

ROBERTS WESLEYAN UNIVERSITY

Job Description

Job Title

Budget Director and Senior Financial Analyst

Department

Finance

Reports To

Controller

Written

November 2025

Status

Exempt

JOB SUMMARY: Reporting to the Controller, the primary responsibility of the Budget Director and Senior Financial Analyst is to review and analyze financial data for both the Finance Department and the entire institution. A significant focus of this analysis will be to help the institution identify efficiencies and improve fiscal performance. The analyst also supports the institution's budgeting, reporting and audit processes. This individual will assist with a portion of the general ledger reconciliation and closing processes.

Job Responsibilities:

1. Create various tools that help teams identify process improvements and conserve resources.
2. Oversee analysis of data and data reporting tools such as the institution's contribution margin analysis.
3. Provide primary institutional support, including data management and analysis, during the budget process, including creating and maintaining the budget model.
4. Assist with continuous improvement and development of budget and financial models.
5. Assist in preparing monthly and annual budget-to-actual analysis for the institution.
6. Communicate budget variances and trends within the finance department, and assist with communication of such information with departmental budget managers.
7. Educate and assist departmental budget managers with budget awareness, and provide internal customer support to these colleagues.
8. Assist in implementing strategies for improving the budget process.
9. Ensure compliance with institutional policies and procedures.
10. General ledger processes as assigned, to include month-end close and year-end close processes.
11. Maintain and create general ledger reporting through Management Reporter.
12. Perform monthly maintenance on the University's internal statements of profit and loss and balance sheets.
13. Prepare analyses and perform reconciliations for the annual financial statement audit and other audits as assigned.

14. Create and oversee various tools to assist departments with internal and external reporting.
15. Other duties as assigned to support the Controller, Chief Financial Officer, and Finance Department.

The approved salary for this position is \$70,000.00 - \$75,000.00

Education and Experience:

- Bachelor's degree in Accounting, Finance or related field and minimum three years related experience preferred. Previous experience in budget analysis from higher education or non-profit sector preferred.
- Knowledge and work experience in general accounting practices / procedures, preferably related to non-profit GAAP.
- Must be highly proficient in MS Excel and demonstrate proficiency in handling and analyzing large data sets. Strong proficiency in other general computer systems required. Previous experience with Microsoft Dynamics (Management Reporter and Great Plains) preferred.

Consequence of Error

Error in judgment or work performed could cause damage to the institution. Poor communication may lead to confusion or poor decisions.

Level of Supervision

Broad guidelines provided for independent choice of methods for accomplishing work.

Directs Work of Others and/or #of Employees Supervised

This position does not have supervisory responsibilities.

Confidential Data

This position will handle general and financial information regarding the University that is confidential. Maintaining confidentiality is critically important.

Mental/Visual Demand and Physical Effort

Negligible physical effort required. Must be accurate, organized, and able to focus on detailed information for extended periods.

Environment

Standard office environment.

Standards of Performance:

- Must exhibit exceptional organizational skills and ability to work with minimal supervision
- Must have demonstrated ability to meet deadlines and maintain schedules.
- Strong communication skills, both written and oral are required.
- Must be detail-focused and work with a high degree of accuracy.
- Must be motivated to dig into detailed analysis to understand issues and developing trends; must be able to convert and organize data into meaningful information with speed and accuracy.
- Ability to see potential solutions and work independently or in groups to implement solutions is required.
- Ability to maintain professional relationships with staff and faculty is required, as is a strong sense of teamwork and cooperation.