Position Description

Requisition Number: 03021304
Position Number: 02015046
Dept: VP-INFO & EDUCATIONAL TECH - 061425
Position: BUDGET ANALYST
Approved Payroll Title Code: 7709
Approved Payroll Title: FINANCIAL ANL 3
Approved MSP Salary Grade:
Approved PSS Salary Grade: PSS22

POSITION DETAILS

Job Summary: Under the general guidance of the Business and Finance Manager, perform budgetary and financial functions for one or more IET departments and/or projects to assist in their effective management. Represent the IET CFO in meetings and discussions as needed. Ensure that appropriate accounting and internal controls are maintained, prepare and establish budgets, organizes resources according to budgetary plans, prepare both routine and ad hoc financial reports using data from the general ledger and departmental or project budgets, forecast revenue and expenses, assist in the development of rates for recharge services, and coordinate the development and management of Service Level Agreements.

Campus Job Scope:

Department Specific Job Scope: Information and Educational Technology is comprised of four departments: Academic Technology Services, Enterprise Applications & Infrastructure Services, Communications Resources & Data Center Services, and the Office of the Vice Provost-IET. IET has approximately 230 career FTE, approximately 100 student assistants, and an annual budget of approximately $34 million. It is supported primarily by general funds, recharge funds, registration fee funds, and some lottery funds. This position is located within the Office of the Vice Provost, which provides leadership and administrative services to IET as well as coordination to the campus community with respect to information and educational technology policy and planning.

Positions Supervised: None

Essential Responsibilities:

25% STRATEGIC BUDGETING/FORECASTING
Provide guidance to department heads/managers on
budget/financial/business issues. Represent CFO in meetings.
Develop/maintain budgets of one or more IET departments/projects. Build budget models using previous expenses, current year estimates, and future year projections. Apply department budget review methodology to analyze/assess budget plans according to impact by funding type and alignment with programmatic objectives. Use data retrieval/analysis tools to research budgetary issues. Distill data for decision-makers by evaluating data, identifying options/alternatives, making recommendations. Provide forecasts on budget impacts of service trends, rate/policy/technological changes on ongoing/planned operational objectives. Monitor legislative, regulatory, corporate developments that influence service strategies or pose operational opportunities/challenges for services; advise the CFO on actions to address these developments. Work on special projects as assigned.

10% SPECIAL PROJECTS
Lead special projects as needed.

25% FINANCIAL PROCESS/ANALYSIS
Assist CFO in analysis/development of expense strategies using a variety of funding sources, & in structuring department processes. Collaborate with the CFO & IET staff on modifying account structures. Serve as account manager for a variety of IET accounts. Monitor transactions for deviations from expectations & address them. Research, analyze, recommend, & implement measures to ensure financial controls. Create/revise financial approaches to address trends/changes in factors that have financial impacts. Provide break-even/marginal/variance analyses comparing monthly, quarterly, year-end revenue/expenses to department/project budgets. Perform financial audits/feasibility studies, research/compile data, participate in vendor contract reviews; respond to budget inquiries. Coordinate with IET Business Operations Unit (BOU) to process documents. Work with the BOU to conduct monthly/annual fiscal reviews & year-end closing, ensuring alignment of resources/expenses in the general ledger. Collaborate in the review, analysis, negotiation of terms & conditions of selected contracts between IET departments and vendors. Help develop & report on collection of department metrics. Develop data collection and presentation tools needed for operational activities, capacity planning, budget documents. Build multi-year metric comparison models. Analyze data; advise CFO on trends that affect services, expenditures, planning strategies.

20% RATE DEVEL/SLAS/BILLING
Review, analyze, develop recharge rates for self-supporting activities. Reconcile projected revenue with budget proposals. Develop/implement methods to track, report expenses/overhead/revenue by line of business. Contribute to the development/maintenance of systems for tracking/reporting billable/non-billable recharge time. Compare rates with private companies/peer institutions to assess competitiveness of existing operations/appropriateness of rate models. Develop, track, & maintain department Service Level Agreements with other campus units. Advise staff on SLA content; implement related billing. Produce/use billing system(s)
reports to analyze data for recharge activities; present findings to management. Work with billing staff to ensure the billing of approved rates & SLAs. Contribute to design/oversight of IET billing system(s).

