**P7: Level Standards**

**GENERAL ROLE**

This level is accountable for serving in an expert resource capacity in an area of specialization. Positions at this level are not reflective of the majority of the workforce, but instead the most complex functions within an area of specialization.

Incumbents:

* Serve in a subject leader and consultative capacity within an area of expertise.
* Provide analytical, technical, and advisory support to leaders and decisions makers within the same disciplinary track.
* Lead projects or initiatives within the specific area of expertise, to include leading vendors or cross-functional departments or teams.
* Research and apply better ways to effectively achieve end results by, for example, arranging/rearranging the way work is performed, changing elements of processes, and adding or deleting new or unnecessary capabilities/functionalities as needed.
* Set project objectives, immediate- and/or long-term, as a means to fulfill project initiatives.

**INDEPENDENCE AND DECISION-MAKING**

*🡪 Supervision Receive*d

* Works under general direction.
* Seeks assistance only when unique situations arise, coupled with financial impact to the division and political consequence.

*🡪 Context of Decisions*

* Work is focused on and regulated by specific department/division goals and milestones.

*🡪 Job Controls*

* Act based on own judgement as long as actions adhere to division policies and operating procedures, and remain focused on the department and division objectives and missions.
* Subject to managerial controls through conferences, review of reports, and occasional on-site visits or check-ins.
* Managerial controls are exercised on the incumbent for matters of intermediate- and long-range planning, budgetary, and human resources based matters.

**COMPLEXITY AND PROBLEM SOLVING**

*🡪 Range of issues*

* Problems are unique and unexpected.
* Challenges for problems arise due to lack of precedent.

*🡪 Course of Resolution*

* Problems require response/adaptation to changing conditions or circumstances, necessitating enterprise and new approaches with broad impacting effects.
* Problem resolution should regularly require collaboration and coordination with units internal to the division, with occasional collaboration and coordination outside the division.

*🡪 Measure of Creativity*

* Incumbents are regularly required to develop new methods/methodology for evaluation and implementation plans for new initiatives.

**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 an expert on specific subject matter evidenced by regularly researching and producing reports (e.g., white papers) on technical matters of systematic importance and consulting with managers throughout the division/University on specific issues in the position’s area of expertise.
* Actions regularly affect a departmental outcome with division-wide impact.
* Actions have a direct impact on controlling such things as project scope, team size and nature of assignments, operating budget, etc.
* Actions may have high-risk financial, compliance, political, or safety implications.
* Performance results tend to be related to efficiency, degree of waste/cost overruns, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.

**Job Template**

**GENERAL SUMMARY**

Provides strategic financial leadership to support senior leaders with operating and capital budget development and management, financial reporting and financial analysis, and provides broad-based support to managers in academic and non-academic units with a focus on University-wide financial goals and department-specific business initiatives requiring comprehensive knowledge of sound financial management practices and principles.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Works under general direction of a manager. Serves as a lead to professional and non-professional staff, as well as over specialized business and/or administrative operations.

**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.*

* Provides direct support to the Office of the Vice President & Chief Financial Officer, Office of Budget, Planning and Institutional Research or the Office of Financial Operations and Controller regarding any facet of the University’s budget and/or financial operations. Performs complex financial management activities, planning and analysis to support decision making. Provides leadership with findings of complex analysis in a clear and concise manner while providing alternatives and offering suggestions.
* Applies advanced analytical skills to analyze and resolve a wide range of highly complex financial issues; mines financial data and analyzes industry benchmarks and trends through the application of best methods and financial models; makes decisions or offers recommendations based on pertinent research work and analysis.
* Consults with and provides specialized advice to senior administrators (e.g., CFO, VPs, AVPs, Deans, Directors) and financial leaders (e.g., financial managers) throughout the University to structure, develop and manage their respective division budgets. Provides direction and guidance to other staff for all matters relating to daily and long-term budget development and financial planning activities.
* Produces and communicates comprehensive financial information, analyses, statements summaries and organized reports on the current and projected future financial status of units. Evaluates data and uses clear and precise language in the preparation of written reports of findings to quantify and illustrate complex comparisons, impact studies, sophisticated financial models or convey decisions. May conduct legal research with evidence-based findings to prepare memoranda for issuance to supervisor.
* Identifies trends affecting finances, budget needs and forecasts; reviews information and submittals for completeness and conformance with regulations and policies. Collaborates with financial managers and others to ensure that proposed adjustments are made in accordance with program objectives, changes and requirements.
* Oversees the work of and supervises assigned staff responsible for providing financial and budgetary support and special projects associated with the Office of the Vice President & Chief Financial Officer or the Office of Budget and Planning; provides direction, guidance, and support to other University employees; represents the unit and leads projects and associated resources.
* Serves as a primary resource and works collaboratively with internal units, cross functional departments and teams; acts as a University liaison and coordinates with external units, vendors and other government offices. May act on behalf of and serve as supervisor’s designee, as authorized.
* Performs cost-benefit analyses to compare programs, achieve optimal performance and profitability, review financial requests, explore alternative financing methods, or improve efficiencies.
* Researches, compiles, and analyzes accounting and other data to determine the financial resources required to implement program, meet objectives and/or effectively achieve financial results; creates regular and ad hoc reports and presents financial information to assist senior administrators, financial managers and state agencies meet their business needs and ensure compliance with policies and procedures.
* Improves overall University financial analytical capabilities and reporting; creates, implements, and distributes financial management tools for reporting, analysis, and modeling; develops financial models.
* Performs related duties as required.

**MINIMUM QUALIFICATIONS**

* Bachelor’s degree in finance, accounting, business, or related discipline.
* 8 years related accounting/financial experience. One year serving as a senior team member regularly performing the most advanced tasks of the work unit and other team members.

OR

* Master’s degree in finance, accounting, business, or related discipline or CPA.
* 6 years related accounting/financial 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, accounting and financial management practices and principles
* Policies and procedures governing the operation of the University
* Microsoft Office and related software applications

**Skill in:**

* Budget development, financial planning and analysis, and reporting
* Developing business models to achieve optimal operating performance and profitability.
* Developing and maintaining effective working relationships with all levels of management and University constituents
* Critical thinking, problem solving and business 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
* Resolve highly complex financial problems that have financial implications.
* 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
* Independently analyze available information, formulate questions, draw conclusions, understandings and make recommendations, and present such conclusions effectively to senior management