

The University of Texas at San Antonio

Job Description

Job Title: Senior Financial Planning Analyst
Code: 19212
Salary Grade: 64
FLSA Status: Exempt
Department/Division: Campus Services
Reports To: Senior Associate VP for Campus Services

Summary

Function: Provides professional level developing, interpreting and implementing financial concepts for financial planning, resource planning (dollars), and control of organizational budget. May analyze and prepare recommendations for financial plans, including annual resource allocations, future requirements and operating forecasts. Serves as a subject matter expert and performs complex work assignments and problem resolution to support business decisions as it relates to our budget model. Helps to recommend business processes to support the budget development and monitoring annually.

Scope: Under supervision, the Sr. Financial Planning Analyst will primarily aid in upgrading the long-range Campus Services model. This includes, but is not limited to, using advanced professional financial concepts to expand the forecasting method of a variety of campus revenue and expenditure categories. Utilizing the long-range model, the Financial Analyst will prepare various scenarios, as requested by the Sr. AVP. Assist leadership in making well informed financial decisions. The incumbent will also provide support in the development of ad hoc analyses as requested by leadership. Will provide supplementary support to Campus Services as needed. All projects and analyses assigned to the Financial Analyst requires exercising judgement in selecting methods, techniques, and evaluation criteria to derive the desired outcomes.

Duties

Typical:

1. Develops and designs financial models to support budget and planning (i.e. revenue analysis, financial planning and consolidation, project planning, forecasting models, etc.
2. Prepares and updates forecast, which includes updating the revenue model, or internally generated forecast for revenue and expense reviews.
3. Applies advanced professional financial concepts to perform complex technical analysis in order to evaluate and understand past performance and determine present and future

performance and the consequent resource allocations. Provides analyses utilizing modeling “what-if” techniques for budget, planning and forecasting.

4. Analyzes data to ensure accurate reporting and integrity of the Financial and HR data as it relates to budget and planning systems and processes.
5. Performs complex financial or resource research and studies for both internal department and external constituents. Examples include periodic financial reports, staff salary budgets, contracts, rates and/or fees. Financial and/or resource analysis could include budgetary analysis, financial analysis, forecasts, projections, or FTE analysis.
6. Provides technical support for budget development, reporting and budget variance process. Prepares and guides team on recurring or ad hoc financial management reports and data retrieval for analyses.
7. Assists in the analysis and preparation of annual budget documents and provides technical expertise regarding the institution’s electronic budget system.
8. Prepares and delivers oral and written training, instruction and communications to both large and small groups.
9. Interprets information to identify change opportunities and makes recommendations to management about business process improvement to increase work efficiencies and effectiveness that will contribute to the achievement of the business goals and objectives.
10. Complies with applicable laws, regulations, policies & procedures employing sound financial and business practices and appropriate internal controls.
11. Supports department team members in special projects and other initiatives.
12. Performs other duties as assigned.

Periodic:

1. Reviews and processes documents for budget transactions and monitors transfers for appropriateness with established policies and procedures.
2. Assists in the review and reconciliation for the annual merit and equity pay processes.
3. Performs special studies, research and analysis of financial issues providing recommendations for courses of action as requested.
4. Budget data source maintenance and management to support reporting.

Education

Required	Preferred
Bachelor’s degree from an accredited institution.	Master’s Degree in Business Administration or directly related field.

Other Requirements

Required	Preferred
Strong knowledge of the principle and theories of finance, accounting or other	Advanced knowledge of financial data analysis.

related fields and disciplines as demonstrated from relevant positions.	
Knowledge of or ability to learn how to effectively use Business Intelligence reporting tools and forecast modeling tools to support budget, planning and forecast activities. Experience with PeopleSoft.	Proven ability to work well in team setting Proven ability to be a self-starter/independent worker.
Proficient with Microsoft Office and functionalities of financial accounting and reporting systems. Ability to use query and reporting tools. In depth ability to use multiple spreadsheet and database software tools to gather information for specialized, complex financial analysis, fiscal management, and financial reports.	Knowledge of and experience using Cognos and Hyperion.
Excellent verbal and written communications and ability to multi-task within a team-oriented environment.	
Excellent organization skills in identifying and prioritizing work activities. Ability to identify, collect, and analyze information from multiple sources.	
Exceptional problem solving and analytical skills.	
Attention to detail and ability to deliver high quality work. Ability to handle multiple assignments of various durations.	
Criminal Background Check (CBC).	

Experience

Required	Preferred
Six years of experience in budget analysis, financial assessment and/or forecasting experience.	Similar experience in higher education.
Four years of experience working with financial systems, data reporting, retrieval and analyses tools.	Ability to synthesize large amounts of data from multiple sources into concise message to drive business results.
Proven experience leading processes or projects with minimal supervision.	

Equipment

Required	Possible
Personal computer with Microsoft Office Suite.	Enterprise Resource Planning (ERP) Systems; i.e. PeopleSoft.

	On Line Analytical Reporting Tools; i.e. Hyperion and Cognos.
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Working Conditions

Usual	Special
Normal working conditions. Ability to work under strict time constraints.	Overtime hours occasionally required to meet deadlines.

Supervision

Received	Given
General instruction and supervision from assigned supervisor.	None.

Accuracy

Proficiency in all phases of the duties performed.
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Security Sensitive

Specific job requirements or physical location of some positions allocated to this classification may render the position security sensitive, and thereby subject to the provisions of section 51.215 Texas Education Code.

Internal Control

Within the scope of position duties, responsible for seeing that operations are effective and efficient, assets are safeguarded, reliable financial data is maintained, and applicable laws, regulations, policies, and procedures are complied with.
