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Position Summary

Financial Specialist

Purpose

Under the direction of the CIBMTR (Center for International Blood and Marrow Transplant Research) Financial Analyst 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.
- Prepare weekly analysis of committed costs report.
- Prepare cash flow statements.
- Monitor daily financials of corporate accounts to assure appropriate spending within grant/contract guidelines and MCW policies.
- **Monitor project budget accounts and expenditures.**
 - Monitor MCW Oracle project accounts, including assessing salaries based on awarded Sponsor budget.
- **Monitor purchase orders (PO) and commitments for sufficient funds.**
 - Process PO's through MCW iProcurement system for fully executed agreements/subcontracts.
 - Communicate PO details to appropriate stakeholders and provide a subcontract monitoring tool as needed.
- **Monitor corporate accounts to ensure accuracy of budget assignments and expenditures.**
 - Assess efforts of Personnel awarded in grant/contract budget, including communicating with collaborating departments to assess efforts for their faculty/staff in our awarded grant/contract budgets. Maintain a placeholder tracking sheet for efforts that are in a placeholder account and process an FRF (funding reallocation form) as needed to ensure faculty/staff are charged appropriately.
 - Maintain a line-item budget for each faculty/staff in our division to track their labor distributions.
- **Reconcile various accounts and process invoice payments.**
 - Complete subcontract monitoring tool required.
 - Collaborate with vendors on outstanding invoices to ensure all payments are made within project dates to utilize available funds. Assist in completing final checklists.
- Interact with faculty/staff on grant agency spending policies and procedures.
- Prepare all deposits for external and internal funds received by the Division.
- Assist in preparing and writing grant information for submission.
- Assist in preparing the CIBMTR annual budget.
- Assist in special projects as needed.



Knowledge – Skills – Abilities

Knowledge of economics, accounting, mathematics, administration, English language, law, government, and human resources. Knowledge of Microsoft Office Suite (specially Excel and Access), 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): Financial Analyst
Direct Reports (Titles): NA
Collaborates with (Titles): CIBMTR Finance and Administration Staff, Project Management Office Staff, Data Operations Staff, Scientific Directors, and Senior Leadership

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:
Preferred Experience: Financial and/or grant experience.
Field:
Certification:

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 (MCW) is an Equal Opportunity Employer. We are committed to fostering a diverse community of outstanding faculty, staff, and students, as well as ensuring equal educational opportunity, employment, and access to services, programs, and activities, without regard to an individual's race, color, national origin, religion, age, disability, sex, gender identity/expression, sexual orientation, marital status, pregnancy, predisposing genetic characteristic, or military status. Employees, students, applicants or other members of the MCW community (including but not limited to vendors, visitors, and guests) may not be subjected to harassment that is prohibited by law or treated adversely or retaliated against based upon a protected characteristic.

Diversity and Inclusion

The Medical College of Wisconsin (MCW) is committed to creating an inclusive and welcoming workplace that includes individuals with diverse backgrounds and experiences. We believe that embracing human differences is critical to realize our vision of a healthier world, and we recognize that a healthy and thriving community starts from within. We strive to integrate our human and social differences into MCW's functioning, strategies and culture to create a diverse and equitable workplace. If you believe embracing individuality and working together makes us stronger, then MCW is the place for you. People of color, women, LGBTQIA+, veterans and persons with disabilities are encouraged to apply.

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.