

## I. DESCRIPTION OF WORK

Positions in this banded class manage, plan, direct, coordinate, monitor and/or supervise financial systems and/or applicable programs. They ensure that operational, procedural and regulatory requirements are met. They lead, manage and advise the development of strategic financial plans. Employees in this banded class research and analyze strategic choices and make recommendations to achieve goals and objectives of the agency. They may undertake budget-monitoring activities and ensure accountability.

## II. ROLE DESCRIPTIONS BY COMPETENCY LEVEL

Contributing	Journey	Advanced
<p>Positions at this level require considerable knowledge of principles and techniques of economic, financial and statistical analysis and the sources of economic, financial and statistical information and means of utilizing these sources. Positions at this level interpret and apply laws and regulations and analyze information, and evaluate the impact of policies/procedures and practices. Positions in this class are required to interpret and apply information relating to the applicable subject area and communicate the information clearly in both oral and written form. Positions at this level supervise the work of others. Positions at this level are required to conduct presentations and maintain strong professional relationships with the applicable industry, federal, state and local government officials.</p>	<p>Positions at this level require thorough knowledge of principles and techniques of economic, financial and statistical analysis and the sources of economic, financial and statistical information and means of utilizing these sources. Positions at this level interpret, analyze and/or evaluate compliance with applicable state and federal statutes, departmental regulatory practices and procedures, generally accepted accounting principles and systems, and rules and regulations. Positions at this level design conduct and analyze complex studies and/or interpret financial records; and develop program procedures, financial models and databases. Positions at this level supervise and resolve staffing problems and other employee relation issues. Positions at this level are required to conduct presentations and develop and maintain strong professional relationships with the applicable industry, federal, state and local government officials.</p>	<p>Positions at this level serve as subject matter experts and lead and/or manage the development of strategic financial plans. Positions at this level research and analyze strategic choices and make recommendations to achieve goals and objectives of the agency. Positions at this level evaluate and determine fiscal, operational, and service impacts; analyze and evaluate legislation; and implement and evaluate statistical models in their subject areas. Employees at this level exercise a high level of independent decision-making and serve as subject matter experts and lead work teams for more complex issues. Positions at this level are required to conduct presentations establish, develop and maintain strong professional relationships with the applicable industry, federal, state and local government officials.</p>

**III. COMPETENCIES**

<b>Competency</b>	<b>Definition</b>
<b>Knowledge - Professional</b>	Considerable knowledge of professional fiscal theory, techniques, practices and procedures. Considerable knowledge of the fiscal area of assignment and skills in applying this knowledge during a review. General knowledge of state and federal rules and regulations governing the fiscal program. General knowledge of agency/university practices, procedures and principles.
<b>Program Supervision and Administration</b>	Ability to establish expectations and clear direction to meet goals and objectives. Ability to motivate and engage employees through effective communication. Knowledge of appropriate policies and procedures for recruiting, selecting, developing, counseling, disciplining, and evaluating 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. Ability to provide feedback. Ability to provide technical supervision of staff. Ability to develop plans for employees to gain necessary knowledge, skills, and abilities to successfully perform their duties. Ability to plan for and support employees in career development opportunities. Ability to assign work and to establish work rules and acceptable levels of quality and quantity of work. Ability to review work and evaluate performance of others, and to develop individuals' competencies.
<b>Critical Thinking</b>	Ability to utilize questioning, analysis, synthesis, interpretation, inference, inductive and deductive reasoning, intuition, application and creativity. Ability to assess and interpret work. Ability to develop, evaluate, implement, and modify work. Ability to make accurate decisions.
<b>Change Management</b>	Ability to plan and implement change initiatives. Ability to support innovation and creativity by encouraging staff to accept and resolve challenges. Ability to remain flexible to meet constantly changing and sometimes opposing demands.
<b>Communication</b>	Ability to present information effectively in a manner suited to the characteristics and needs of the audience. Ability to convey information clearly and concisely either verbally or in writing to ensure that the intended audience understands the information and the message. Ability to listen and respond appropriately to others.

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

**IV. COMPETENCY STATEMENTS BY LEVEL**

**Knowledge – Professional**

Considerable knowledge of professional fiscal theory, techniques, practices and procedures. Considerable knowledge of the fiscal area of assignment and skills in applying this knowledge during a review. General knowledge of state and federal rules and regulations governing the fiscal program. General knowledge of agency/university practices, procedures and principles.

