals, and present actionable insights to leadership and stakeholders.
- **Technical Financial Expertise:** Provides subject-matter expertise in financial modeling, scenario planning, and long-range forecasting; partners with campus finance teams to address complex financial challenges and strengthen long-term financial sustainability.
- **Executive-Level Communication:** Prepares high-impact presentations, including charts, dashboards, and visual analytics, to clearly communicate financial insights, model outputs, and strategic recommendations to senior leadership and campus stakeholders.

The responsibilities listed above show the typical duties for jobs in this classification. Actual tasks may differ depending on the department's needs. Other similar duties may be assigned with discretion of the supervisor. Not every duty will apply to every position, and the amount of time spent on each task can change based on department needs.

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	A degree in Accounting, Finance, Business, Analytics, Data Science, or related field is desired. A CPA, CFA, or CMA designation may be substituted for the specific degree.	and	4 years of	experience in reporting, financial analysis, or budgeting within an organization.	

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 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: Office and Administrative Support

PHYSICAL DEMANDS

Physical Demand	Never	Rarely	Occasionally	Frequently	Constantly	Weight
Standing			X			
Walking			X			
Sitting					X	
Lifting		X				10 lbs
Climbing		X				

PHYSICAL DEMANDS

Physical Demand	Never	Rarely	Occasionally	Frequently	Constantly	Weight
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 temperatures		X			
Hazards		X			
Wet and/or humid			X		
Noise			X		
Chemical		X			
Dusts		X			
Poor ventilation		X			

Vision Requirements:

Ability to see information in print and/or electronically.