**P6: Level Standards**

**GENERAL ROLE**

This level is accountable for serving in a highly advanced capacity in an area of specialization. The advanced resource capacity must be distinct from the regular or most common provision of work within the area of specialization. Positions at this level are not reflective of the majority of the workforce, but instead the most advanced functions within an area of specialization.

Incumbents:

* Serve in a subject leader and consultative capacity within an area of expertise.
* Set goals and objectives for team members to meet project initiatives and standards.
* Distribute project work.
* Evaluate and monitor the accuracy, quality, quantity, and timeliness to meet project milestones and objects.

**INDEPENDENCE AND DECISION-MAKING**

*🡪 Supervision Receive*d

* Works under direction.
* Seeks approvals when significant changes to process steps are considered and additional resources for task completion are required.

*🡪 Context of Decisions*

* Decisions are driven by departmental policy and procedures.
* Incumbents understand the smallest details of an assigned area.

*🡪 Job Controls*

* Free to plan and carry out all phases of work assignments, including the oversight of project staff.
* Has the latitude to make daily operational project decisions.

**COMPLEXITY AND PROBLEM SOLVING**

*🡪 Range of issues*

* Issues are readily identified but cannot be understood and fixed in simple cause-effect terms.
* Variables affecting the problem are generally known.

*🡪 Course of Resolution*

* Utilizing an understanding of best practices and the way similar units run elsewhere, convincingly recommends, develops, and implements capital and process improvements to the area.

*🡪 Measure of Creativity*

* Problems require integrative solutions such as how technologies, processes, resources, and people all fit together

**COMMUNICATION EXPECTATIONS**

*🡪 Manner of Delivery and Content*

* Deliver statements and information in a combined persuasive and motivational fashion to subordinate staff, departmental and University administrators, and the campus community as a whole.

**SCOPE AND MEASURABLE EFFECT**

* Serve as a lead over major projects within a specific administrative/programmatic function or specialty area requiring specialized education.
* Actions regularly affect a department or an office-centric outcome with departmental impact.
* Actions generally have a direct impact on controlling such things as nature of work and scope of services.
* Actions may have high-risk financial, compliance, political or safety implications.
* Performance results tend to relate to efficiency, degree of waste/cost overruns, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.

**Job Template**

**GENERAL SUMMARY**

Facilitates the preparation of a department’s budget or participates in the preparation of the University’s annual budget document, establishes proper budget controls and maintains, generates and analyzes financial data for decision-making and planning by key University administrators.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Work under direction of a supervisor or manager. Serves a lead worker to employees who perform similar functions.

**ESSENTIAL DUTIES AND RESPONSIBILITIES**

*The intent of this section is to list the primary, fundamental responsibilities of the job – that is, the duties that are central and vital to the role.*

* Act as the primary resource for assigned departmental contacts with regard to all financial management activities.
* Develops and summarizes findings regarding financial plans, operating forecasts, and/or similar complex financial matters. Provides recommendations to leadership.
* Work collaboratively to understand business requirements, conceptualize, develop, and execute financial models in support of strategic programs and initiatives.
* Anticipate, identify, and report potential financial opportunities, issues, risks, ideas, and solutions.
* Keep abreast of developments and trends that may require new studies or modification of current projects or practices.
* Guides and collaborates with peers, both internally and externally, to gather, analyze, summarize, prepare, and present recommendations regarding financial plans, trending future requirements, operating forecasts and/or similar complex financial matters.
* Prepares quarterly and ad-hoc reports for University leadership and various State agencies.
* Influences, plans, and designs methods to improve practices, processes, and systems. Leads and partners with all levels of internal and external contacts to execute departmental and/or institutional level goals.
* Assists in preparing the department and/or University’s budget, including analysis of individual unit budgets and developing updated forecasts.
* Serves as a resource to University departments and administrators regarding financial data and proper budget procedures and practices and resolves related problems. Serves as a resource to department staff to resolve problems and provide technical assistance and advice.
* Performs related work as required.

**MINIMUM QUALIFICATIONS**

* Bachelor’s degree in related field.
* Six to seven years of related experience. One year serving as a senior team member regularly performing the most advanced tasks of the work unit and other team members

**COMPETENCIES**

**Knowledge of:**

* Budgeting and accounting principles and practices
* Policies and procedures governing the operation of the University
* Microsoft Office and related software applications

**Skill in:**

* Planning and organization
* Troubleshooting
* Developing and maintaining effective and appropriate working relationships
* Critical thinking, problem solving and analysis

**Ability to:**

* Communicate effectively through both oral and written means
* Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
* Solve complex financial problems
* Execute financial models in support of strategic programs and initiatives.
* Effectively translate financial and analytical concepts to a wide variety of audiences.
* Maintain the confidentiality of information and professional boundaries
* Work independently to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management.