

POSITION DESCRIPTION

IMPORTANT: PLEASE READ INSTRUCTIONS ON PAGES 2 and 3

OSER-DMRS-11 (Rev. 03-06)
 State of Wisconsin
 Office of State Employment Relations

1. Position No.	2. Cert / Reclass Request No.	3. Agency No. 285
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4. NAME OF EMPLOYEE	5. DEPARTMENT, UNIT, WORK ADDRESS Business Services University of Wisconsin Parkside PO Box 2000, 900 Wood Road Kenosha, WI 53141-2000
6. CLASSIFICATION TITLE OF POSITION Budget and Policy Analyst - Division	8. NAME AND CLASS OF FORMER INCUMBENT Jill Finger, Budget and Policy Analyst Division
7. CLASS TITLE OPTION (to be filled out by Personnel Office)	10. NAME & CLASS OF EMPLOYEES PERFORMING SIMILAR DUTIES
9. AGENCY WORKING TITLE OF POSITION Budget and Policy Analyst	12. FROM APPROXIMATELY WHAT DATE HAS THE EMPLOYEE PERFORMED THE WORK DESCRIBED BELOW?
11. NAME AND CLASS OF FIRST-LINE SUPERVISOR Scott Menke, Controller/Director of Business Services	
13. DOES THIS POSITION SUPERVISE SUBORDINATE EMPLOYEES IN PERMANENT POSITIONS? Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> IF YES, COMPLETE AND ATTACH A SUPERVISOR EXCLUSION ANALYSIS FORM (OSER-DMRS-84).	

14. POSITION SUMMARY – PLEASE DESCRIBE BELOW THE MAJOR GOALS OF THIS POSITION:

15. DESCRIBE THE GOALS AND WORKER ACTIVITIES OF THIS POSITION (Please see sample format and instructions on Page 3.)

- GOALS: Describe the major achievements, outputs, or results. List them in descending order of importance.
- WORKER ACTIVITIES: Under each goal, list the worker activities performed to meet that goal.
- TIME %: Include for goals and major worker activities.

TIME %	GOALS AND WORKER ACTIVITIES	(Continue on attached sheets)

16. SUPERVISORY SECTION - TO BE COMPLETED BY THE FIRST LINE SUPERVISOR OF THIS POSITION (See Instructions on Page 2)

a. The supervision, direction, and review given to the work of this position is close limited general.

b. The statements and time estimates above and on attachments accurately describe the work assigned to the position.
 (Please initial and date attachments.)

Signature of first-line supervisor Scott Menke Date 11/12/14

17. EMPLOYEE SECTION - TO BE COMPLETED BY THE INCUMBENT OF THIS POSITION

I have read and understand that the statements and time estimates above and on attachments are a description of the functions assigned my position.
 (Please initial and date attachments.)

Signature of employee _____ Date _____

18. Signature of Personnel Manager _____ Date _____

DISTRIBUTE COPIES OF SIGNED FORM TO:
 P-FILE OFFICE OF STATE EMPLOYMENT RELATIONS EMPLOYEE DEPARTMENT CERT REQUEST COPY

Position Description: Budget & Policy Analyst

B. Job Title: Budget & Policy – Division

C. Is this position hourly or salaried? Hourly

D. Shift and hours of position: 7:45 a.m. - 4:30 p.m., Monday - Friday

E. Number of subordinates (if applicable): None

F. List of essential job functions, knowledge, abilities, and skills:

The Budget & Policy Analyst reports to the campus Budget Officer and has primary responsibility for submitting the institution's annual budget to UW-System. Responsibilities include assisting the Budget Officer to track, monitor and report on changes and adjustments to the budget throughout the year.

Campus Budget Development and Submission (25%)

1. Oversee the data preparation of the annual budget for all departments and funds at the University. Manage and oversee the annual budget entry process. Consult with UW-System staff regarding technical requirements and reports. Reconcile the all-funds budget submission and allocations.
2. Submit required budgetary reports to UW-System, including reports on activity/program shifts, major class shifts, uses of targeted allocations, position control, and other reports as requested.
3. Work cooperatively with the Director of Human Resources to administer compensation plans.

Campus Budget Management (70%)

1. Publish the annual campus budget to assist University financial manager and staff with management oversight responsibilities.
2. Oversee and communicate budget changes throughout the budget year.
3. Process budget changes caused by personnel actions including providing council and documentation as to availability of funds and FTE.
4. Create, approve and process budget transfers. Advise campus staff regarding budget transfer policies and procedures.
5. Assist with monitoring budgets and expenditures for campus-wide departments and projects.
6. Oversee information on campus position utilization.
7. Share budget information with Deans, Directors and Senior Campus Leadership to facilitate their planning and monitoring responsibilities.
8. Assist with the monitoring of campus discretionary and contingency funds.
9. Assist with the monitoring of revenue streams and budget expenditures. Make recommendations to the Budget Officer regarding necessary budget adjustments.
10. Assist with the academic staff planning process including monitoring, tracking, and transferring funds as directed.

