

I. DESCRIPTION OF WORK

Positions in this banded class administer and manage the business and financial affairs of a department, unit, or organization. Responsibilities include facilitation and management of financial resources that may be state appropriated, contracts and grants, and/or receipt generated. Positions in this class perform a range of financial and business related duties associated with specialized areas such as accounting, budgeting, auditing, and/or grants administration. Functions assigned to the business officer role may include financial management, personnel administration/management, payroll, purchasing, inventory control, facilities coordination/planning, information technology assessment/planning, and closely related work. Positions may perform or have oversight of accounts reconciliation, maintenance and reporting of financial data, financial projections, cash/receipts management, personnel planning, and facilities management. Most positions in this class have responsibility for accounting/business standards and practices, policy interpretation/implementation, the organization of work, and the supervision of others.

II. ROLE DESCRIPTIONS BY COMPETENCY LEVEL

Contributing	Journey	Advanced
Positions at this level are business officer professionals who apply well-defined accounting, budget, and business practices to address the business needs of a department unit or organization with consistent funding sources for a limited variety of functional activities or services in a well defined business, and/or program.	Positions at this level are business officer professionals who apply a broad knowledge of accounting, budget, and business practices for a department unit or organization with dynamic funding sources and a variety of functional activities, programs, and/or services.	Positions at this level are business officer professionals who apply a comprehensive knowledge of accounting, budget, and business practices for a multifaceted department unit or organization with unique and specialized activities and/or services. Employees also oversee activities that impact and interface with other functional areas.

Note: Competency level should be based on the degree of employee involvement/responsibility for the function, as well as the size, scope, and nature of the department, unit, or organization

III. COMPETENCIES

Competency	Definition
Business Administration	Knowledge of appropriate business practices and procedures. Ability to manage and improve business processes and operations by ensuring continuity, integration of policies and procedures with the organization's mission and strategic plan. Ability to develop long- and short-term goals and objectives that support the business functions. May require knowledge of financial management, personnel administration/management, payroll, purchasing, inventory control, facilities coordination/planning, information technology assessment, and/or closely related work.
Financial Management	Ability to plan and monitor the use of expenditures to meet organizational objectives and compliance. Ability to prepare budget documents and reports. Professional knowledge and skill in business operations or accounting and financial forecasting. Ability to allocate resources, plan procurement, and oversee budgets and contracts to ensure fiscal stability of the organization.
Human Resources Management	Ability to recruit, select, develop, counsel, discipline, and evaluate performance of employees to retain a diverse workforce. Ability to administer and ensure compliance with human resources policies and procedures. Ability to observe and assess work and provide feedback. May require ability to provide technical supervision. Ability to develop the knowledge, skills, and abilities of employees and to plan for and support employees in career development opportunities. Ability to develop and implement staffing strategies as needed.
Information Analysis and Decision-Making	Ability to gather, organize, summarize and analyze data within prescribed timeframes. Ability to analyze business operations and/or financial statements. Ability to determine and ensure compliance with laws and regulations. Ability to draw conclusions. Ability to review, examine and prepare documents. Ability to choose an effective course of action or develop appropriate solutions and/or reach conclusions. Ability to take action consistent with available facts, constraints, and anticipated consequences.
Communication	Ability to communicate information to individuals or groups. Ability to deliver presentations suited to the characteristics and needs of the audience. Ability to clearly and concisely convey information orally or in writing to individuals or groups to ensure that they understand the information and the message. Ability to listen and respond appropriately to others using the appropriate media (e.g. e-mail, presentations, etc.).

Note: Not all competencies apply to every position/employee; evaluate only those that apply. Competency statements are progressive.

IV. COMPETENCY STATEMENTS BY LEVEL

Business Administration

Knowledge of appropriate business practices and procedures. Ability to manage and improve business processes and operations by ensuring continuity, integration of policies and procedures with the organization’s mission and strategic plan. Ability to develop long- and short-term goals and objectives that support the business functions. May require knowledge of financial management, personnel administration/management, payroll, purchasing, inventory control, facilities coordination/planning, information technology assessment, and/or closely related work.

