

Budget and Financial Analyst (7709U) - 64058
University of California, Berkeley

Direct Link: <https://www.AcademicKeys.com/r?job=229492>

Downloaded On: May. 9, 2024 2:46pm

Posted Jan. 25, 2024, set to expire Jun. 30, 2024

Job Title Budget and Financial Analyst (7709U) - 64058
Department History
Institution University of California, Berkeley
Berkeley, California

Date Posted Jan. 25, 2024

Application Deadline Open until filled
Position Start Date Available immediately

Job Categories Professional Staff

Academic Field(s) Fiscal Services
Finance/Investment Management

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Apply By Email

Job Description

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About Berkeley

At the University of California, Berkeley, we are committed to creating a community that fosters equity of experience and opportunity, and ensures that students, faculty, and staff of all backgrounds feel safe, welcome and included. Our culture of openness, freedom and belonging make it a special place for students, faculty and staff.

The University of California, Berkeley, is one of the world's leading institutions of higher education,

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distinguished by its combination of internationally recognized academic and research excellence; the transformative opportunity it provides to a large and diverse student body; its public mission and commitment to equity and social justice; and its roots in the California experience, animated by such values as innovation, questioning the status quo, and respect for the environment and nature. Since its founding in 1868, Berkeley has fueled a perpetual renaissance, generating unparalleled intellectual, economic and social value in California, the United States and the world.

We are looking for equity-minded applicants who represent the full diversity of California and who demonstrate a sensitivity to and understanding of the diverse academic, socioeconomic, cultural, disability, gender identity, sexual orientation, and ethnic backgrounds present in our community. When you join the team at Berkeley, you can expect to be part of an inclusive, innovative and equity-focused community that approaches higher education as a matter of social justice that requires broad collaboration among faculty, staff, students and community partners. In deciding whether to apply for a position at Berkeley, you are strongly encouraged to consider whether your values align with our [Guiding Values and Principles](#), our [Principles of Community](#), and our [Strategic Plan](#).

At UC Berkeley, we believe that learning is a fundamental part of working, and our goal is for everyone on the Berkeley campus to feel supported and equipped to realize their full potential. We actively support this by providing all of our staff employees with at least 80 hours (10 days) of paid time per year to engage in professional development activities. To find out more about how you can grow your career at UC Berkeley, visit grow.berkeley.edu.

Departmental Overview

The Department of History is rated one of the top academic programs nationally and globally. As one of the largest teaching departments in the College of Letters and Science, enrolling over 8000 students in 150 courses each year, our courses serve campus and department graduation requirements across the University. The department is comprised of 50 tenure-track faculty, 30 emeriti, and 12 career staff. Annual hires include 15-20 visiting instructors, 25-30 visiting scholars, approximately 230 academic student employee appointments, and 10-15 casual employees. With approximately 100 graduate students, 250 undergraduate majors, and 100 minors, students in our program are able to select from a broad range of fields of study. The History department is committed to supporting a large and diverse population of students. Over the past 5 years, the department has seen a significant increase in graduate and undergraduate students of color.

Position Summary

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The History department's large faculty population, individualized graduate student funding models, and funding streams from multiple sources results in a large volume of financial transactions, a complex organization budget, and high-level analysis. This role involves 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.

Application Review Date

The First Review Date for this job is: 02/06/2024.

Responsibilities

Fiscal Analysis and Budget Management:

- Construct and assemble data for budgeting and decision making; develop conclusions, and present high-level summary of recommendations. Include annual resource allocation approaches, trend analysis to assess future requirements, operating forecasts and sources. Create and manage new financial/resource reports.
- Create and analyze monthly and ad hoc budget and financial reports, often generated from multiple financial systems and dashboards. Track expenses, and provide cost projections and analysis for the following: staff, faculty and temporary academic staff salaries, gifts and endowment income, revenue and endowment income, graduate fellowship funds, etc. Provide reporting as follows: quarterly budget analysis, custom Cal Answers reports, payroll exception reports, and encumbrances reports, as needed.
- Provide research and reporting for various internal department constituents including regular faculty budget reports.
- Perform reconciliation functions for History's non-contract and grant funds, including analyzing payroll expense reports, CalAnswers reports, L&S commitments database, and CalPlanning/Human Capital Planning.
- Oversee and maintain all department funds, resolve deficits, and manage the correction of all chartstring and allocations errors.
- Manage records and process financial transactions related to faculty hiring and retention.
- Manage unit budgets, student awards, gift and endowment funds.
- Oversee Procurement Card program.
- Maintain department commitment tracking in L&S commitments database.
- Maintain compliance with SAS 115 requirements, completing and documenting required reviews for assigned department IDs on a monthly basis.

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Budget Forecasting:

- Independently gather information, analyze, develop, prepare, forecast, and summarize future revenue, expenses and financial trends for History. Work with faculty, the Department Chair, the Department Manager, and the Dean's Office to plan, propose and update future years budgets.
- Generate analyses for complex summaries and proposals relative to a diverse range of topics to include new financial procedures and/or services, changes to department policies.
- Analyze and forecast staff /faculty salary budgets, current and future faculty commitment allocations, gifts, endowments, or other revenue sources, in order to create as accurate a financial model as possible.
- Participate in the annual CalPlanning budget and forecast process and quarterly forecast updates.
- Coordinate with colleagues, the Dean's office, and the Campus Budget Office to enter data, run reports, and meet deadlines related to the forecast and budget processes.

Financial Control:

- In coordination with the Director of Administration and Department Chair, implement department budget allocations.
- Maintain department chart of accounts, other data management tools, and related business processes.
- Ensure that the appropriate internal controls are addressed, maintained and strengthened to protect University resources to minimize risk and to comply with legal regulations and tax implications.
- Coordinate department-wide monthly reconciliation and signs off on financial controls.
- Ensure fiscal close goals are met.
- Prepare, review, and/or approve various financial transactions, such as financial journals, BearBuy requisitions, blucard transactions, UCPath templates, IST requests, and more.

Fund Manager for Special Projects:

- Manage oversight of graduate student funding budget in collaboration with Director of Administration and Director of Student Services; budgets funding from Block Grants, Department funds, Gifts and Endowments, Dean's Office and Graduate Division in order to maximize all available resources.
- Temporary Academic Staffing (TAS) management and oversight, ensuring that spending

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projections are on track and that external courses of funding are reconciled each academic year.

Collaboration and Communication:

- Act as liaison with various campus units (Berkeley Regional Services, Dean's Office, Disbursements, Account Receivables, Business Contracts and others) on issues related to purchasing, bluCard transactions, travel and entertainment, reimbursements, independent contractor, and external service agreement contracts.
- Advise, train, review, and coach the finance and budget related work of faculty, staff, and students throughout the department.
- Communicate with department faculty and staff, or external clients and vendors to resolve matters needing an escalated level of resolution.

Business Process Management:

- Provide department support in the areas of business process analysis and design, documentation, and workflow. Continuously assesses departmental financial processes to ensure that standards, fiscal control and accountability are considered.
- Recommend and implement procedures to affect various constituencies, including department, students and external vendors.
- Streamline workflows for efficiencies and high-quality service.
- Document procedures for financial activities.
- Review and update web-based tools and self-help resources. Provide training as needed to staff and create and maintain a set of departmental training resources for faculty and students.

Professional Development:

- Participate in employee development and training programs or other workshops to maintain or improve the necessary skills to perform the duties described above.

Required Qualifications

- Thorough knowledge of finance policies and procedures supporting research and educational activities.
- Familiarity with various business and financial data management and reporting systems.

