

# Financial Analyst #27438

## Job Description

**Department:** Cal Performances  
**Classification:** FINANCIAL ANL 3  
**Title Code:** 007709 Exempt  
**Percent Time:** 100 %  
**Supervisor's Title:** Director of Finance and Administration  
**Personnel Program:** Personnel Policy for Staff Members (PPSM)

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### Introduction

Cal Performances is the performing arts presenting, commissioning, and producing organization based at the University of California, Berkeley. The mission of Cal Performances is to produce and present performances of the highest artistic quality, enhanced by programs that explore compelling intersections of education and the performing arts. The organization delivers a diverse artistic and educational mission to the University and surrounding communities, as well as internationally through its digital platforms, maintaining a budget size of roughly \$18M and roughly 60 career staff with hundreds of part-time employees, volunteers, and student partners.

Reporting to the Director of Finance and Administration, the Financial Analyst is responsible for supporting a wide range of financial services such as budget, financial, or resource analysis projects, preparing complex analysis to understand past performance and determine present and future performance and/or resource allocations. The position supports maintenance of the department chart of accounts or other data management tools, and related business processes. Additionally, the Financial Analyst will be involved in developing, interpreting, and implementing financial concepts for financial planning, resource planning (dollars), and control of the organizational budget. The Financial Analyst may also analyze and prepare recommendations for financial plans, including annual resource allocations, future requirements, and operating forecasts. Lastly, the Financial Analyst will collaborate with other functional areas within the unit providing budget analysis and reporting.

### Responsibilities

Duties include but are not limited to:

Under the direction/guidance of the Director of Finance and Administration, will assist in overseeing and coordinating the annual internal unit budget process. Works with the unit's budget managers to create detailed annual budgets. Prepares and distributes regular and ad hoc reports and analyses to include summaries of financial transactions, budget reports, etc. to be used for management review and decision-making.

Develops key management reports to enable decision making, provides analysis and performance metrics to measure our performance against budget targets throughout the year, ensuring fund/department balances avoid deficits and ensuring department revenue/expenses are booked appropriately.

Serves as a subject matter expert to colleagues as it relates to our financial management technology systems and educates stakeholders how to use financial tools.

Provides analytical support for complex budget, financial, or resource analysis projects which also includes Fiscal Close.

Monitors business and financial administrative services (including procurement, travel and entertainment processing, and pre- and post-research administration coordinating role to ensure smooth handoff and delivery of service between the department managers and central services.

Provides department support in the areas of business process analysis and design, system or procedure testing and implementation, documentation, security, workflow, and customer feedback. Develops and maintains Financial Services documentation to ensure staff is knowledgeable about financial processes and procedures.

Coordinates and prepares financial journal entries and department budget allocations. Maintains the Department Chart of Accounts architecture or other data management tools, and related business processes.

Gathers, analyzes, prepares and summarizes recommendations for financial and/or resource plans, including annual resource allocation approaches, trending future requirements, operating forecasts, sources and uses, et cetera. Performs complex financial and resource research and studies for unit, internal departments and external constituents: generating, modifying and conceiving of financial and other resource reports, analyzing and forecasting staff salary budgets, contracts, grants, gifts, endowments, and recharges.

Helps to develop a control environment in all departmental units to promote structured checks and balances. Assists and coordinates, as directed, developing analysis and obtaining documents in support of an audit response.

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### **Skills, Knowledge & Abilities**

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#### **Required Qualifications**

- Has thorough knowledge of finance policies, practices, and systems or a demonstrated ability to develop knowledge quickly.
- Has demonstrated ability to independently gather, organize, and perform financial analysis assignments including budget preparation and recharge rates.
- Strong interpersonal skills, political acumen, and demonstrated capability to gain the respect of others, influence people of varying levels of authority in multiple organizations, and elicit cooperation without direct authority.
- Must have excellent verbal and writing skills.
- Ability to work collaboratively as part of a diverse, high performing team, leveraging the insights of others to optimize solutions.
- Proven track record of success and a strong customer focus (makes customer needs a priority, practices active listening, engages collaboratively with a broad, multi audience constituency).
- Ability to contribute to an inclusive and equitable culture in a diverse workplace.
- Excellent project management skills: ability to break down objectives into tasks and schedule tasks and resources to meet objectives.
- Expertise in business rules associated with Berkeley's financial systems and associated data structures.
- Ability to develop and do ad hoc querying – utilize common data mining tools to develop custom queries to extract required data from data warehouse.
- Advanced MS Excel skills; creative and expert use of other productivity technology tools (e.g., Visio, PowerPoint, Project) to meet deliverable requirements.

- Knowledge of ERP systems and related technologies. Requires ability to present information in a clear and concise manner both in writing and verbally.
- Experience with contributing to and guiding change management and communications plans related to financial business process and financial systems changes.
- Ability to guide the development of business process focused documentation and training content that will illustrate concepts for a variety of audiences.
- Thorough knowledge and understanding of internal control practices and their impact on protecting University resources.
- Understanding of Generally Accepted Accounting Principles
- Ability to successfully pass background investigation required.

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