**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 Receive*d

* 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.

*🡪 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.

**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.

**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