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Other duties (5%)

1. Monitor and analyze other revenue streams within the context of applicable budget and revenue policies.
2. Assist with various UW System and external reporting requirements.
3. Assist with tracking vacancies across campus.
4. Assist with preparing and submitting the UW-Extension budget including assisting with reporting requirements and related correspondence.
5. Assist and participate in the annual campus budget process as directed.
6. Assist with budget training for University staff regarding preparation and submission of budget materials.
7. Assist with budget analysis and outcome assessment of campus proposals.
8. Assist with developing budget proposals for establishing new academic programs.
9. Other duties as assigned.

Essential Knowledge and Abilities

- Knowledge of budget and finance systems in both non-profit and government setting.
- Knowledge and skill in effective use of business application programs, budget preparation applications, and People Soft or equivalent financial MIS accounting application systems.
- Skill in effective communication, both orally and in writing, for the purpose of obtaining or conveying information and to synthesize information into appropriate action.
- Ability to manage multiple tasks and set priorities under competing deadlines.
- Ability to develop, modify, analyze, and monitor budget data.
- Ability to think analytically.
- Ability to solve problems independently.
- Ability to establish and maintain effective working relationships with UW System Administration, University officials, staff, and students.
- Ability to be highly accurate with strong attention to detail.
- Possess strong organizational skills.
- Ability to maintain professionalism and respect for confidentiality.

G. List of marginal job functions

- Filing.
- Make copies
- Process emails
- Maintain office appearance and cleanliness.

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H. Responsible for money, University funds, or accounts which hold financial information?

Yes.

I. Ergonomic requirements

- Stand, reach, and bend to do filing and similar tasks.
- Walking to different areas of campus.
- Frequent keyboarding.
- Frequent use of calculator.
- Answering the telephone.
- Basic eye/hand coordination for computer and office machine usage.

J. Qualifications:

Minimum Qualifications

- Two years of responsible budget experience in a higher education, government, or corporate setting.
- Effective oral and written communication skills.
- Demonstrated analytical skills.
- Ability to work with personnel from diverse backgrounds.
- Commitment to customer service.
- Demonstrated ability to handle multiple priorities.
- Knowledge of and experience with complex computer-based financial accounting management systems.
- Proficiency in use of spreadsheets, word processing, and database applications using Microsoft Office suite.

Preferred Qualifications

- Bachelor's degree in business, accounting, finance or related field.
- Familiarity with PeopleSoft Shared Financial System.
- Familiarity with the UWS Budget System.
- Two years of experience in fund management accounting or budgeting.
- Knowledge of the UW System and Board of Regent budget/financial policies and resource allocation practices.
- Familiarity with higher education funding sources and related policy issues.
- Experience establishing and maintaining working relationships with individuals at all organizational levels.

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K. Equipment to be used on the job:

(By each piece of equipment, put an "F" for frequent use, an "O" for occasional use, or an "R" for rare use.)

- Tools: (power of manual tools) R
- Large Machinery: (includes vehicles) R
- Electrical Equipment: (i.e., floor buffer, includes office equipment) F - Frequently will use computer/printer, typewriter, fax machine, calculator, copy machine, and telephone.
- Chemicals: (includes cleaning supplies, lab chemicals, hazardous waste) O - Occasionally changes printer, copier, and fax toner cartridges.

L. Knowledge, Skills and Abilities:

- Excellent written & oral communication and interpersonal skills.
- Effective organizational and management skills with high level of attention to detail and ability to coordinate and prioritize work and activities.
- Ability to make good decision making capabilities and maintain confidentiality.
- Must be courteous, responsive, and service oriented and have the willingness to accept new and different responsibilities and maintain a professional and welcoming manner.
- Ability to work with a diverse group of people (faculty, staff, students, visitors, and the public) using tact courtesy and discretion.
- Ability to work independently and take ownership as well as function effectively in a team.
- Ability to manage multiple, concurrent projects, and still meet strict deadlines.
- Proficiency with software applications, such as Microsoft Word, Excel, and Power Point. Efficient in utilizing electronic forms, e-mail, e-calendar and the internet.
- Knowledge of UW travel procedures and claims for reimbursement.
- Knowledge of basic accounting and cash management principles.
- Ability to learn UW regulations relating to fiscal management.
- Ability to learn web-based accounting system.
- Knowledge of University policies and procedures.

M. Organizational chart: Attached

University of Wisconsin - Parkside Business Services Organization Chart

