### ACCOUNTING MANAGEMENT PATH

*See Handout for Path-specific CORE Foundation & Know the Institution training.*

<table>
<thead>
<tr>
<th>First stage – management</th>
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<th>Third stage – management</th>
<th>Fourth stage - management</th>
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</thead>
<tbody>
<tr>
<td><strong>TYPICAL WORK</strong></td>
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<td><strong>TYPICAL WORK</strong></td>
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<tr>
<td>Working supervisor for accounting teams performing work such as posting &amp; balancing books of account, reconciliations, cashiering, preparation of balance sheets, coding of invoices, &amp; compilation of data for preparation of regularly scheduled &amp; special accounting reports, hire, schedule, manage performance, &amp; resolve employee relations issues</td>
<td>Manage an accounting department or function; develop &amp; implement accounting policies &amp; operations of accounting systems, budgeting &amp; financial report preparation; manage the work of staff assigned to the function; provide input into budget, cost control, planning, scheduling &amp; procedural change</td>
<td>Lead the organization’s accounting function.; areas of focus include accounts receivable, general accounting, fixed asset accounting, training &amp; outreach, debt accounting, cost accounting, &amp; financial reporting; provide direction &amp; oversight to accounting staff, assist the Comptroller in the development &amp; maintenance of planning &amp; budgeting systems, the preparation of financial &amp; management reports &amp; procedures, &amp; the presentation of findings &amp; specific recommendations to senior management</td>
<td>Direct the organization’s accounting functions; specific areas normally include the analysis &amp; interpretation of trends requiring senior management's attention, the direction of preparation of complex financial &amp; management reports &amp; procedures, &amp; the presentation of findings &amp; specific recommendations to senior management</td>
</tr>
</tbody>
</table>

**WHAT:**

**EXPERIENCE & EDUCATION GUIDELINES**

1-3 yrs experience; Bachelor’s degree, although Associate’s degree & additional experience may substitute

**HOW:**

**PROFESSIONAL COMPETENCIES**

Lead others in adapting; reward employees who make useful changes; build successful team & partnerships; ask others with expertise for their perspectives on issues; lead staff through problem-solving; leverage diversity; ensure all team work product is delivered on time, within budget, & exceeding quality standards; recognize team members for demonstrating initiative; set personal agendas aside for good of the department/University; implement processes & procedures to ensure quality; develop & execute short-range (1 yr or less) plans

