

Job Template: Finance Manager 1

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Leadership
Job Title	Finance Manager 1
Job Category: M	Job Level: 5
FLSA Status: E	Job Code B24000

M5: Level Standards

GENERAL ROLE

This level is the first with the primary function of managing employees. Incumbents may initiate and communicate a variety of staffing actions.

Oversees the day-to-day operations of a group of employees. Responsible for training and development of subordinate staff, estimating staffing needs, assigning work, meeting completion dates, and interpreting and ensuring consistent application of organizational policies. Positions at this level do not exclusively serve as the supervisory level to only student employees.

Incumbents:

- Alter the order in which work or a procedure is performed.
- Recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure.
- Distribute work and monitor workload among staff.

INDEPENDENCE AND DECISION-MAKING

→ *Supervision Received*

- 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, including the oversight of staff.
- Has the latitude to make daily operational decisions.

COMPLEXITY AND PROBLEM SOLVING

→ *Range of issues*

- Issues tend to be operational in nature.

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→ *Course of Resolution*

- Identifies issues and gathers facts.
- Understands the smallest details of an assigned area.

→ *Measure of Creativity*

- Problems can be resolved within provided guidelines.
- Problems are not amenable to strict technical resolution, requiring innovative thinking.

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

Incumbents:

- Manage a small homogenous department.
- OR
- Manage a larger process-oriented area whose members perform like activities.
 - Actions regularly affect a department or a project outcome with office/programmatic 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.

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Job Path	Financial Leadership
Job Title	Finance Manager 1
Job Category: M	Job Level: 5
FLSA Status: E	Job Code B24000

Job Template

GENERAL SUMMARY

Provides leadership, guidance, technical expertise, and formal supervision for associated financial staff.

REPORTING RELATIONSHIPS AND TEAMWORK

Works under direction of a manager. Manages the day-to-day operations and a group of employees.

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.

- Manages the work of assigned personnel, including assigning and reviewing work, providing guidance, and conducting performance evaluations.
- Maintains, evaluates, and modifies systems of financial practices and records. Ensures compliance with federal, state, and university standards.
- Assists in developing, monitoring, and updating financial and administrative policies, procedures, and controls.
- Serves as liaison with other University officials regarding fiscal matters or management practices.
- Represents the University concerning financial audits. Works closely with auditors to respond to questions or resolve issues.
- Supervises the maintenance of all financial records, budget control, and internal bookkeeping in the department.
- Assists administrators in preparing annual budget and makes recommendations regarding commitment of Division or University resources for sponsored programs.
- Applies changes in legislation and/or University policy to existing and future purchasing agreements.
- Performs related work as required.

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Job Category: M	Job Level: 5
FLSA Status: E	Job Code B24000

MINIMUM QUALIFICATIONS

- Bachelor's degree in related field.
- Six to seven years of related experience.

COMPETENCIES

Knowledge of:

- Generally accepted accounting principles
- Principles and practices of employee supervision
- Systems analysis and data processing procedures
- Purchasing agreements
- Federal and state statutes
- Microsoft Office and related software applications

Skill in:

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

Ability to:

- Produce financial reports and analyses in clear concise formats
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Resolve fiscal or regulatory problems governing grants and contracts
- Analyze business trends
- 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

Job Template: Finance Manager 2

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Leadership
Job Title	Finance Manager 2
Job Category: M	Job Level: 6
FLSA Status: E	Job Code: B24001

M6: Level Standards

GENERAL ROLE

This level is accountable for providing management of a small- to moderate-sized office or department charged with providing a variety of cross-disciplinary services. Incumbents should generally have oversight of professional and non-professional staff, as well as business and/or administrative operations. Positions at this level do not exclusively serve as the supervisory level to only student employees

Incumbents:

- Modify practices and procedures to improve efficiency and quality of services delivered by subordinate staff.
- Ensure policies and procedures are followed and functions are carried out efficiently and correctly.
- Are accountable for setting goals and objectives for staff members to achieve operational objectives and service standards.
- Distribute work and monitor workload among staff.
- Evaluate and monitor the accuracy, quality, quantity, and timeliness of services and activities.
- May develop/enhance processes and procedures to improve efficiency or effectiveness of services, as a means to fulfill departmental or office initiatives.