20% FINANCIAL REPORTING
Prepare department/project financial reports presenting complex financial, client, & operational data in graphic/written/tabular forms. Create/maintain report formats; compile, verify, analyze financial/budget data; identify needs, prepare trend-lines; recommend financial adjustments to management. Prepare ad hoc reports on budget/financial issues for decision-makers. Work with A&FS on IET budget/accounting matters.

**Physical Demands:**
Work at a computer terminal for extended periods.

**Work Environment:**
Work extended or alternate hours as needed.
Work in a busy office environment with frequent interruptions.
Vacation is restricted during peak work periods.
Adhere to workplace safety practices, read information communicated about workplace safety, complete required safety training on time, and report any workplace safety issues promptly to their supervisor or the designated safety coordinator.

UC Davis is a smoke and tobacco free campus effective January 1, 2014. Smoking, the use of smokeless tobacco products, and the use of unregulated nicotine products (e-cigarettes) will be strictly prohibited on any UC Davis owned or leased property, indoors and outdoors, including parking lots and residential space.

**Background Check:**
Yes

**QUALIFICATIONS**

**Minimum Qualifications:**
Experience analyzing and working with large volumes or complex and financial data.
Experience guiding staff performing complex financial and budget analysis tasks.
Experience that demonstrates initiative, problem diagnosis, and proactive problem solving skills.
Skills to develop and apply creative innovative concepts to problem resolution.
Interpersonal skills to interact and communicate effectively and professionally with administration, staff, visitors and volunteers, using tact,
diplomacy, and good judgment during all interactions in the performance of a wide variety of programs and support functions.

Working knowledge of business or related field demonstrated through education or equivalent experience.

Experience with fund accounting and general accounting principles and techniques.

Experience with the application of accounting principles to budgeting, rate development, and financial reporting.

Experience monitoring and managing a complex budget using an automated accounting system (e.g., DaFIS).

Experience with statistical data collection techniques and quantitative analysis.

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<th>Preferred Qualifications for Selection:</th>
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<td>Experience preparing break-even analyses, variance analyses, and feasibility studies.</td>
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<td>Demonstrated experience conducting research.</td>
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<td>Experience in making presentations to groups, facilitating group discussions, and achieving consensus from disparate perspectives.</td>
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<td>Experience performing complex spreadsheet analyses, formulating and preparing complex reports, and preparing sophisticated presentations using Microsoft Office products (Excel, Word, and PowerPoint) or other automation tools.</td>
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<td>Knowledge of public sector business practices, entrepreneurial operations, and fund management.</td>
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<td>Knowledge of University of California, Davis, policies and procedures pertaining to financial administration, payroll, personnel, and other business-related activities.</td>
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<td>Experience using tact, diplomacy, and conflict resolution techniques.</td>
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<td>Experience using personal computers and demonstrated ability to learn applications software quickly.</td>
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**Expectations**

| Job Expectations | Read and follow the UC Davis Principles of Community. |
Develop and maintain a working knowledge of relevant technical terminology and concepts, i.e., relating to information, educational, and telecommunications technology.

Experience maintaining a strong degree of confidentiality, integrity, and judgment.

Ability to organize work and complete assignments in a timely way.  
Attention to detail to ensure data accuracy and consistency.  
Ability to work within supervisory direction.  
Willingness to learn and apply new technology.  
Ensure resources are directed toward programmatic goals.  
Work to facilitate accounting for operational activities.  
Perform all work with a high degree of accuracy and timeliness.  
Collaborate in development, implementation, refinement of an effective budget process.  
Integrate department/project budgetary objectives with overall IET budget planning.