**WHAT: TYPICAL TECHNICAL COMPETENCIES**

Demonstrated knowledge of generally accepted accounting principles

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Demonstrated knowledge of generally accepted accounting principles
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<th>ACCOUNTING PATH</th>
<th>Finance Cluster</th>
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<tr>
<td>See Handout for Career Competencies, CORE Foundation Skills &amp; Know the Institution Skills.</td>
<td>Competencies are cumulative as Stages progress.</td>
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<tr>
<td><strong>First stage</strong></td>
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<td>Candidate can enter the Accountant field in an entry level position such as an Accounting Clerk; under direct supervision, performs entry-level bookkeeping &amp; accounting tasks; posts journal or voucher entries, reconciles accounts &amp; checks for accuracy; analyzes &amp; verifies internal consistency &amp; accuracy of documents &amp; makes adjustments</td>
<td>Entry level for degreed individuals or individuals with equivalent education &amp; experience' prepares income &amp; balance sheet statements, consolidated statements &amp; various other accounting statements &amp; reports; analyzes financial reports &amp; records, making studies or recommendations relative to the accounting of reserves, assets &amp; expenditures; reviews &amp; verifies the accuracy of journal entries &amp; accounting classifications assigned to various records; conducts special studies &amp; develops or recommends accounting methods &amp; procedures; instructs or assigns work to others engaged in general accounting activities; utilizes computer to input, retrieve or display accounting information; work is performed under supervision of a higher level accountant</td>
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<td>Approach change positively; contribute to team success by individual effort; gather information for decision-making; know when to ask for help; value others as equals; treat all fairly; deliver results; hold self accountable; go above &amp; beyond job requirements; tell the truth; commit to excellence; significant attention to detail; follow procedures; learn unit goals &amp; personal impact on their achievement</td>
<td>Work to understand &amp; execute changes; collaborate with team members to achieve team goals; explore partnership opportunities; learn from mistakes; make timely decisions; welcome opportunities to work with people from diverse backgrounds; take action without being prompted; communicate status; take immediate action when confronted with a problem; learn to apply University's values; complete work accurately, with few errors; contribute to achievement of department goals &amp; vision</td>
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<td>General familiarity with accounting practices as well as knowledge of bookkeeping/accounting principles</td>
<td>Must have demonstrated knowledge of generally accepted accounting principles; fundamental concepts, practices &amp; procedures of particular field of specialization; ability to work independently; ability to approach work with originality &amp; ingenuity is required; strong computer skills</td>
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<td>1-3 yrs experience; HS Diploma or equivalent; an understanding of basic accounting principles/practices but not requiring the skills of a fully trained accountant</td>
<td>1-5 yrs experience; Bachelor's degree or equivalent experience/education</td>
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<td>Continues to perform tasks in Second stage, although with minimal supervision; additionally, participates in University wide activities &amp; is able to think beyond how things impact just their department; often this person manages a 'task' or area without having direct reports</td>
<td>Individual has many years of experience at the University or in Higher Education; role is strategic planning in nature; serves on task forces, special projects for the comptroller &amp; coordinates cross departmental activities; no direct reports, but highly independent; makes decisions &amp; assists in the implementation of the decisions</td>
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<td>Lead others in adapting; create partnerships inside &amp; outside of the unit; effectively balance competing stakeholder interests in decision-making; leverage diversity; hold self &amp; others accountable; implement new ideas or potential solutions without prompting; foster an atmosphere of trust; disclose pertinent information openly; review work &amp; work of others to ensure quality; contribute to development of unit goals</td>
<td>Quickly modify behavior to align with change; work effectively in ambiguous situations; collaborate internally &amp; externally to create solutions to long-standing problems; consider a variety of quantitative &amp; qualitative factors in decision-making; take actions that respect diversity; follow decisions through to implementation; question current state &amp; make suggestions for improvements; act in alignment with University's values; design processes &amp; procedures to ensure quality; analyze &amp; determine relationship among complex problems &amp; issues</td>
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<td>Possesses &amp; applies comprehensive knowledge of particular field of specialization to the completion of complex assignments; ability to interpret &amp; apply organization policy, &amp; recommend changes in procedures; ability to use computers to input, retrieve or display accounting information</td>
<td>Must have demonstrated knowledge of generally accepted accounting principles &amp; have good written &amp; verbal communication skills</td>
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<td>7-10 yrs experience, including 5-8 yrs of professional experience; Bachelor's degree</td>
<td>Greater than 10 yrs experience; Bachelor's degree; should be working on or have attained Master's degree and/or CPA</td>
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# Accounts Payable Management Path

**Finance Cluster**

Competencies are cumulative as Stages progress.

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<td>This is the entry point for management of Accounts Payable; has knowledge of all four Professional stages of the Accounts Payable career cluster; teaches, writes &amp; influences University &amp; State policy; conducts training on electronic commerce, p-card, travel, IRS regulations; is the hiring official for the Accounts Payable Division within Procurement Services; evaluates the performance of Accounts Payable employees &amp; organization; addresses employee issues &amp; rewards the exceeding performer; reports results &amp; performance to the Director.</td>
<td>Determines the strategic direction of the AP organization. Develops goals &amp; performance metrics; reports the results to senior management; acts as a functional analyst for Accounts Payable specific IT projects &amp; represents AP requirements in such projects; publishes articles in AP related professional journals or teaches at national conferences.</td>
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**HOW: PROFESSIONAL COMPETENCIES**

Lead others in adapting; reward employees who make useful changes; build successful team & partnerships; ask others with expertise for their perspectives on issues; lead staff through problem-solving; leverage diversity; ensure all team work product is delivered on time, within budget, & exceeding quality standards; recognize team members for demonstrating initiative; set personal agendas aside for good of the department/University; implement processes & procedures to ensure quality; develop & execute short-range (1 yr or less) plans.

**WHAT: TYPICAL TECHNICAL COMPETENCIES**

Advanced understanding of accounting principles, & spreadsheet software; math, computer or related business skills; basic business office knowledge & skills; knowledge of University Fund Accounting, & auditing principles; knowledge of risk management & insurance, contract, federal & state laws & regulations, fund accounting, accounts payables, exchange rates, finance, export controls, diversity & electronic commerce; strong writing, teaching & payables industry knowledge.

**EXPERIENCE & EDUCATION GUIDELINES**

10+ yrs experience with 5+ yrs of accounting experience; an Associate’s or Bachelor’s degree or CPA or IAPP certification; gains IAPP certification if not held.

**Experience & Education Guidelines**

[Not Specified]

[Not Specified]
### Accounts Payable Path

See Handout for Career Competencies, CORE Foundation Skills & Know the Institution Skills.