Contributing	Journey	Advanced
<p>Considerable knowledge of professional fiscal theory, techniques, practices and procedures. May require knowledge and skill in generally accepted accounting principles.</p> <p>Considerable knowledge of local, state and federal regulations and statutes governing the area of work.</p> <p>Knowledge of applicable information technology and internal controls to meet work needs.</p> <p>Basic knowledge of supervisory practices and skill in supervising others, including communication skills, how to delegate and assign duties, how to deal effectively with difficult employees, how to evaluate performance and to participate in disciplinary actions. Basic knowledge of state government’s Human Resources interview policies and procedures.</p>	<p>Full knowledge of professional fiscal theory, techniques, practices and procedures. May require knowledge and skill in generally accepted accounting principles.</p> <p>Full knowledge of local, state and federal regulations and statutes governing the area of work.</p> <p>Knowledge of applicable information technology to perform work independently. Knowledge to ensure integrity of information systems, internal controls and data, including recommending modifications as required.</p> <p>Considerable knowledge of supervisory practices and skill in supervising others, including communication skills, how to delegate and assign work, how to deal effectively with difficult employees, how to evaluate performance and may assist or conduct investigations and participate in disciplinary actions. Working knowledge of state government’s Human Resources policies and procedures.</p> <p>Basic knowledge of strategic planning methodologies and practices.</p>	<p>Extensive knowledge of professional fiscal theory, techniques, practices and procedures. May require knowledge and skill in generally accepted accounting principles.</p> <p>Extensive knowledge of local, state and federal regulations and statutes governing the area of work.</p> <p>Thorough knowledge of the reliability of systems and internal controls. Knowledge to identify problems and changing requirements.</p> <p>Extensive knowledge of supervisory practices and skill in supervising others, including communication skills, how to delegate and assign work, how to deal effectively with difficult employees, how to evaluate performance and to conduct investigations and participate in disciplinary actions. Ability to mentor new supervisors. Full knowledge of state government’s Human Resources policies and procedures.</p> <p>Considerable knowledge of strategic planning methodologies and practices.</p>

**Definitions:**

*Basic knowledge* – The span of knowledge minimally necessary to complete defined assignments.

*Full/Considerable knowledge* –The span of knowledge necessary to independently complete defined assignments to produce an effort or activity directed toward the production or accomplishment of the work objectives.

*Extensive knowledge* – The broad scope of knowledge demonstrated on the job that is beyond journey competencies.

**Program Supervision and Administration**

Ability to establish expectations and clear direction to meet goals and objectives. Ability to motivate and engage employees through effective communication. Knowledge of appropriate policies and procedures for recruiting, selecting, developing, counseling, disciplining, and evaluating 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. Ability to provide feedback. Ability to provide technical supervision of staff. Ability to develop plans for employees to gain necessary knowledge, skills, and abilities to successfully perform their duties. Ability to plan for and support employees in career development opportunities. Ability to assign work and to establish work rules and acceptable levels of quality and quantity of work. Ability to review work and evaluate performance of others, and to develop individuals' competencies.

Contributing	Journey	Advanced
<p>Ability to assess employee competencies and conduct/participate in performance management reviews. Ability to coach and mentor staff.</p> <p>Ability to plan and assign work tasks. Ability to motivate employees and develop team commitment towards meeting the operational goals and objectives.</p> <p>Ability to identify and address quality of work and performance improvement issues for the unit.</p> <p>Ability to review work and written reports to ensure compliance with standards and requirements. Ability to guide staff in providing appropriate documentation to support conclusions. Ability to conduct and prepare work and written reports.</p>	<p>Ability to coach and facilitate the enhancement of employee competencies as appropriate to the needs of the work unit.</p> <p>Ability to manage resources effectively to provide for employee training and growth, to meet the operational goals and objectives.</p> <p>Ability to address quality monitoring and performance improvement issues for the program or area of responsibility.</p> <p>Ability to review and approve work findings /written reports, often of moderate complexity.</p> <p>Ability to ensure that fiscal rules and regulations are interpreted correctly.</p>	<p>Ability to mentor, coach and manage the total competencies of staff in multiple organizational units or region. Skill in seeking sources and opportunities for employee training and growth.</p> <p>Ability to direct the management of program and staff resources. Ability to involve employees in strategic planning and implementation and in the development of policies and procedures.</p> <p>Ability to identify and address quality monitoring and performance improvement issues for fiscal services for the program or area of responsibility for multiple units or region.</p> <p>Ability to review and approve documents and reports of more complex or unique issues and effectively articulate written conclusions. Ability to ensure that fiscal rules and regulations are interpreted correctly, internal and external to the organization.</p>

