**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. Incumbents’ actions have a direct impact on controlling such things as project scope, team size and nature of assignments, operating budget, etc.
* Incumbents’ 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**

Manages aspects of a functional area of the Accounting Office such as financial reporting/general accounting, project accounting, or inventory control/capitalization. Oversees the production of University financial reports including annual and interim financial statements, ensuring compliance with policies, procedures, regulations, and statutes.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Works under direction of a manager. Serves as a lead to professional and non-professional staff, as well as over business and/or administrative operations of a moderate sized department of cross-disciplinary services.

**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.*

* Oversees the activities of the Accounting Office to ensure compliance with sound accounting standards and applicable policies, regulations, and laws.
* Leads assigned personnel by assigning and reviewing work and providing guidance.
* Acts as the point of contact for state, federal, internal, and external auditors to provide information, answer inquiries, provide documentation, and resolve audit issues.
* Participates in developing the priorities, departmental policies, procedures, and financial planning as part of the leadership team.
* Assists in the development, coordination, and monitoring of University financial reports and funds. Resolves University wide financial issues.
* Serves as the resource to accounting staff, university departments, and others in interpreting all applicable accounting policies, procedures, federal regulations, and state statutes.
* Identifies and provides resolutions to technical accounting and financial issues. Prepares or supervises the preparation of comprehensive reports and analyses for decision-making or to advise University offices, as needed.
* Serves as a member of departmental, divisional, and University committees. Represents the unit on cross-departmental projects including major software implementations.
* Performs related work as required.

**MINIMUM QUALIFICATIONS**

* Master’s degree in accounting.

OR

* Certified Public Accountant (CPA).
* Seven years of related experience.

OR

* Bachelor’s degree in accounting.
* Ten or more years of related experience.

**COMPETENCIES**

**Knowledge of:**

* Generally accepted accounting principles and financial management
* Principles and practices of employee supervision
* Accounting for higher education
* Federal and state accounting regulations
* Financial reporting, general ledger, and report writing
* Microsoft Office and related software applications

**Skill in:**

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

**Ability to:**

* Develop accounting policies and procedures, develop priorities within established guidelines, and manage and evaluate accounting projects
* Communicate effectively through both oral and written means
* Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
* Prepare comprehensive reports
* Analyze, compare, and interpret figures and financial data
* 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