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<td><strong>TYPICAL WORK</strong>&lt;br&gt;Performs entry level accounts payable tasks</td>
<td><strong>TYPICAL WORK</strong>&lt;br&gt;Applies University policies, procedures &amp; restrictions; gains knowledge of the University &amp; its varied &amp; complex processes; perform tasks in the following areas: internal controls, reconciliation, controlling cash, checks &amp; credit cards</td>
<td><strong>TYPICAL WORK</strong>&lt;br&gt;This is the typical entry point to a Central Administration Accounts Payable position within the Department of Procurement Services; employee demonstrates &amp; is able to apply &amp; enforce University policies &amp; procedures; becomes knowledgeable of auditing procedures; demonstrates a broad &amp; advanced knowledge of University &amp; State policies, procedures &amp; laws; understands the Federal &amp; Internal Revenue Services regulations impacting the purchase &amp; payment of goods &amp; services</td>
<td><strong>TYPICAL WORK</strong>&lt;br&gt;Has performed or possesses knowledge in all of the specialty areas within Accounts Payable; understands &amp; writes University policy; is able to assist departments &amp; vendors with complex payables issue; represents Procurement Services as a subject matter expert at internal &amp; external meetings; provides training to employees, departments &amp; vendors; develops training materials for all customers &amp; employees</td>
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### HOW: Professional Competencies

**Approach change positively:** contribute to team success by individual effort; gather information for decision-making; know when to ask for help; value others as equals; treat all fairly; deliver results; hold self accountable; go above & beyond job requirements; tell the truth; commit to excellence; significant attention to detail; follow procedures; learn unit goals & personal impact on their achievement

**Work to understand & execute changes:** collaborate with team members to achieve team goals; explore partnership opportunities; learn from mistakes; make timely decisions; welcome opportunities to work with people from diverse backgrounds; take action without being prompted; communicate status; take immediate action when confronted with a problem; learn to apply University’s values; complete work accurately, with few errors; contribute to achievement of departmental goals & vision

**Lead others in adapting:** create partnerships inside & outside of the unit; effectively balance competing stakeholder interests in decision-making; leverage diversity; hold self & others accountable; implement new ideas or potential solutions without prompting; foster an atmosphere of trust; disclose pertinent information openly; review work & work of others to ensure quality; contribute to development of unit goals

**Quickly modify behavior to align with change:** work effectively in ambiguous situations; collaborate internally & externally to create solutions to long-standing problems; consider a variety of quantitative & qualitative factors in decision-making; take actions that respect diversity; follow decisions through to implementation; question current state & make suggestions for improvements; act in alignment with University’s values; design processes & procedures to ensure quality; analyze & determine relationship among complex problems & issues

### WHAT: Typical Technical Competencies

**Accounting, math, computer or related business skills, basic business office knowledge & skills; knowledgeable of software used to create spreadsheets.** Possesses good written & verbal communications skills

**Technical skills from previous stage:** knowledge of University Fund Accounting, & general accounting principles including internal controls, reconciliation, controlling cash, checks & credit cards; strong spreadsheet/computer skills, auditing & reconciliation; knows the difference between the different fund types & expenditure types

**Technical skills from previous stage:** knowledge of risk management & insurance, contract, federal & state laws & regulations, fund accounting, accounts payables, exchange rates, finance, export controls, diversity & electronic commerce advanced understanding of accounting principles & spreadsheet software; demonstrates programmatic leadership & ability to conduct training

**Technical skills from previous stage:** demonstrates leadership & ability to conduct training; skill in electronic commerce, p-card, travel, IRS regulations; strong writing, teaching & payables industry knowledge

### Experience & Education Guidelines

**Up to 1 yr experience:** HS diploma or equivalent<br>Has performed or possesses knowledge in all of the specialty areas within Accounts Payable; understands & writes University policy; is able to assist departments & vendors with complex payables issue; represents Procurement Services as a subject matter expert at internal & external meetings; provides training to employees, departments & vendors; develops training materials for all customers & employees

**1-3 yrs experience:** HS diploma or equivalent; coursework in university procurement/payables systems, internal controls, reconciliation, controlling cash, checks & credit cards; strong spreadsheet/computer skills, auditing & reconciliation; knows the difference between the different fund types & expenditure types<br>Attends Intermediate Fund Accounting training classes offered by the University or through other organizations

**3-5 yrs experience:** HS diploma or equivalent; an Associate’s degree or training in general accounting principles or specialized area of AP or customer service<br>Performs entry level accounts payable tasks<br>Participates in the day-to-day operations of Accounts Payable responsibility; attends Intermediate Fund Accounting training classes offered by the University or through other organizations