Contributing	Journey	Advanced
<p>Ability to independently manage well-defined business functions for a department unit or an organization.</p> <p>Ability to apply established policies and procedures related to business practices and internal control procedures.</p> <p>Ability to implement business practices and procedures that support the strategic goals of the organization.</p>	<p>Ability to independently manage a variety of business functions with dynamic funding sources and/or a variety of functional activities, programs, and/or services</p> <p>Ability to interpret and/or modify policies and procedures to facilitate and ensure the application of sound business practices. May require the ability to integrate policies and procedures with work units external to the organization. Ability to interpret, modify, and monitor internal policies.</p> <p>Ability to participate and assist in the long- and short-term strategic goals and planning. May require the ability to participate in planning for future growth.</p>	<p>Ability to independently manage a broad range of business functions for a department unit or an organization with unique and specialized activities or services. Ability to oversee activities that impact and interface with other functional areas.</p> <p>Ability to develop and monitor internal policies and procedures to meet wide-ranging business needs, which may have broad impact. May require the ability to negotiate with external entities and constituents.</p> <p>Ability to recommend and implement long-range strategic planning, goals, and growth projections.</p>

Definitions:

Well-defined – Guidelines are clearly outlined and available.

Dynamic – Characterized by continuous change, activity, or variety. In addition to other responsibilities, the complexity of functions such as facilities management, purchasing, IT responsibilities, and receipt-supported operations add to the dynamics of an organization.

Unique/Specialized Needs – Distinctive functions which singularly define and impact business operations such as revenue generation, multiple business components, joint venture consortium, etc.

Financial Management

Ability to plan and monitor the use of expenditures to meet organizational objectives and compliance. Ability to prepare budget documents and reports. Professional knowledge and skill in business operations or accounting and financial forecasting. Ability to allocate resources, plan procurement, and oversee budgets and contracts to ensure fiscal stability of the organization.

Contributing	Journey	Advanced
<p>Ability to conduct financial management responsibilities in an organization primarily funded by consistent funding sources. General knowledge of the organization’s accounting and budget procedures.</p> <p>Ability to compile and summarize financial data to participate in budget analysis and forecasting.</p>	<p>Ability to conduct financial management responsibilities in an organization primarily funded by a variety of dynamic and multi-dimensional funding sources (e.g., multiple contracts and grants, receipts, etc.). Thorough knowledge of the applicable accounting and budgeting practices and ability to contribute to budget development and/or capital expense proposals. Ability to frequently serve as an internal resource on financial matters.</p> <p>Ability to perform budget analyses and conduct budgetary forecasting in a financial environment with varied resources.</p>	<p>Ability to conduct financial management responsibilities in a multifaceted (e.g., multiple programs, departments, etc.) organization primarily funded by a broad range of (multi-dimensional) funding sources that may include an income generation component. Comprehensive knowledge of accounting and budgeting practices and ability to submit operating budgets and prepare project/capital expense requests. Ability to provide expertise on financial matters.</p> <p>Ability to establish long-range financial objectives to meet strategic goals of a multifaceted organization. Ability to oversee a dynamic budgetary planning and forecasting process.</p>

Definitions:

Consistent Funding Sources - Funds allocated from a source in a manner that conforms to consistent guidelines and policies.

Dynamic – Characterized by continuous change, activity, or variety. In addition to other responsibilities, the complexity of functions such as facilities management, purchasing, IT responsibilities and receipt-supported operations, add to the dynamics of an organization.

Multi-faceted – Multiple programs, services, and/or departments, etc. (Example: University Dining operations include Concessions, Student Dining, Catering, All Campus Network, fast food vendors/Food Court, and management of related systems resources).

Human Resources Management

Ability to recruit, select, develop, counsel, discipline, and evaluate performance of employees to retain a diverse workforce. Ability to administer and ensure compliance with human resources policies and procedures. Ability to observe and assess work and provide feedback. May require ability to provide technical supervision. Ability to develop the knowledge, skills, and abilities of employees and to plan for and support employees in career development opportunities. Ability to develop and implement staffing strategies as needed.

