# Job Template: Finance Manager 3

|  |  |
| --- | --- |
| **Occupational Group** |  Administrative Services |
| **Job Family** |  Financial, Accounting, Budget |
| **Job Path** |  Financial Leadership |
| **Job Title** |  Finance Manager 3 |
| **Job Category** |  M |
| **Job Level** |  7 |
| **Job Code** |  B24003 |
| **FLSA Status** |  E  |

*Please refer to the UCPEA Leveling Guide for a full explanation of requirements and expectations for each Career Paths Job Level.*

## GENERAL SUMMARY

Manages the centralized financial and administrative activities in a department or school/college of large size and moderate fiscal complexity. Oversees multiple ledger accounts, resolving issues related to budgets and expenditures. Provides guidance to management and administration regarding financial planning and policy interpretation.

## REPORTING RELATIONSHIPS AND TEAMWORK

Works under the general direction of a manager. Manages professional and non-professional staff, as well as business and/or administrative operations of a large-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.*

* Manages the day-to-day operations of assigned unit, directing professional staff who are responsible for budgets, financial reports, and/or administrative duties; establishes work priorities/workflow.
* Provides supervision, training, support, and guidance for staff, and evaluates job performance.
* Responsible for all phases of financial analysis and budgeting, including the preparation of quarterly/annual financial performance measures regarding revenue and expenditures for multiple fund sources.
* Develops financial priorities, policies, and procedures for the department or school/college.
* Meets with department or school/college 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.
* Prepares data and presentations for annual budget, collaborating 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.
* Performs related work as required.

## MINIMUM QUALIFICATIONS

* Master’s degree in related field.
* Six years of related experience.

## COMPETENCIES

### Knowledge of:

* University policies and procedures
* Sound financial management and budgeting practices, principles, 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:

* 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