

BUDGET & FINANCE OFFICER

DEFINITION

Under the direction of the Chief Financial Officer this classification oversees budget planning, development, and administration and financial analysis, expenditure and revenue forecasting, and reporting for assigned departments, programs, grants, and projects. This position ensures accurate and timely budget and financial reporting to external funders, auditors, and regulatory agencies. In addition, this position ensures financial integrity, alignment, and reconciliation of financial, banking, budgeting, purchasing, and position control systems and processes.

SUPERVISION RECEIVED AND EXERCISED

Receives direct supervision and guidance from the Chief Financial Officer and may supervise one (1) entry level Analyst or administrative staff.

CLASS CHARACTERISTICS

Outlined below is a more detailed, but not an exhaustive list of job duties and responsibilities the Budget & Finance Officer position will be expected to perform. While this list is not exhaustive, it outlines some of the possible duties and responsibilities to be performed as a Budget & Finance Officer.

Management reserves the right to add, modify, change, or rescind the work assignments of different positions to make reasonable accommodation so that qualified employees can perform the essential functions of the job .

Examples of Typical Essential Job Duties (Illustrative Only)

- Lead and manage ongoing budget research, analysis, planning, development, forecasting and reporting for assigned departments, programs, projects, grants, and projects.
- Serve as lead and primary point of contact for organization wide (including all related entities) budget and financial forecasting and reporting systems' contractors/vendors for troubleshooting, problem resolution, upgrades, enhancements, deployments, testing, and documentation.
- Collaborate with Finance staff to understand functional requirements and process changes required to fully utilize automation solutions.
- Research, troubleshoot to identify automated financial, budgeting, purchasing, position control systems solutions, issues, recommended corrective actions.
- Ensure ongoing maintenance and integrity of master data, transactional data, and data flows within financial, accounting, payroll, budgeting, reporting, and purchasing systems.
- Oversee implementation of workflows and role mapping for systems and staff procedures to maximize use of automation tools.
- Partner with Information Technology Department and Program Departments to ensure integrity of data migration, extrapolation, and consolidation.
Serve as Finance Department systems' administrator for accounting, budgeting, payroll, reporting, and purchasing systems; establish user roles, access, and permissions to maintain internal control environment.
- Develop and deliver user training, establish procedures and systems documentation for budgeting and financial reporting areas of responsibility.
- Translate complex financial and budgeting systems structures, cross walks, and mapping of common data elements for consolidated reporting and financial dashboards.
- Develop and prepare custom, ad-hoc, and standard financial reports.
- Lead projects and provide technical guidance for reporting and analytics requests, and data integration.

- Collaborate and coordinate with departments and programs for data sharing and reporting.

QUALIFICATIONS

Any combination of training and experience that would provide the required knowledge, skills, and abilities is qualifying along with requisite licensure / certifications to perform the job.

Knowledge

Sufficient education, training and experience which demonstrates possession of the following knowledge:

- Budgeting, cost allocation methodologies, data analytics, business intelligence, and data visualization software (i.e., Power BI, Cognos, Tableau, SAP Business Objects, SAP Analytics, etc.) or other reporting software, financial applications, spreadsheets, and statistics is required.
- Design of financial reports, dashboards, and financial performance management.
- General Ledger and Chart of Account structures and layouts.
- Accounting and budgeting principles, practices, and workflows.
- Treasury operations, accounting, finance, cost allocation and braided funding streams and their interdependencies.
- Auditing principles and methods to ensure the validity and financial integrity of financial reports.
- Qualitative and quantitative evaluation principles and processes to ensure financial compliance with funders and regulatory requirements.

Ability

Sufficient education, training and experience which demonstrates the possession of the following abilities:

- Develop and employ mathematics, statistics, and computer science methods and tools to manage large financial data sets, data warehouse dimensional modeling, and data analytics methods to communicate outcomes, trends, and comparative analysis across multiple financial, payroll, and purchasing systems.
- Strong work ethic with a commitment to fiscal integrity and personal accountability.
- Work independently, with minimal guidance and supervision.
- Take initiative, Proactive, seeking to continually improve business processes.
- Work collaboratively and successfully within a team.
- Work in an environment that requires flexibility to meet changing needs or demands.
- Produce accurate work products, multi-task, meet deadlines, and achieve results in a high demand and fast paced environment.

A typical way to obtain the required qualifications would be through the following education and experience:

Education

- B.A. Degree in Accounting, Finance, Auditing Economics or Business Administration from an accredited college or university.

Experience:

- Five (5) years' experience at the Senior Budget Analyst, Senior Accountant, Senior Auditor or equivalent position with responsibility overseeing accounting, budgeting, or auditing functions for multiple departments, programs, projects, and grants, preferably in a nonprofit or public entity.
- Extensive formal responsibility and experience interpreting federal, state, and local governmental regulations, financial funding requirements, and developing and managing budgeting operations.
- Experience developing and maintaining cost allocation models for revenue and expenses and supporting accounting ledgers and documentation.
- Experience performing formal financial/accounting compliance audits.

PHYSICAL DEMANDS

Must possess mobility to work in a standard office setting and use standard office equipment; vision to read printed

Budget & Finance Officer

September 21, 2025

Initials

materials and a computer screen; and hearing and speech to communicate in person and over the telephone. This is primarily a sedentary office classification although standing in work areas and walking between work areas may be required. Finger dexterity is needed to access, enter, and retrieve data using a computer keyboard or calculator and to operate standard office equipment. Positions in this classification occasionally bend, stoop, kneel, reach, push, and pull drawers open and closed to retrieve and file information. Employees must possess the ability to lift, carry, push, and pull materials and objects up to 10 pounds.

ENVIRONMENTAL CONDITIONS

Employees work in an office environment with moderate noise levels, controlled temperature conditions, and no direct exposure to hazardous physical substances.

I have read and understand the duties and responsibilities of my position as a Budget & Finance Officer. I understand that this job description should in no way be construed as a contract for employment, but rather is intended to indicate the general nature and level of work to be performed. Nothing in this job description restricts management's right to assign or reassign duties and responsibilities to or from this job at any time. It is not designed to contain nor be interpreted as a comprehensive account of all the responsibilities and/or qualifications required of an employee assigned to this job. These job duties may be subject to change at any time due to reasonable accommodation or other reasons. Further, I understand that if I have any physical limitations or require any accommodation to perform the essential functions of my job, I must immediately inform my manager and/or Human Resources.

Employee Signature

Signature Date

Employee Name