**5-10 yrs experience:** HS diploma or equivalent; an Associate’s or Bachelors degree or training in specialty areas of AP including training & the previous stages training
**Finance Cluster**

### BUDGET MANAGEMENT PATH

*See Handout for Path-specific CORE Foundation & Know the Institution training.*

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<tr>
<td>[Not Specified]</td>
<td>Manage the Budget office staff, reviewing work products covering the University Budget for both Capital &amp; Administrative areas; liaison with other School-level individuals in monitoring capital projects &amp; operating budgets</td>
<td>Lead the Budget office for the University; provide direction, oversight &amp; performance monitoring for Budget office staff; reports directly to a VP/senior management; has overall responsibility for presenting to Board of Visitors (BoV) on various financial &amp; budget information, how it could impact UVA &amp; presenting options for the BoV to consider</td>
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<td>Prepare team for change; address change resistance; continually direct focus to what is best for the University; monitor partnerships for effectiveness; lead teams in generating innovative solutions to problems; lead team initiatives that champion diversity; lead team in working in situations where there are competing deadlines, resources, &amp; requirements; build teams where staff is capable of taking independent action; is an effective steward of the University’s resources; design &amp; monitor quality assurance processes; take action to correct quality problems; develop &amp; implement strategy; adjust strategies as environment shifts</td>
<td>Equip the management team to execute change; build teams capable of collaborating &amp; partnering; understand &amp; train staff in risk-reward trade-offs; reinforce commitment of entire team to diversity &amp; equity; develop &amp; use practical processes for monitoring goal achievement; reward initiative &amp; calculated risk-taking; a trusted, authentic leader; analyze quality assurance results for process improvement opportunities; lead strategically, based on an informed view of the future; ability to act decisively &amp; intelligently on behalf of the University is critical</td>
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### WHAT: TYPICAL TECHNICAL COMPETENCIES

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<td>[Not Specified]</td>
<td>Proficiency in Excel spreadsheets, Oracle/Discoverer</td>
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### EXPERIENCE & EDUCATION GUIDELINES*

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<td>Greater than 10 yrs experience; Master’s degree; Bachelor’s degree &amp; significant, directly-related experience can be substituted for Master’s</td>
<td>Greater than 10 yrs experience; Master’s degree</td>
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### BUDGET PATH

See Handout for Career Competencies, CORE Foundation Skills & Know the Institution Skills.

**Finance Cluster**

Competencies are cumulative as Stages progress.

