Job Template: Business Operations Specialist 1

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P3: Level Standards

GENERAL ROLE

This level is accountable for directly providing service to any assigned work unit at the University. The service can focus on a single or a variety of job functions with varying degrees of independence. Positions at this level may supervise student or support employees.

Incumbents:

- Put into effect what is required by defined job duties and responsibilities following professional norms or established procedures and protocols for guidance.
- Alter the order in which work or a procedure is performed to improve efficiency and effectiveness.
- Recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure or practice.

INDEPENDENCE AND DECISION-MAKING

→ Supervision Received
  - Works under limited supervision.

→ Context of Decisions
  - Utilizes general departmental guidelines to develop resolutions outside the standard practice.

→ Job Controls
  - Possesses considerable freedom from technical and administrative oversight while the work is in progress.
  - Defines standard work tasks within departmental policies, practices, and procedures to achieve outcomes.
  - Serves as the advanced resource to whom more junior employees go to for technical guidance.
COMPLEXITY AND PROBLEM SOLVING

→ Range of issues
  - Handles a variety of work situations that are cyclical in character, with occasionally complex situations.
  - Issues are regularly varied.
  - Problems tend to be technical or programmatic in nature.

→ Course of Resolution
  - Assesses a variety of situations, and develops resolutions through choosing among options based on past practice or experience.

→ Measure of Creativity
  - Issues are solvable through deep technical know-how and imaginative workarounds.
  - Most of the obstacles, issues, or concerns encountered require considering alternative practice or policy interpretation.

COMMUNICATION EXPECTATIONS

→ Manner of Delivery and Content
  - Regularly provides information on finished materials to others.

SCOPE AND MEASURABLE EFFECT

- Actions regularly affect an individual, item, event, or incident, etc.
- Actions taken are generally done to meet reporting requirements or regulatory guidelines, or to satisfy internal checks and balances and/or existing standards.
- Incumbents have an indirect impact on a larger action or process, such as serving as a single component in an approval process, where the process is “owned” by a different work unit.
- May be designated to guide or organize the work of several employees within the unit.
**Job Template: Business Operations Specialist 1**

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**Job Template**

**GENERAL SUMMARY**
Responsible for oversight of front office operations for designated department.

**REPORTING RELATIONSHIPS AND TEAM WORK**
Works under limited supervision of a supervisor or manager.

**ESSENTIAL DUTIES & 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.*

- Assists students, staff, faculty, and others with a wide range of administrative and fiscal matters.
- Prepares basic budgets and statements of condition for each assigned cost center.
- Assists with bookkeeping and fiscal procedures for department.
- Helps prepare financial reports as appropriate to meet federal, state, university, and departmental regulations and requirements.
- Ensures compliance with established departmental administrative policies and procedures.
- Assists with the maintenance and coordination of complex filing systems, records, and mailings.
- Serves as a liaison between the department and other University offices.
- Performs related work as required.

**MINIMUM QUALIFICATIONS**
- Bachelor’s degree in related field.
- Two to three years of related experience.

**COMPETENCIES**

Knowledge of:
- Principles and practices of bookkeeping
- University policies related to administration of assigned department
**Job Template: Business Operations Specialist 1**

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- Microsoft Office and related software applications

**Skill in:**
- Planning and organization
- Leadership
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving and analysis

**Ability to:**
- Develop and maintain organizational structures and systems
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Produce financial reports
- 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: Business Operations Specialist 2

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P4: Level Standards

GENERAL ROLE

This level is accountable for directly providing service to any assigned work unit at the University. The service can focus on a single or a variety of job functions with varying degrees of independence. Positions at this level may supervise student or support employees.

Incumbents:

- Put into effect what is required by defined job duties and responsibilities following professional norms or established procedures and protocols for guidance.
- Alter the order in which work or a procedure is performed to improve efficiency and effectiveness.
- Recommend or implement modifications to practices and procedures to improve efficiency and quality, directly affecting the specific office operation or departmental procedure or practice.

INDEPENDENCE AND DECISION-MAKING

→ Supervision Received
  - Works under direction.

→ Context of Decisions
  - Decisions should involve selecting an approach from among alternatives, timing when certain tasks should be performed, determining how to best use available resources, and other similar choices.
  - Decisions require more coordination and collaboration among different sources, taking into consideration the roles and impact on work outside the immediate organization.

→ Job Controls
  - Has the latitude to make decisions on projects that they are accountable for delivering on.
  - Free to plan and carry out all phases of work assignments.
COMPLEXITY AND PROBLEM SOLVING

→ Range of issues
  • Assignments are defined as less reoccurring or cyclical tasks, and primarily consist of development or refinement of programmatic or administrative objectives.

→ Course of Resolution
  • Resolution and project completion require substantial planning and scheduling within the department in order to obtain and align resources when and where needed.

→ Measure of Creativity
  • Problems are not amenable to strict technical resolution, requiring innovative thinking.

COMMUNICATION EXPECTATIONS

→ Manner of Delivery and Content
  • Regularly provides information on finished materials to others.
  • Diplomatically and effectively deliver information difficult to understand or in contrast with a student or customer's views.

SCOPE AND MEASURABLE EFFECT

• Incumbents may supervise a small homogenous department, with proportionate responsibility to perform daily responsibilities similar to the work of subordinate staff.
• Actions typically affect an individual, item, event, or incident, etc.
• Actions taken are generally done to meet reporting requirements or regulatory guidelines, or to satisfy internal checks and balances and/or existing standards.
• Incumbents are typically designated as a lead or frequently assigned project leadership roles within a specific administrative/programmatic function or specialty area.
• Generally, have a more direct impact on a larger action or process, such as serving as an approver in a process, where the process is “owned” by a different work unit.
Job Template: Business Operations Specialist 2

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**Job Template**

**GENERAL SUMMARY**

Oversees the general business operations of a designated department through planning and organizing activities such as: budgeting; training and scheduling staff; office administration; decision-making; and policy and procedure compliance.

**REPORTING RELATIONSHIPS AND TEAM WORK**

Work under direction of a supervisor or manager. Serves a lead worker to employees who perform similar functions.

**ESSENTIAL DUTIES & 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 day-to-day department operations. Assists students, staff, faculty, and others with a wide range of administrative and fiscal matters.
- Handles contracts for departmental programs and initiatives.
- Assists in the preparation of departmental budget and management of approved budget; makes recommendations related to the appropriateness of requested expenditures; processes purchase and payment requisitions and reconciliations.
- Monitors bookkeeping and fiscal procedures for department.
- Prepares financial reports as appropriate to meet federal, state, university, and departmental regulations and requirements.
- Reviews departmental administrative policies and procedures for efficiency and effectiveness and recommends improvements; implements policies and procedures.
- Oversees the maintenance and coordination of complex filing systems, records, and mailings.
- Serves as a liaison between the department and other University offices.
- Performs related work as required.

**MINIMUM QUALIFICATIONS**

- Bachelor’s degree in related field.
- Four to five years of related experience.
Job Template: Business Operations Specialist 2

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**COMPETENCIES**

**Knowledge of:**
- Principles and practices of record- and bookkeeping
- Principles and practices of budget management and business operations
- University policies related to administration of assigned department or program
- Microsoft Office and related software applications

**Skill in:**
- Planning and organization
- Leadership
- Developing and maintaining effective and appropriate working relationships
- Critical thinking, problem solving and analysis

**Ability to:**
- Develop and maintain organizational structures and systems
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Develop and implement policy and protocol
- Produce detailed reports and analyses
- Generate fiscal reports, forecast expenses, and perform trend analysis to help plan and prioritize business operations
- 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: Business Operations Specialist 3

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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 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.
  - 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.
Job Template: Business Operations Specialist 3

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→ 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.
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**GENERAL SUMMARY**

Oversees all business operations of a designated department or program through planning and organizing activities such as: budgeting; training, supervising, and scheduling staff; office administration; decision-making; and policy and procedure development and compliance.

**REPORTING RELATIONSHIPS AND TEAM WORK**

Work under direction of a supervisor or manager. Serves a lead worker to employees who perform similar functions.

**ESSENTIAL DUTIES & 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.

- Supervises day-to-day department or program operations. Assists students, staff, faculty, and others on a wide range of administrative and fiscal matters.
- Oversees compliance and contracts for departmental programs and initiatives.
- Prepares the departmental budget; manages approved budget and makes decisions related to the appropriateness of requested expenditures; oversees purchase and payment requisitions and reconciliations.
- Implements and monitors bookkeeping and fiscal procedures for department.
- Prepares financial reports as appropriate to meet federal, state, university, and departmental regulations and requirements.
- Reviews departmental administrative policies and procedures for efficiency and effectiveness; develops and implements additional policies, procedures, and improvements.
- Devises, modifies, and/or supervises the maintenance and coordination of complex filing systems, records, and mailings.
- Serves as a liaison between the department and other University offices and represents the department/unit to other University and external offices and agencies.
- Performs related work as required.
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**MINIMUM QUALIFICATIONS**

- Bachelor’s degree in related field.
- Four to five years of related experience.

**COMPETENCIES**

**Knowledge of:**

- Principles and practices of employee supervision
- Principles and practices of record- and bookkeeping
- Principles and practices of budget management and business operations
- University policies related to administration of assigned department
- Microsoft Office and related software applications

**Skill in:**

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

**Ability to:**

- Develop and maintain organizational structures and systems
- Communicate effectively through both oral and written means
- Respect diversity and work collaboratively with individuals of diverse cultural, social and educational backgrounds
- Develop and implement policy and protocol
- Produce detailed reports and analyses
- Generate fiscal reports, forecast expenses, and perform trend analysis to help plan and prioritize business operations
- 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