INDEPENDENCE AND DECISION-MAKING

→ *Supervision Received*

- 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.
- Understands the smallest details of an assigned area.

→ *Job Controls*

Job Template: Finance Manager 2

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Leadership
Job Title	Finance Manager 2
Job Category: M	Job Level: 6
FLSA Status: E	Job Code: B24001

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

SCOPE AND MEASURABLE EFFECT

- Serve as a manager of a moderate-sized department or office charged with carrying out cross-disciplinary tasks or functions
- Actions regularly affect a department or an office-centric outcome with departmental impact.
- Actions generally have a direct impact on controlling such things as staff size and nature of work and scope of services.
- Actions may have high-risk compliance 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: Finance Manager 2

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Leadership
Job Title	Finance Manager 2
Job Category: M	Job Level: 6
FLSA Status: E	Job Code: B24001

Job Template

GENERAL SUMMARY

Manages the centralized financial and administrative activities in a school/college. Serves as a resource to the school/college in interpreting financial policies and regulations, and resolves issues related to budgets and expenditures.

REPORTING RELATIONSHIPS AND TEAMWORK

Works under general direction of a manager. Manages professional and non-professional staff, as well as 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.

- Administers, manages, and supervises the activities of staff in multiple units and campuses to ensure compliance with applicable policies, regulations, and sponsor guidelines.
- Manages the day-to-day operations of assigned units by directing professional staff who are responsible for budgets, financial reports, personnel actions, and administrative duties.
- Establishes work priorities/workflow and resolves management or personnel issues. Provides training, support, and guidance for staff, and evaluates job performance.
- Assists in developing the priorities, policies, procedures, and financial planning for all departments and centers within a school/college.
- Meets with school/college leadership for the development, coordination, and monitoring of funds and to resolve complex financial issues with school/college wide impact.
- Serves as a resource to the school/college in interpreting financial policies and regulations.
- Prepares data and presentations for annual budget. Collaborates with management to forecast budget needs based on enrollment pressures.
- Identifies, oversees, researches, and provides resolution to technical and financial issues. Prepares or supervises the preparation of comprehensive reports and analyses.
- Performs related work as required.

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Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Leadership
Job Title	Finance Manager 2
Job Category: M	Job Level: 6
FLSA Status: E	Job Code: B24001

MINIMUM QUALIFICATIONS

- Master's degree in related field.
- Six to seven years of related experience.

COMPETENCIES

Knowledge of:

- University policies and procedures
- Budget preparation and analysis
- Principles and practices of employee supervision
- Generally accepted accounting principles
- Systems analysis and data processing procedures
- Purchasing agreements
- Federal and state statutes
- Microsoft Office and related software applications

Skill in:

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

Ability to:

- Produce financial reports and analyses in clear concise formats
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Resolve fiscal or regulatory problems governing grants and contracts
- Analyze business trends
- 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

Job Template: Associate Finance Director

Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Leadership
Job Title	Associate Finance Director
Job Category: M	Job Level: 8
FLSA Status: E	Job Code: B24002

M8: Level Standards

GENERAL ROLE

This level is accountable for managing multiple offices, to include supervisors, their subordinate staff and the services central to their department.

Incumbents:

- Determine how to achieve the directives set by the department's strategy and division leadership.
- Establish measures and set goals as a means to fulfill the department's long-term plans.
- Develop new systems, new products/offerings, new methods or approaches, and new operating procedures to position the department for future stability and growth.

INDEPENDENCE AND DECISION-MAKING

→ *Supervision Received*

- Works under administrative review of a management exempt leader.
- Incumbents are subject to managerial controls through occasional contacts and reviews.

→ *Context of Decisions*

- Is called upon to respond to new situations and circumstances that require sensitive and special attention.
- Exercise discretionary authority on matters of financial significance to the department.

