

Position Summary

Employee Details

Employee First Name:
Employee Last Name: Open Position
Employee ID:

Classification

Payroll Title: FINANCIAL SVC ANL 3
Payroll Title Code: 4628
Job Group: B08
Overtime Eligible: Exempt
(FLSA)
Employee Relations Unit: 99
(Bargaining Unit)
Representation: Uncovered
Salary Grade: PSS21

Position Description

Position Number: 02012266
(Assigned when added to Library)
Dept: VICE CHANCELLOR - RESEARCH - 061010
Position: FINANCIAL ANALYST and SYSTEMS ADMINISTRATOR
HEERA/Union Representation: This position is not represented by a collective bargaining unit

IMMEDIATE SUPERVISOR

Supervisor Name: Delanda Buchanan
Supervisor Payroll Title: Executive Director of Business & Finance
Supervisor Phone Number: (530) 754-7732

POSITION DETAILS

Job Summary: Under general supervision of the Executive Director of Business and Finance (EDBF) in the Office of Research (OR), responsible for independently performing high-level financial analysis and strategic planning activities in support of the Vice Chancellor for Research (VCR) - Business & Finance Unit. Collaborate with institutions and other strategic partners in the development, implementation, integration, and ongoing maintenance of financial and administrative operating systems.

Independently develop complex financial models and reports, compile and research complex accounting issues, and develop various key performance

indicators and analytics. Collaborate with and provide guidance to the three (3) Associate Vice Chancellors (AVCs) and the Academic and Administrative Directors in the development of the annual operating budget for multiple units. Prepare, analyze, and present monthly, quarterly, and annual budget reports to key stakeholders throughout the organization. Develop, maintain, and report key performance metrics including the creation and maintenance of system dashboards; and perform complex financial analyses for OR as a whole and on an individual unit basis to inform the AVCs and the EDBF in the decision-making process.

Independently provide financial management reports in support of the operational budgets for the Technology Management & Corporate Relations (TMCR) division, IT Development and Operations, and the VCR campus-wide initiatives and programs. Collaborate with academic units campus-wide in the employment and management of VCR initiatives and programs in excess of \$10M. Assist in the development of the OR annual report for submission to the Chancellor's Office, develop and maintain computerized databases and spreadsheets for complex analysis and reporting. Prepare multi-year budgets and financial plans; prepare detailed reconciliations, assist in the development of recharge rates for the research units, complete expense and fund transfers; make recommendations for continuous improvement in the analysis and quality of financial information.

Campus Job Scope:

The Office of Research (OR) serves as the catalyst for advancing the research mission at UC Davis. The OR currently oversees 21 research units, special research programs and projects, and central facilities with over 1,100 employees and annual expenditure and recharge income in excess of \$155 Million. In addition, OR oversees 15 administrative units, the campus-wide Research Core Facilities Program, campus-wide research funding programs of \$3.2 Million, and the Animal Use and Care Program.

Department Specific Job Scope:

The Business & Finance Unit has financial oversight and responsibility for all units reporting to the Office of Research which encompasses over 21 organized research units, special research programs, and core facilities in addition to 15 administrative units and several campus-wide programs. Collectively, the annual revenue and expenses exceed \$155 Million.

This position plays a key role in the areas of financial planning & analysis, financial reporting, and short-term and long-term forecasting for research and administrative units reporting to the VCR Office. As well, this position plays a critical role as the Financial Systems Administrator for the VCR Office including system administration for the Adaptive Insights Financial Forecasting & Planning System, the Aggie Budget System, the Kuali Financial System (KFS) and a host of other internal systems.

Positions Supervised:

NA

Essential Responsibilities:

60% STRATEGIC BUDGETING/FORECASTING/ANALYSIS

Independently develop complex funding models & financial reporting to inform the decision-making process for several key stakeholders within the Office of Research. Work in collaboration with & provide guidance to the three (3) Associate Vice Chancellors (AVCs) in their individual areas of responsibilities. Independently develop, analyze & present financial analysis including management reports, variance analysis, trend analysis & historical compilations of key data. Provide written narrative, graphical display & financial analysis explaining key variances & anticipate & report on future trending.

