



TEXAS WOMAN'S
UNIVERSITY™

DATE ISSUED: 02/19
FLSA: Exempt
PTO: VCS

JOB DESCRIPTION

TITLE

Senior Budget and Financial Analyst Systems

JOB SUMMARY

The Senior Budget and Financial Analyst Systems is responsible for assisting Texas Woman's University in reaching their budget objectives with primary oversight of the design and implementation of budget enhancements within the Oracle Budget Module. This position includes responsibility for the coordination, implementation, and continual monitoring and analysis of the annual budget versus actual data while ensuring compliance with TWU policies, state and federal guidelines and statutes. Work is performed under minimal supervision with broad latitude for initiative and independent judgment. The performance evaluation is conducted through the performance evaluation system and in accordance with the University Policies & Procedures.

ORGANIZATIONAL RELATIONSHIPS

Reports to: Associate Vice President, Budget & Finance Administration

Supervises: No supervisory responsibilities

ESSENTIAL DUTIES - May include, but not limited to the following:

- Responsible for the design, implementation, and enhancement of the Oracle Budget Module.
- Establishes budgetary controls, monitors budgetary approvals, and processes related to transactions in the Oracle Budget Module and Oracle Financial System.
- Coordinates and assumes a leadership role in the oversight, preparation, maintenance, and administration of the annual operating budget.
- Coordinates and assumes a leadership role in the oversight, preparation, maintenance, and administration of the summer operating budget.
- Ensures budget requests/expenditures are in compliance with TWU policies, state and federal guidelines and statutes.
- Coordinates and assumes a leadership role in the oversight, preparation, maintenance, and control of the merit compensation program.

*Sr Budget &
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- Models and forecasts salaries, including applicable promotion and faculty tenure projections for the fiscal year budget.
- Researches, models, analyzes, and forecasts the impact of merit salary data.
- Participates in the consolidation and summarization of budget recommendations as required at the program, unit, department, and university level.
- Reviews and analyzes budget data versus actual data to identify gaps, trends, and/or the need for short-term and/ or long-term forecast adjustments.
- Identifies trends and opportunities to improve financial status.
- Reviews, researches, compiles, and maintains monthly, quarterly, and annual reports for the Budget Office and Finance Administration.
- Provides program and policy guidance related to budget needs and decisions to university units.
- Consults with Finance Administration leadership regarding fiscal and university resources to ensure targets, expectations, and deadlines are met regarding budgetary decisions.
- Participates in the development, validation, and communication of financial metrics.
- Prepares and presents findings in multiple formats to multiple audiences.
- Reviews and approves budget transfers.
- Coordinates and manages the quarterly allocation of IDC funds.
- Coordinates and manages the monthly Auto Budget Process.
- Responsible for the coordination and oversight for the processing and management of university carryforward balances.
- Coordinates with other departments in the development, implementation, and maintenance of financial data to ensure the overall accuracy of reports required by State agencies and other ad hoc reporting requirements.
- Participates in multiple, special, and confidential projects as assigned by the AVP – Budget and Finance Administration.
- Supervises staff in the absence of the AVP, Budget & Finance.

ADDITIONAL DUTIES

- Performs other duties as requested.

EDUCATION

Bachelor's degree in accounting, finance, economics, business administration, or related area. Master's degree preferred.

EXPERIENCE

Five years related progressively responsible job-related experience, preferably in higher education. Proficiency in the use of software applications, databases, and spreadsheets is required.

REQUIREMENT

Regular and reliable attendance at the University during regular scheduled days and work hours is an essential function of this position.

KNOWLEDGE, SKILLS, AND ABILITIES - *The following are essential:*

- Knowledge of budget procedures, including revenue and expenditure processes, including University, State, Local, and Federal regulations.
- Knowledge of advanced modeling techniques to be used in a complex environment.
- Knowledge of advanced database applications and tools and personal computer applications.
- Knowledge of advance applications for complex data management systems for higher education.
- Knowledge of budget, finance, human resources, and payroll systems processes as they relate to the Budget Office.
- Knowledge of the Oracle Budget and/or Financial System.
- Ability to apply budgetary and fiscal planning techniques within financial constraints.
- Ability to organize work effectively, conceptualize and prioritize objectives and exercise independent judgment based on an understanding of organizational policies and activities.
- Ability to integrate resources, policies, and information for the determination of procedures, solutions, and other outcomes.
- Ability to provide administrative guidance within area of responsibility, providing direct training and supervision as needed.
- Ability to establish and maintain effective work relationships with students, faculty, staff, and the public.
- Ability to communicate effectively orally, by phone, in person, and in writing.
- Ability to use a personal computer and other office equipment, including related university software and email.

PHYSICAL DEMANDS

The physical demands described in the Essential Duties and below are representative of those that must be met by an employee to successfully perform the essential duties of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential duties.

The employee may be required to travel.

WORK ENVIRONMENT

All employees are responsible for maintaining an environment that is free from discrimination, intimidation, harassment, including sexual harassment. Work is normally performed in a typical interior work environment.

SAFETY

TWU promotes a safe working environment. Employees are responsible for completing assigned tasks safely and efficiently, and supervisors are responsible for creating and maintaining a safe work environment. Employees must report any unsafe work conditions or practices, as well as any near-miss incidents, to their supervisor and Risk Management. Supervisors and employees should ensure that injury/accident reports are submitted to the Office of Human Resources and Risk Management within 24 hours of the incident.

The job description does not constitute an employment agreement between the employer and employee and is subject to change by the employer as the needs of the employer and requirements of the job change.

Employee Signature: _____ **Date:** _____

Employee Printed Name: _____

Texas Woman’s University strives to provide an educational environment that affirms the rights and dignity of each individual, fosters diversity, and encourages a respect for the differences among persons. Discrimination or harassment of any kind is considered inappropriate.

Texas Woman’s University is committed to equal opportunity in employment and education and does not discriminate on the basis of race, color, religion, gender, sex, sexual orientation, ethnic origin, age, veteran’s status, or against qualified disabled persons.

All positions at Texas Woman’s University are deemed security sensitive requiring background checks.