



## **APPLY ONLINE**

### **Position Summary**

#### **Financial Associate**

##### **Purpose**

Under the direction of the CIBMTR Finance and Administration Program Director and Financial Analyst perform varied and more difficult financial and business-related analysis and research. Prepare financial analysis and projections and analyze funding resources.

##### **Primary Functions**

- 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.
- Conducts financial analysis and applies mathematical models of financial or business conditions.
- Analyze appropriate funding sources and availability of funds for purchases and expenses; monitors purchase orders and key accounts on an ongoing basis.
- Monitor and review expenditures against the approved budget; confirm accounts and account balances.
- Participate in Corporate proposal budget process, including eBridge entry and maintenance.
- Manage corporate database, purchase order creation, prepare and submit invoicing to sponsors.
- Manage PhD Biostatistics consulting hours and invoicing/
- Create quarterly forms reimbursement report and reconciliation.
- Reconcile monthly financial statements; maintain grant and contract management tools.
- Prepare financial analysis and projections for use in budget and strategic planning.
- Respond to routine and complex financial inquiries.
- Provide financial information for special projects; support CIBMTR financial reporting requirements.
- Process Funding Reallocation Forms for CIBMTR faculty and staff labor distribution changes.
- Participate in annual budget process.
- Participate in grant closeout activities.
- Run monthly Oracle financial report package and other system reports as needed.
- Assist with special projects as needed.

##### **Knowledge – Skills – Abilities**

Knowledge of technical, business, consultation, project management, and cultural awareness.

Customer focus, building trust, communication, critical thinking, and influencing skills.

##### **Organizational Structure**

Building: Clinical Cancer Center

Department: Medicine

Division: CIBMTR

Reports to (Title): Financial Analyst

Direct Reports (Titles): NA

Collaborates with (Titles): CIBMTR Finance and Administration, Corporate Office and Business Operations.



**Specifications**

*Appropriate education and/or experience may be substituted on equivalent basis*

Minimum Required Education: Bachelor's degree

Minimum Required Experience: 2 years

Preferred Education: Business or finance degree preferred

Preferred Experience: Financial grant 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	13
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	Financial Associate
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 (PI), 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:**