Contributing	Journey	Advanced
<p>May require the ability to function in a full supervisory role that includes the recruitment, selection, and salary management of employees or may require the ability to provide assistance in human resources matters to a higher-level manager in a large and more dynamic organizational unit.</p> <p>Ability to develop and/or implement work plans. Ability to conduct performance reviews for direct reports and address performance issues. Ability to identify and recommend career development opportunities for employees.</p> <p>Ability to assess staffing needs and make recommendations. Ability to develop and set priorities for performing operational activities.</p>	<p>Ability to function in a full supervisory role for direct reports. May require the ability to serve as a resource to other supervisors in the selection process.</p> <p>Ability to develop and implement work plans. Ability to conduct performance reviews. Ability to participate in the disciplinary process, as needed. Ability to actively participate in ensuring employee growth and development. Ability to plan and deliver on-the-job training. Ability to identify and implement career progression adjustments.</p> <p>Ability to plan for staffing needs and workload distribution for multi-functional areas. May require the ability to identify funding source(s) for staffing.</p>	<p>Ability to supervise and manage professional level employees. Ability to oversee unit/organization supervisors to ensure compliance with recruitment and selection policies and procedures.</p> <p>Ability to oversee unit/organization supervisors to ensure compliance with performance management policies and procedures. Ability to recommend resolution of disciplinary matters as needed. Ability to review and authorize training opportunities and career progression adjustments for unit/organization. Ability to lead employee growth and development initiatives.</p> <p>Ability to develop strategies and lead long term staffing plan for a diverse and dynamic workforce. Ability to identify funding source(s).</p>

Information Analysis and Decision-Making

Ability to gather, organize, summarize and analyze data within prescribed timeframes. Ability to analyze business operations and/or financial statements. Ability to determine and ensure compliance with laws and regulations. Ability to draw conclusions. Ability to review, examine and prepare documents. Ability to choose an effective course of action or develop appropriate solutions and/or reach conclusions. Ability to take action consistent with available facts, constraints, and anticipated consequences.

Contributing	Journey	Advanced
<p>Ability to identify, recognize, and resolve problems that have established precedents and limited impact. Refers non-standard questions and problems to higher levels.</p> <p>Ability to gather, organize, and analyze financial information and other data. Ability to review, examine, and prepare documents.</p>	<p>Ability to assess and resolve unprecedented problems that require research and review of policy and procedures. Ability to resolve problems or compliance issues.</p> <p>Ability to analyze moderately complex business operations and financial statements. Ability to make recommendations for approval.</p>	<p>Ability to independently analyze and resolve unprecedented issues and problems that necessitate input from and collaboration of external sources. Ability to serve as a resource for others in resolving issues and problems. Ability to anticipate problems and develop resolution strategies.</p> <p>Ability to prepare and analyze complex technical matters involving existing and emerging issues pertaining to the subject area and ability to make recommendations from the analysis.</p>

Communication

Ability to communicate information to individuals or groups. Ability to deliver presentations suited to the characteristics and needs of the audience. Ability to clearly and concisely convey information orally or in writing to individuals or groups to ensure that they understand the information and the message. Ability to listen and respond appropriately to others using the appropriate media (e.g. e-mail, presentations, etc.).

Contributing	Journey	Advanced
<p>Ability to develop written documents and/or reports conveying factual information, general guidelines, and standard procedures.</p> <p>Ability to communicate factual information, general guidelines, and standard procedures.</p>	<p>Ability to develop and edit written documents and/or reports with comprehensive and interpretative information that usually spans across functional areas. Ability to provide documentation to explain and support conclusions.</p> <p>Ability to communicate comprehensive and interpretative information that spans across functional areas. Ability to respond to non-routine inquiries.</p>	<p>Ability to develop written documents and/or reports on complex matters that can be understood by both internal and external audiences. Ability to provide documentation of conclusions and recommendations that are fully supported and based on a broad knowledge of strategic goals. Ability to provide documentation and reports that have an impact on policy and/or operations.</p> <p>Ability to communicate information involving complex matters (both internal and external) to the department or organization. Ability to persuade and negotiate with others.</p>

V. MINIMUM TRAINING & EXPERIENCE

Bachelor’s degree in business administration, public administration, or related business area; or equivalent combination of training and experience. All degrees must be received from appropriately accredited institutions.

Optional Guidelines:

- Contributing: Bachelor’s degree in business administration, public administration, or related business area; or Associate’s degree and two years of administrative, business, or financial management experience.
- Journey: Bachelor’s degree in business administration, public administration, or related business area and two years of administrative management or business management experience.
- Advanced: Bachelor’s degree in business administration, public administration, or related business area and three years of administrative management or business management experience.

Note: This is a generalized representation of positions in this class and is not intended to identify essential work functions per ADA. Examples of competencies are primarily those of the majority of positions in this class, but may not be applicable to all positions.