Independently work directly with the Academic & Administrative Directors to

provide & present monthly, quarterly, annual & multi-year budgets & budget analysis. Independently research budgetary issues & activities with the expectation to report & inform the decision-making process by evaluating & analyzing big data, identifying & communicating options, research alternative approaches & provide recommendations. Requires working knowledge of several fund sources including federal, state, restricted & unrestricted funds, self-supporting activities & university funds. Develop key metrics including system-based dashboard reporting. Develop multi-year projections & long-range planning. Independently develop & deploy complex excel spreadsheet in concert with several integrated financial systems to accurately capture & report data.

30% FINANCIAL SYSTEMS DEVELOPMENT & ADMINISTRATION

Serve in the lead role as Financial Systems Administrator for the Vice Chancellor for Research (VCR) Office. Under the general direction of the Executive Director of Business & Finance (EDBF), responsible for the development, employment, integration & maintenance of critical financial systems including the Adaptive Insights Planning & Forecasting model, the Aggie Budget System, Pre-purchasing (OPP) System, Aggie Service, Google Docs & Forms, & a host of other mission-critical systems. Collaborate in the review, analysis, negotiations & coordination of financial & administrative system implementations within the Business & Finance unit. Collaborate with internal UC Davis units across campus & external vendors & partners in the design, deployment & maintenance of the financial systems. Serve as the OR representative on campus-wide committees & user groups, attend seminars & training on system releases, design, upgrades, data validation & a host of other key functions. Design & develop system reporting capabilities, dashboards, & other reporting tools. Work with the IT unit to integrate with various campus-wide systems including the C&G system (Cayuse), Payroll, Quali, & Google Docs. Work directly with the research & administrative unit directors & managers to enhance functionality, maintain user access/updatability permissions, add/delete users, etc... Maintain the roll-forward on multi-year budget sheets, ensure the various systems are in sync, add/delete new organizational structures, object codes & accounts. Develop & provide User Training Manual & Courses.

10% OPERATIONAL MANAGEMENT

Provide day-to-day financial & administrative management in support of multiple administrative units' operational budgets. Provide campus-wide financial & operational management of various VCR research initiatives & programs, TM&CR entrepreneurial seed funding grants, Research initiatives & seed funding, & a host of other programs & initiatives (Example: RISE, IFHS, STAIR Program, AB-2664 Funding, BGI program, DOE Labs joint funding/seed programs, etc?). Independently provide financial support & operational management for the IT Quali & IT Operation Directors. Manage the OR equipment replacement program & special projects as assigned.

Work at a computer terminal for extended periods.

Physical Demands:

Ergonomic-friendly desk arrangements are available.

Work in a busy office with constant interruptions, traffic, and noise from computers, printers, ringing telephones, and conversations.

Work Environment:

Vacation is restricted during fiscal close periods, primarily May through mid-July.

Travel between campus locations, and between on- and off-campus locations.

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 Required:

This position is a critical position and subject to a background check. Employment is contingent upon successful completion of background investigation including criminal history and identity checks.

Yes

QUALIFICATIONS

Experience preparing financial reports, developing long and/or short term financial projections, performing budgetary planning and developing and monitoring budgetary processes.

Experience using Excel skills to compile big data and work with complex databases and financial systems.

Experience designing workflow and integration techniques.

Experience/knowledge working with computerized dashboards, trend analysis, and other key performance indicators. Ability to problem-solve operational systems.

Minimum Qualifications:

Experience working with Generally Accepted Accounting Principles (GAAP) and techniques to apply to budgeting, financial planning & forecasting, rate development, and financial reporting.

Experience using Microsoft Office products (Word, PowerPoint, etc?) and other automation tools to perform complex analysis, streamline processes, and prepare high-quality reports and presentations.

Interpersonal and communication skills to interact and communicate professionally and collaboratively with senior leaders, academic directors, management, and staff using diplomacy during all interactions in the performance of responsibilities.

Skills to develop, interpret, and present financial data to various stakeholders at all levels and across organizational line.

Background in Finance or Accounting.

Experience with systems and database management.

Knowledge and experience with programming languages.

Preferred Qualifications:

Knowledge of business practices and operations.

Knowledge of University of California policies and procedures pertaining to financial administration, payroll, personnel, and other business-related activities.

SIGNATURES

Employee

I have read this position description and understand its contents.

Date

Supervisor

This position description accurately describes the essential responsibilities assigned to this position..

Date

Department Head

This position description accurately describes the essential responsibilities assigned to this position..

Date