Job Description - Sr. Budget Analyst

**Position Title:** Sr. Budget Analyst  
**Job Family:** Financial  
**Pay Grade:** 40  
**Position Number:** #45.1

**General Summary:**

Coordinates and oversees budgeting activities related to departmental and sponsored budgets, including revenues and gift accounts. Analyzes financial data and develops moderately complex reports for forecasting and results analysis. Assists in financial studies regarding projected changes in revenues and expenditures. Oversees revenue and expense budgets, including grants and contracts in post award period. Ensures compliance with university and/or agency regulations and restrictions. May train others in budget related policies and procedures.

**Essential Job Functions:**

Analyzes complex financial data and extracts and defines relevant information; interprets data for the purpose of determining past financial performance and/or to project a financial probability.

Coordinates and assumes a leadership role in the development of unrestricted funds budgets and research grants and contracts, including revenues and gift accounts. Analyzes budget patterns, projects expenditures, and prepares approved budget.

Compiles working papers and approved budgets; ensures that expenditures for budgets, grants, and contracts are monitored and that reports are prepared to maintain balanced accounts.

Assists in the development of management, narrative, and statistical reports for private and government donors.

Develops moderately complex financial reports for forecasting, trending, and results analysis.

Monitors, identifies, and communicates over-expenditures to faculty and administrative staff. May resolve funding shortfalls.

Monitors receipt of payments from sponsors. May participate in the development of payment schedules.
Keeps abreast of laws and regulations that apply to a particular staff function or field of professional expertise to maintain up-to-date compliance.

Uses appropriate cost rates, such as indirect and benefit rates for proposed budgets. Reviews budget justification to ensure it relates to budgeted dollars. Confirmsthat anticipated promotions and other increases are calculated into the cost of project. Ensures compliance with all relevant university and/or agency regulations and restrictions.

Sets up budget accounts once award(s) has been granted or contract(s) signed. Administers the expenditure of funds, ensuring that funds are expended according to sponsoring organization's stipulations and appropriate university guidelines.

Confers with appropriate internal and external administrative offices to ensure that required procedures are followed. Provides instruction and answers questions relating to budget procedures and serves as liaison between the business office and unit areas. Identifies budget issues, provides alternative solutions, and resolves problems.

Monitors and approves expenditures throughout the budgetary period.

Prepares and processes payroll documents needed to implement payroll/personnel transactions. Applies knowledge of procedures to review and record personnel activities of individuals compensated through federally-funded projects.

Maintains individual attendance records and payroll processing.

Uses various software applications, such as spreadsheets, relational databases, statistical packages, and graphics packages to assemble, manipulate and/or format data and/or reports.

**Scope of Responsibility:**

Knows the formal and informal departmental goals, standards, policies and procedures which may include some familiarity of other departments within the school/division. Is sensitive to the interrelationship of both people and functions within the department.

**Decision Making:**

On a regular and continuous basis, exercises administrative judgment and assumes responsibility for decisions, consequences, and results having an impact on people, costs, and/or quality of service within the functional area.
Authority:
May assist in directing activities of staff or a function.

Communication:
Exchanges non-routine information using tact and persuasion as appropriate requiring good oral and written communication skills.

Education:
Required: Bachelor's degree in accounting, business, related field, or equivalent experience

Experience:
Four years related experience required. Additional education may be substituted for some experience. Proficiency in the use of software applications, databases, spreadsheets, and/or word processing required.

Certification:
Required: No Requirements

Physical Requirements:
Sitting in a normal seated position for extended periods of time

Reaching by extending hand(s) or arm(s) in any direction

Finger dexterity required to manipulate objects with fingers rather than with whole hand(s) or arm(s), for example, using a keyboard

Communication skills using the spoken word

Ability to see within normal parameters

Ability to hear within normal range

Ability to move about

This description is a general statement of required major duties and responsibilities performed on a regular and continuous basis. It does not exclude other duties as assigned.

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