**P5: Level Standards**

**GENERAL ROLE**

This level is accountable for serving in an advanced senior resource capacity in an area of specialization.

Incumbents:

* Serve in a subject leader and consultative capacity within an area of specialization.
* Serve in the most advanced capacity and frequently being assigned project leadership roles within a specific administrative/programmatic function or specialty area.

**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 office/departmental policy and procedures.

*🡪 Job Controls*

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

**COMPLEXITY AND PROBLEM SOLVING**

*🡪 Range of issues*

* Issues tend to be operational in nature.

*🡪 Course of Resolution*

* Identifies issues and gathers facts.
* Must understand the smallest details of an assigned area.

*🡪 Measure of Creativity*

* Problems are not amenable to strict technical resolution, requiring innovative thinking for resolution.

**COMMUNICATION EXPECTATIONS**

*🡪 Manner of Delivery and Content*

* Diplomatically and effectively deliver information difficult to understand or in contrast with a student or customer's views.

**SCOPE AND MEASURABLE EFFECT**

* Actions regularly affect a department or a project outcome with department/office impact.
* Actions generally have a direct impact on controlling such things as staff size and nature of work and scope of services.
* Performance results tend to relate to efficiency, fiscal practices and standing, quality/continuous improvement, timeliness, resource allocation/effectiveness, etc.

**Job Template**

**GENERAL SUMMARY**

Monitors and prepares a department’s budget and/or assists in the University’s annual budget through establishing and applying budget controls, as well as generating and analyzing financial data for decision-making and planning.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Works under limited supervision of a supervisor or manager.

**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 guidance for assigned departmental financial management activities.
* Provides budget data for use in developing budget requests; responsible for ensuring the integrity and accuracy of data used.
* Assists with annual budget preparation process for assigned unit.
* Prepares special reports and financial data for use in analyzing policy and budget options and other administrative decision-making, often requiring the manipulation and understanding of various databases.
* Assists financial managers and decision makers in planning and evaluation efforts and identifies opportunities for reducing costs and improving performance.
* Determines impact of various budget options, utilizing large data sets.
* Reviews budget procedures for efficiency and effectiveness and recommends changes to supervisor.
* Serves as a resource to staff and others regarding routine policies and procedures.
* Performs related work as required.

**MINIMUM QUALIFICATIONS**

* Bachelor’s degree in related field.
* Five years of related experience. Two years serving in as an advanced/senior team member or working as a project lead.

**COMPETENCIES**

**Knowledge of:**

* Budgeting principles and practices
* Policies and procedures governing the operation of the department
* 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
* Resolve problems efficiently and effectively
* Effectively translate financial and analytical concepts to a wide variety of audiences
* Maintain the confidentiality of information and professional boundaries
* Work under general direction to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management