

UW HEALTH JOB DESCRIPTION

Budget Consultant

| | | | |
|---|----------------------------|--------------------------------|-----------------------|
| Job Code: 440105 | FLSA Status: Exempt | Mgt. Approval: K. Klein | Date: May 2021 |
| Department: Finance – Operating Budget | | HR Approval: J. Theisen | Date: May 2021 |

JOB SUMMARY

The Budget Consultant is responsible for leading, analyzing, and monitoring the budget process including the applicable software. This position will provide process management, technical knowledge, budget analysis and support to the Finance Department and to other departments and teams across the UW Health system. The Budget Consultant will utilize generally accepted accounting principles (GAAP) and healthcare financial accounting and reporting standards to complete UW Health's annual budget and to ensure that UW Health's budget process and the budget software, align.

The Budget Consultant will optimize, review & validate budget tiles, identify reporting needs & validate budget reports. This position will troubleshoot budget software issues and prioritize budget software work. The Budget Consultant will complete special projects related to the budget as assigned and will review and analyze departmental output and associated applications. The Budget Consultant works closely with end users and leaders across the UW Health System.

MAJOR RESPONSIBILITIES

- **Lead Budget Process and Deliverables**
 - Oversees existing annual financial budget processes throughout the organization; including but not limited to developing timelines and project plans, communicating clearly at all levels, reaching consensus with executive leaders on strategy, and ensuring the final plan is approved at all levels.
 - Monitor for and answer questions, update documentation, FAQ, and training as appropriate. Responds to all levels of management as needed for information requests as they relate to financial statements, budgets, projections, and other Accounting related areas.
 - Help orchestrate duties for and ensure current operational budget process meets goals
 - Develops and prepares financial and statistical analyses, graphs, and presentation materials including auditing and tie outs to sources of truth; provides analytical support for the finance team and operational partners.
 - Maintains existing budget operating statements, including but not limited to the balance sheet, income statement, and profit and loss statement
- **Develop Budget Competency**
 - Actively develop budget competency in core budget team and finance business partner team, incorporating feedback into training related to challenges with current process and enhancement with industry best practices
 - Develop trusted advisor relationship with internal and external stakeholders, leveraging operational knowledge, budget knowledge, and technical skills.
 - Mentor existing and new staff and ensure cross training plan to ensure coverage for all critical tasks
 - Develop classroom materials and train internal finance and system users for existing and enhanced budgeting processes
- **Drive budget process enhancements/improvement**
 - Drive the vision of the budget process. Leverage professional associations and colleagues to understand industry best practice
 - Push to leverage existing organizational relationships to extend budget processes across the system (i.e...SAHS, Meriter)
 - Proactively researches and calculates the impact of operational changes to budget, financial data, financial systems, etc. and the impact of the changes to the organization.

JOB REQUIREMENTS

| | | |
|---------------------------|-----------|---|
| Education | Minimum | Bachelor's Degree in Accounting, Finance, Business or another related field. Four (4) years of relevant finance or accounting experience may be considered in lieu of the degree in addition to the experience below. |
| | Preferred | Master's Degree in Accounting, Finance, Business or another related field |
| Work Experience | Minimum | Four (4) years of experience in accounting or finance that includes experience with budget software, spreadsheet and database applications, data flow, report creation, and data interpretation |
| | Preferred | Six (6) years of experience in accounting or finance within a healthcare setting |
| Licenses & Certifications | Minimum | |
| | Preferred | |

UW HEALTH JOB DESCRIPTION

| | |
|---|---|
| Required Skills, Knowledge, and Abilities | <ul style="list-style-type: none"> • Knowledge of Generally Accepted Accounting Principles and governmental regulations as applied to modern health care financial management. • Knowledge of the principles of statistical analysis as applied to the development and design of financial reporting • Thorough knowledge of and experience in financial system applications and software • Experience in database development and management • Leverage organizational knowledge, history, and background to facilitate understanding and clear communication around actual performance against operating plans/standards and interprets the results for all levels of management. • Experience in Microsoft Office Suite (Excel, Access, Word, Outlook) • Ability to work effectively and independently managing tasks in a fast-paced environment • Ability to function independently and deal with multiple simultaneous projects of significant complexity and risk • Develop, maintain, and implement technical learning in self and others critical to running or enhancing budget operations (i.e...Groovy, SQL, VBA, etc) • Develop and maintain budget system knowledge to enhance troubleshooting, data awareness, issue free upgrades • Excellent written and verbal communication skills • Analytical and problem-solving abilities with the ability to manipulate and understand complex information • Effective organizational and time management skills with proven ability to meet deadlines • Apply critical thinking with technical skills to bug fix / enhance system processes and drive efficiencies |
|---|---|

PHYSICAL REQUIREMENTS

Indicate the appropriate physical requirements of this job in the course of a shift. *Note: reasonable accommodations may be made available for individuals with disabilities to perform the essential functions of this position.*

| Physical Demand Level | | Occasional Up to 33% of the time | Frequent 34%-66% of the time | Constant 67%-100% of the time |
|---|---|-------------------------------------|---|---|
| X | Sedentary: Ability to lift up to 10 pounds maximum and occasionally lifting and/or carrying such articles as dockets, ledgers and small tools. Although a sedentary job is defined as one, which involves sitting, a certain amount of walking and standing is often necessary in carrying out job duties. Jobs are sedentary if walking and standing are required only occasionally and other sedentary criteria are met. | Up to 10# | Negligible | Negligible |
| | Light: Ability to lift up to 20 pounds maximum with frequent lifting and/or carrying of objects weighing up to 10 pounds. Even though the weight lifted may only be a negligible amount, a job is in this category when it requires walking or standing to a significant degree. | Up to 20# | Up to 10# or requires significant walking or standing, or requires pushing/pulling of arm/leg controls | Negligible or constant push/pull of items of negligible weight |
| | Medium: Ability to lift up to 50 pounds maximum with frequent lifting and/or carrying objects weighing up to 25 pounds. | 20-50# | 10-25# | Negligible-10# |
| | Heavy: Ability to lift up to 100 pounds maximum with frequent lifting and/or carrying objects weighing up to 50 pounds. | 50-100# | 25-50# | 10-20# |
| | Very Heavy: Ability to lift over 100 pounds with frequent lifting and/or carrying objects weighing over 50 pounds. | Over 100# | Over 50# | Over 20# |
| Other - list any other physical requirements or bona fide occupational qualifications not indicated above: | | | | |

Note: The purpose of this document is to describe the general nature and level of work performed by personnel so classified; it is not intended to serve as an inclusive list of all responsibilities associated with this position.