Position Summary

Financial Specialist

Purpose

Perform financial and business-related analysis and research. Prepare monthly and quarterly financial reports and monitor daily financials of research/grant accounts.

Primary Functions

• Coordinates development, maintenance, implementation, and documentation of financial operations.
• Prepares reports, ad hoc analysis, and transactional activities required to support financial analysis functions.
• Verifies accuracy of reporting data, financial performance indicators, and computes basic financial arithmetic.
• Prepare and provide various monthly and quarterly financial reports for analysis and projections.
• Monitor and review expenditures against the approved budget; confirm accounts and account balances.
• Monitor daily financials of research/grant accounts to assure appropriate spending within grant guidelines and MCW policies.
• Track labor expenses by account.
• Process Funding Reallocation Forms for CIBMTR faculty and staff labor distribution changes. Monitor grant subawards and process invoices for payment.
• Participate in grant application and closeout activities, including eBridge entry and maintenance.
• Create and maintain databases of funding sources and uses.
• Prepare and submit invoicing to sponsors.
• Respond to routine financial inquiries.
• Run monthly Oracle financial report package and other system reports as needed
• Assist in special projects as needed.

Knowledge – Skills – Abilities

Knowledge of economics, accounting, mathematics, administration, English language, law, government, and human resources.

Work requires resource management, mathematics, problem solving, coordinating work activities, critical thinking, systems analysis, operations analysis, time management, writing, active listening, and active learning skills.

Speech clarity, speech recognition, finger dexterity, and wrist-finger speed while operating computers abilities required.

Organizational Structure

Building: Clinical Cancer Center
Department: Medicine
Division: CIBMTR
Reports to (Title): Business Manager Sr
Direct Reports (Titles): NA
Collaborates with (Titles): CIBMTR Executive Director, Financial Associate, CIBMTR Program Directors and Coordinators

Specifications
Appropriate education and/or experience may be substituted on equivalent basis
Minimum Required Education: Bachelor’s degree
Minimum Required Experience: 6 months
Preferred Education: Business or Finance degree preferred
Preferred Experience: Financial experience in an academic setting preferred
Field: Business
Certification: CITI training required within 90 days of hire. IT security compliance training (internal CIBMTR) required within 60 days of hire.

Classification
Grade Name 11
Full-Time Equivalent 1.0
FLSA Status Exempt
FLSA Test Administrative
Workweek Full-time role with expectations for coverage during core business hours and flexibility required as necessary to accommodate business needs.
Job ID 304
Job Name Data Analyst
Position Category Professional Services - Finance

Job Scope
Complexity – regularly applied judgment to accomplish tasks; develops policies and procedures
Impact – errors may cause moderate to serious damage; accuracy highly important
Autonomy – performs work independently with regular check-ins; supervision available as needed
Communication – occasionally resolves conflicts; adapts communication style to audiences
Responsibility – advises others
Confidentiality – regularly prepares and uses confidential information
Leadership – acts as a role model

Physical Requirements
Work requires occasionally lifting moderate weight materials, standing, or walking continuously.

Risk Potential
Little or no exposure to hazards such as dust, fumes, or extreme temperatures, airborne or blood borne pathogens, extreme temperatures, or allergens.

Sensory Acuity
Ability to detect and translate speech or other communication required. May occasionally require the ability to distinguish colors and perceive relative distances between objects.
Work Environment
Occasional exposure to dust, noise, temperature changes, or contact with water or other liquids. Work is performed in an environmentally controlled environment.

Performance Dimensions

Collegiality
Exhibit confidentiality, honesty, and actions that build trust and strengthen relationships. Listen to others and effectively communicate in a clear and concise manner through written and verbal communication. Demonstrate respect and commitment to the values of diversity and equity; seek out and incorporate diverse perspectives into decision making.

Excellence and Creativity
Exhibit initiative and ingenuity by taking ownership of tasks to proactively improve services, avoid problems, or develop opportunities. Generate novel and valuable ideas to impact institutional missions. Identify and implement new methods to increase efficiency and quality.

Education and Development
Displays an ongoing commitment to continuous learning and self-improvement in one's area of responsibility. Actively seek out mentorship and learning opportunities that can be applied to current and future work activities. Develop and maintain professional affiliations. Participate in design, development, and/or evaluation of instructional materials, methods, courses, or programs.

Agility and Judgment
Remain flexible and versatile in rapidly changing environment and adapt quickly to changing circumstances. Change behavioral style or method of approach when necessary to achieve a goal. Make timely and sound decisions based on analysis of information, experience, and logic. Show reliability and accountability in the successful completion of all work.

Stewardship and Institutional Citizenship
Support transformational change to achieve institutional vision and strategies. Be an active and thoughtful participant in institutional initiatives, meetings, and committee work. Conserve resources and use in an efficient and cost effective manner across all institutional missions. Look for ways to improve and promote quality within area of influence.

Disclaimers

Background Check
Employment in this position may be contingent upon successfully completing a background and criminal history check, caregiver background check in accordance with the Wisconsin Caregiver Background Check Law, physical examination, and / or driving record check.

Equal Opportunity Employer
The Medical College of Wisconsin is an affirmative action / equal opportunity employer and does not discriminate in hiring or employment on the basis of age, sex, race, color, religion, national origin, veteran status, disability, or sexual orientation.

Diversity and Inclusion
The Medical College of Wisconsin defines diversity as a commitment to recognizing and appreciating the variety of individual differences in an environment that promotes and celebrates individual and collective achievement. The diversity of MCW continues to be an important source of innovative ideas and creative accomplishments.

Confidentiality
Employees that have access to MCW, affiliate, subsidiary, or student data or Protected Health Information (PHI), or research protected information are obligated to protect the confidentiality and proper use and access of this information in order to prevent loss, misuse, unauthorized access, unnecessary identification, or security breaches.

Completeness
This job description is not an employment contract and the Medical College of Wisconsin may modify this document at any time. This document is intended to indicate the types of tasks and levels of skill, effort, and responsibility required by positions assigned this title. This information shall not be construed as a declaration of the specific duties and responsibilities of any particular position. It is not intended to limit or modify the right of any supervisor to assign, direct, and control the work of direct reports. The functions described are not to be interpreted as exclusive or all-inclusive of the various functions performed.

Effective Date: