**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 Receive*d

* 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**

**GENERAL SUMMARY**

Assists with the control and allocation of departmental and/or University budgets through the utilization and maintenance of databases and applying budget controls.

**REPORTING RELATIONSHIPS AND TEAMWORK**

Works under general 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 technical analysis to determine present and future financial performance.
* Organizes information from a variety of sources for use in analyzing future plans and forecasts.
* Analyzes and synthesizes information and designs and creates accurate and timely reports.
* Extracts, consolidates, and maintains data from multiple sources.
* Provides guidance for assigned departmental financial management activities.
* Reviews financial transactions for appropriateness and accuracy.
* Assists in preparing documents, providing analysis, and properly executing the annual budget process for assigned unit.
* Aggregate information from a variety of sources for use in analyzing financial plans and forecasts for the operating and capital budgets.
* Serves as a resource to fiscal staff and others regarding routine policies and procedures.
* Performs related work as required.

**MINIMUM QUALIFICATIONS**

* Bachelor’s degree in related field.
* Four years of related experience.

**COMPETENCIES**

**Knowledge of:**

* Basic 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
* Maintain the confidentiality of information and professional boundaries
* Work under general supervision to analyze available information, draw conclusions and understandings, and present such conclusions effectively to senior management