→ *Job Controls*

- Incumbents implement departmental strategy by developing the necessary plans and actions.
- Incumbents exercise control over broad plans and policies of the organization.

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Job Category: M	Job Level: 8
FLSA Status: E	Job Code: B24002

COMPLEXITY AND PROBLEM SOLVING

→ *Range of issues*

- Regular challenges that arise have substantial implications to services and processes.

→ *Course of Resolution*

- Determine how to get the department from "here" to "there," creatively using only the mission and goals of the division as a guide.
- Fulfill objectives that are established in concert with division leadership.

→ *Measure of Creativity*

- Develop innovative solutions for difficult, complex, and systemic problems that may have precedent-setting implications for the division.

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

- Actions regularly have a measurable effect on a department function of the division.
- Evaluative measures generally concern fiscal practices and standing, constituent satisfaction, student/employee experiences, productivity, etc.

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Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Leadership
Job Title	Associate Finance Director
Job Category: M	Job Level: 8
FLSA Status: E	Job Code: B24002

Job Template

GENERAL SUMMARY

Manages the centralized financial and administrative activities of a multi-department, multi-campus college/school/administrative unit of large size and fiscal complexity, with supervision of a moderate to large number of staff.

REPORTING RELATIONSHIPS AND TEAMWORK

Works under administrative review of a director or a senior leader. Manages an office of notable size, complexity, and significance.

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.

- Administers, manages, and supervises the activities of staff to ensure compliance with applicable policies, regulations, and sponsor guidelines, and is responsible for the resolution of complex financial and human resource (HR) issues, problems, and analyses.
- Manages the day-to-day operations of assigned units by directing professional staff who are responsible for budgets, financial reports, HR actions and administrative duties; establishes work priorities/workflow and resolves management or personnel issues. Provides training, support, and guidance for staff, and evaluates job performance.
- Oversees staff involved with all phases of financial analysis, budgeting, and including the preparation of quarterly/monthly financial performance measures regarding revenue and expenditures for multiple fund sources including sponsored programs. Ensures correct and timely financial and HR transactions are carried out by assigned units.
- Assists in developing the priorities, policies, procedures, and financial planning for departments and centers within a school/college/administrative unit; meets regularly with leadership for the development, coordination, and monitoring of funds and to resolve complex financial issues.
- Serves as a resource in interpreting financial policies and regulations; meets with other University departments to resolve issues related to budgets and expenditures.
- Assists departments with annual staffing plans; identifies any financial concerns and resolves them when possible.

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Occupational Group	Administrative Services
Job Family	Financial, Accounting, Budget
Job Path	Financial Leadership
Job Title	Associate Finance Director
Job Category: M	Job Level: 8
FLSA Status: E	Job Code: B24002

- Prepares data and presentations for annual budget, works with multiple departments, centers and campuses to ensure a balanced budget; collaborates closely with management to forecast budget needs.
- Identifies, oversees, researches, and provides resolution to technical and financial issues. Prepares or supervises the preparation of comprehensive reports and analyses as needed in decision making or to advise management.
- Participates as part of the school/college/administrative management team and works to resolve unusual or sensitive problems.
- Performs related work as required.

MINIMUM QUALIFICATIONS

- Master's degree in related field.
- Eight years of related experience. Two years of experience must be serving as a manager of an office of notable size, complexity and significance.

OR

- Bachelor's degree in related field.
- Ten years of related experience. Two years of experience must be serving as a manager of an office of notable size, complexity and significance.

COMPETENCIES

Knowledge of:

- Comprehensive knowledge of sound financial management and budgeting practices and principles
- Budget preparation and analysis
- Principles and practices of employee supervision
- Generally accepted accounting principles
- Systems analysis and data processing procedures
- Purchasing agreements
- Federal and state statutes
- Microsoft Office and related software applications

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Skill in:

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

Ability to:

- Work independently to analyze and resolve complex financial problems
- Produce financial reports and analyses in clear concise formats
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Resolve fiscal or regulatory problems governing grants and contracts
- Analyze business trends
- 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