

JOB INFORMATION

Job Code	KA54
Job Description Title	Sr. Spec, Fin Plan & Analysis
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:	9/25/2025 9:40:09 AM

JOB FAMILY AND FUNCTION

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

JOB SUMMARY

Reporting to the Manager of Financial Planning and Analysis, this position contributes to the University's strategic initiatives by analyzing financial statements, operational plans, and forecasting models. The role supports data-driven decision-making for program development and long-term sustainability across both institutional and college/unit levels.

RESPONSIBILITIES

- Leads cross-functional financial modeling initiatives, architecting and optimizing solutions using third-party planning platforms to deliver scalable, automated budgeting and reporting across university units.
- Oversees technical deployment, data validation, and system integration for new models within third-party planning platforms; applies advanced troubleshooting and implements enhancements based on stakeholder feedback to maximize platform performance.
- Aggregates and analyzes complex financial datasets using advanced analytics; designs and refines predictive models to support strategic planning. Leads automation projects to streamline Financial Planning & Analysis (FPA) workflows and integrates data sources for improved efficiency.
- Provides technical expertise in financial modeling and scenario analysis. Partners with campus finance teams to develop robust long-term financial plans and address complex financial challenges.
- Designs, implements, and maintains dynamic financial dashboards using visualization tools to enable real-time performance monitoring and data-driven decision-making for leadership.

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	no specific discipline required. A degree in Accounting, Finance, Business or related field is desired. A CPA can be substituted for the specific degree.	and	3 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 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
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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	
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.