

**USF Job Class Description**

JOB CODE: 1116

JOB TITLE: Budget Planning

Specialist

JOB FUNCTION: Administration &amp;

Business Services

PAY PLAN: 23

CAREER BAND: D

FLSA: Non-exempt

Effective Date: 04/01/07

**Job Title: Budget Planning Specialist****Job Summary**

A Budget Planning Specialist processes budget transactions and implements cyclical budget planning and reporting processes for a VP office or budget office at the campus or University level. This position serves as a liaison for colleges, divisions, or departments by providing data and guidance on budget policies, procedures, and transactions. The Budget Planning Specialist compiles data for regular budget reports, and assembles ad hoc reports as requested by administrators.

**Nature of Work**

This position typically reports to a Budget Director and performs a variety of transactions, analyses, and reports in support of budget processes. The position oversees reserve fund balances, prepares budget and expenditure transfers, and advises departments on appropriate steps to reconcile accounts. The position reviews budgetary documentation from departments for appropriate justification and effectiveness. The position creates and runs queries on budget data, and prepares summaries for inclusion in year-end reports. The position works with multiple funding sources which may include Educational & General, Financial Aid, Student Activity, Fees, Concessions, and Auxiliary Enterprises. This position differs from a Budget Analyst by providing administrative support to a budget professional, rather than having the principal responsibility for budget reporting and reconciliation. The position differs from a Fiscal and Business Analyst since the position does not conduct general fiscal transactions, but rather monitors controls and analyzes budget transactions for a central budget unit.

**Examples of Duties**

The following list provides examples of the most typical duties for positions in this job class. Individual positions may not include all of the examples listed, nor does the list include all of the work that may be assigned to positions in this job class.

- Oversees reserve funds, prepares budget transfers and reconciles accounts.
- Monitors budget transfer activity through the year to ensure that proper documentation is supplied and that transactions are properly authorized.
- Develops queries to provide information on budget transfers, budget balances, missing fields, and position budget data.
- Acts as a liaison with University departments and provides budgetary consultation as appropriate.

- Prepares regular and ad hoc reports to support budget planning, salary rate analysis and/or revenue projections.

**Minimum Qualification Requirements**

This position requires a High School diploma and six years of related experience in an accounting or budgeting function. Appropriate college coursework or vocational/technical training may substitute at an equivalent rate for the required experience.