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- Proven efficiency and accuracy in the preparation of budgets of all types.
- Utilize organization and prioritization skills to manage a high-volume workload, balance complicated long-range projects and proposals with short-term/immediate tasks, ensure priorities and other deadlines are met, and maintain flexibility to redirect efforts when priorities change.
- Ability to independently gather required information to organize and perform complex financial analysis and customized reporting.
- Ability to analyze expenditures, recognize trends, and support budget justifications consistent with funding requirements.
- Strong verbal and written communication skills to collaborate with team members, present instructions and updates to stakeholders, and communicate financial data and modeling in a clear, logical, and concise manner to target audience.
- Demonstrated ability to communicate and effectively interact with people across cultures, ranges of ability, genders, ethnicities, races, and other areas of difference.
- Excellent interpersonal skills with ability to develop and maintain cooperative professional relationships with employees at all levels of the organization and work collaboratively with individuals and groups to incorporate their ideas and adapt to their needs.
- Customer service focus across broad and diverse subject areas.
- Maintain independent and sound judgment, and exhibit a high degree of integrity.
- Develop original ideas to solve problems.
- Leadership skills to provide guidance, coaching and mentoring to professional and support staff.
- Knowledge and understanding of internal control practices and their impact on protecting University resources.
- Competence in the use of common software suites (MS Office, Adobe, and Google) and other common desktop/web applications used for complex financial analysis, fiscal management, and financial reports.
- Strong Excel skills including pivots, filtering, and advanced formulae.
- Bachelor's degree in related area and/or equivalent experience/training.
- Five or more years of relevant work experience, or combination of education and relevant work experience.

Preferred Qualifications

- Thorough knowledge of finance policies and procedures supporting research and educational activities, in a university environment.
- Experience with UC Berkeley's online and web-based accounting systems (such as Bearbuy, BFS, UCPath, CDS, Smartview, CalPlanning and CalAnswers, and the interactions between between the various Berkeley financial systems).

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- Master's degree in finance or accounting, CPA, or other related advanced education in fiscal management or accounting.

Salary & Benefits

This is a 100% full-time (40 hrs a week) exempt career position, which is paid monthly and eligible for UC Benefits.

For information on the comprehensive benefits package offered by the University, please visit the University of California's [Compensation & Benefits](#) website.

Under California law, the University of California, Berkeley is required to provide a reasonable estimate of the compensation range for this role and should not offer a salary outside of the range posted in this job announcement. This range takes into account the wide range of factors that are considered in making compensation decisions including but not limited to experience, skills, knowledge, abilities, education, licensure and certifications, analysis of internal equity, and other business and organizational needs. It is not typical for an individual to be offered a salary at or near the top of the range for a position. Salary offers are determined based on final candidate qualifications and experience.

The budgeted salary or hourly range that the University reasonably expects to pay for this position is \$82,000.00 - \$109,000.00.

How to Apply

- To apply, please submit your resume and cover letter.

Other Information

- This is not a visa opportunity.
- This position is eligible for up to 40% remote work.

Conviction History Background

This is a designated position requiring fingerprinting and a background check due to the nature of the

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job responsibilities. Berkeley does hire people with conviction histories and reviews information received in the context of the job responsibilities. The University reserves the right to make employment contingent upon successful completion of the background check.

Equal Employment Opportunity

The University of California is an Equal Opportunity/Affirmative Action Employer. All qualified applicants will receive consideration for employment without regard to race, color, religion, sex, sexual orientation, gender identity, national origin, disability, or protected veteran status. For more information about your rights as an applicant, please see [the U.S. Equal Employment Opportunity Commission](#) poster.

For the complete University of California nondiscrimination and affirmative action policy, please see the University of California [Discrimination, Harassment, and Affirmative Action in the Workplace](#) policy.

Referral Source Info

This job is part of the Employee Referral Program. If a UC Berkeley employee is referring you, please ensure you select the **Referral Source** of "*UCB Employee*". Then enter the employee's **Name** and **Berkeley email** address in the **Specific Referral Source** field. Please enter only one name and email.

To apply, visit

https://careerspub.universityofcalifornia.edu/psp/ucb/EMPLOYEE/HRMS/c/HRS_HRAM.HRS_APP_SCH

Contact Information

Please reference Academickeys in your cover letter when applying for or inquiring about this job announcement.

Contact

N/A

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