**Critical Thinking**

Ability to utilize questioning, analysis, synthesis, interpretation, inference, inductive and deductive reasoning, intuition, application and creativity. Ability to assess and interpret work. Ability to develop, evaluate, implement, and modify work. Ability to make accurate decisions.

Contributing	Journey	Advanced
<p>Ability to make determinations based on facts Ability to identify problems, report potential problems, and assess options.</p> <p>Ability to interpret delivery of service and compliance with local, state and federal regulations and standards.</p> <p>Ability to identify risk impact on program policy and procedure issues.</p>	<p>Ability to analyze moderately complex situations. Ability to recommend solutions and options. Ability to alert leadership to impact on program.</p> <p>Ability to recommend response to a moderately complex situation based on interpretation of local state and federal regulations and standards.</p> <p>Ability to recommend modifications to program policy and procedures to minimize risk.</p>	<p>Ability to manage complex work situations. Ability to anticipate and remain alert to potentially problematic situations. Ability to resolve unusual problems.</p> <p>Ability to implement response to a situation based on interpretation of local state and federal regulations and standards.</p> <p>Ability to ensure implementation of program policy and procedure changes.</p>

**Change Management**

Ability to plan and implement change initiatives. Ability to support innovation and creativity by encouraging staff to accept and resolve challenges. Ability to remain flexible to meet constantly changing and sometimes opposing demands.

Contributing	Journey	Advanced
<p>Ability to understand change management strategies and principles.</p> <p>Ability to communicate and implement new policies and procedures.</p>	<p>Ability to lead a transition from old to new programs at the unit level.</p> <p>Ability to participate in the development and implementation of goals and objectives.</p>	<p>Ability to lead the development and implementation of vision and mission statements.</p> <p>Ability to lead and direct the development and implementation of goals and objectives.</p>

**Communication**

Ability to present information effectively in a manner suited to the characteristics and needs of the audience. Ability to convey information clearly and concisely either verbally or in writing to ensure that the intended audience understands the information and the message. Ability to listen and respond appropriately to others.

Contributing	Journey	Advanced
<p>Ability to communicate with individual work units or entire organization on fiscal program elements. Ability to update existing communications.</p> <p>Ability to disseminate information on changes in policies, procedures, and protocols. Ability to prepare, organize and review written reports according to documentation standards and requirements. Ability to guide staff in providing appropriate documentation to support conclusions.</p> <p>Ability to acquire basic understanding of working relationships with fiscal co-workers and others in order to achieve work goals.</p>	<p>Ability to communicate moderately complex fiscal/programmatic information outside of the organization. Ability to interpret fiscal rules and regulations internal to the organization.</p> <p>Ability to review and approve written reports, often of moderate complexity. Ability to ensure that fiscal rules and regulations are interpreted correctly. Ability to review and approve written reports of moderate complexity. Ability to ensure that fiscal rules and regulations are interpreted correctly.</p> <p>Ability to develop contacts and relationships with interested parties in achieving division/organizational goals.</p>	<p>Ability to communicate major and/or complex situations and actions, internal and external to the organization. Ability to interpret rules and regulations internal and external to the organization. Ability to serve as a technical resource in developing response to the media.</p> <p>Ability to document and report more complex or unique issues. Ability to effectively articulate written conclusions. Ability to ensure that fiscal rules and regulations are interpreted correctly, internal and external to the organization.</p> <p>Ability to develop and maintain professional working relationships in complex and/or difficult situations in order to achieve organizational goals.</p>

**V. MINIMUM TRAINING & EXPERIENCE**

Bachelor’s degree in accounting, business, finance, or other discipline related to the area of assignment with 12 credit hours of accounting coursework and three years of professional accounting experience, of which one is supervisory; or equivalent combination of training and experience. Some positions may require additional credit hours of accounting coursework. All degrees must be received from appropriately accredited institutions.

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.