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<th>How: Professional Competencies</th>
<th>What: Typical Technical Competencies</th>
<th>Experience &amp; Education Guidelines</th>
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<td>Second stage</td>
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<td>The individual in this entry level position should have relevant work-related experience; advancing into this position from another department or from within Finance is possible; this position is responsible for assigned areas of budget analysis including monitoring budgets to actuals in departments/schools &amp; reporting variances</td>
<td>Work to understand &amp; execute changes; collaborate with team members to achieve team goals; explore partnership opportunities; learn from mistakes; make timely decisions; welcome opportunities to work with people from diverse backgrounds; take action without being prompted; communicate status; take immediate action when confronted with a problem; learn to apply University’s values; complete work accurately, with few errors; contribute to achievement of department goals &amp; vision</td>
<td>Proficient with Excel spreadsheets, Oracle/Discoverer</td>
<td>3-5 yrs experience; related budget, accounting, or analytical experience; Bachelor’s degree; significant relevant experience may substitute for degree</td>
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<td>Third stage</td>
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<td>This position is responsible for assigned areas of budget analysis including researching large variances, providing assistance in budget formulations to Schools/Departments, &amp; reporting variances; this position is responsible for assigned areas of budget analysis including researching large variances, providing assistance in budget formulations to Schools/Departments, &amp; reporting variances; all reporting is timely, accurate, &amp; concise; assists with training &amp; development of new employees &amp; is more independent; develops funding models/business plans &amp; assists with developing materials for BOV; in this stage, the employee has the ability to collaborate (liaison) with other central &amp; State offices for solutions or improvements, produce customized system reports &amp; customized spreadsheets, &amp; is respected by peers</td>
<td>Lead others in adapting; create partnerships inside &amp; outside of the unit; effectively balance competing stakeholder interests in decision-making; leverage diversity; hold self &amp; others accountable; implement new ideas or potential solutions without prompting; foster an atmosphere of trust; disclose pertinent information openly; review work &amp; work of others to ensure quality; contribute to development of unit goals</td>
<td>Proficient with Excel spreadsheets, Oracle/Discoverer; someone in this role is expected to solve problems creatively &amp; effectively, provide sound guidance</td>
<td>3-5 yrs experience; experience in analytical setting, in financial or accounting field, or in dealing with budget development/management; Bachelor’s degree; significant relevant experience may substitute for degree</td>
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<td>This position is responsible for managing the work product of School Budget personnel in the various Schools/Departments &amp; investigating &amp; resolving discrepancies; reports variances to the Assistant Vice President for Budget &amp; Financial Planning</td>
<td>Quickly modify behavior to align with change; work effectively in ambiguous situations; collaborate internally &amp; externally to create solutions to long-standing problems; consider a variety of quantitative &amp; qualitative factors in decision-making; take actions that respect diversity; follow decisions through to implementation; question current state &amp; make suggestions for improvements; act in alignment with University’s values; design processes &amp; procedures to ensure quality; analyze &amp; determine relationship among complex problems &amp; issues</td>
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<td>Manages the financial analysis staff, with responsibility for analyzing &amp; evaluating alternate financial plans as they relate to the organization’s objectives; participates in analysis of debt versus equity decisions &amp; evaluation of proposed terms of acquisitions, divestitures, or joint ventures; may assist operating management in evaluation of business operations; responsible for hiring &amp; developing employees, &amp; identifying &amp; monitoring performance goals; manages employee relations issue; has impact on budgeting, controlling costs, planning, scheduling, &amp; procedural changes</td>
<td>Manages the function responsible for the preparation &amp; distribution of periodic financial statements for users other than those directly employed by the organization; ensures that all reports &amp; disclosures comply with applicable governmental regulations, professional standards, &amp; organizational policies; responsible for hiring &amp; developing employees, &amp; identifying &amp; monitoring performance goals; manages employee relations issues; has impact on budgeting, controlling costs, planning, scheduling, &amp; procedural changes</td>
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<tr>
<td><strong>WHAT: TYPICAL TECHNICAL COMPETENCIES</strong></td>
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<tr>
<td>Must have demonstrated knowledge of generally accepted accounting principles</td>
<td>Must have demonstrated knowledge of generally accepted accounting principles</td>
<td><strong>WHAT: TYPICAL TECHNICAL COMPETENCIES</strong></td>
<td>[Not Specified]</td>
<td></td>
</tr>
<tr>
<td><strong>EXPERIENCE &amp; EDUCATION GUIDELINES</strong></td>
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<tr>
<td>[Not Specified]</td>
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<tr>
<td><strong>EXPERIENCE &amp; EDUCATION GUIDELINES</strong></td>
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</tr>
<tr>
<td>3-5 yrs experience; Master’s degree and/or CPA or Bachelor’s degree &amp; higher education experience</td>
<td>5-7 yrs experience; Master’s degree and/or CPA or Bachelor’s degree &amp; higher education experience</td>
<td><strong>EXPERIENCE &amp; EDUCATION GUIDELINES</strong></td>
<td>[Not Specified]</td>
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</tbody>
</table>
## FINANCIAL ANALYSIS PATH

See Handout for Career Competencies, CORE Foundation Skills & Knowledge Institution Skills.

<table>
<thead>
<tr>
<th>First stage</th>
<th>Second stage</th>
<th>Third stage</th>
<th>Fourth stage</th>
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</thead>
<tbody>
<tr>
<td><strong>TYPICAL WORK</strong></td>
<td><strong>TYPICAL WORK</strong></td>
<td><strong>TYPICAL WORK</strong></td>
<td><strong>TYPICAL WORK</strong></td>
</tr>
</tbody>
</table>

Entry level position is typically a recent college graduate beginning his/her career or may be someone with demonstrated skills advancing from within the University; under supervision, perform research work & prepare analysis of such work as rate of return, depreciation, investment, working capital, & expense performance comparisons; prepare forecasts & analyze trend; using established procedures performs assigned tasks; work is routine & instructions are usually detailed.

Responsibility expands to include developing as well as analyzing more complex statistical, cost, & financial analysis; becomes knowledgeable of the University & its varied systems & processes & is responsible for preparing more complex reports & presentations. Prepares forecasts & analyzes trends in sales, finance, general business conditions & other areas; assists in the development of organization economic policies, conducts special economic studies & cooperates with other departments in the preparation of statistical studies.

Performs economic research work & prepares analyses of subjects such as rate of return, depreciation, working capital, investment, & financial & expense performance comparisons; interprets & applies organization policy; recommend changes in procedures; responsibility increases so that more complex financial & cost accounting analysis is performed & subsequent narrative analysis & reports are generated for University management & state & federal agencies; employee may confer with deans, department heads, & other university officials to develop requirements for special financial projects; works under limited supervision; is responsible for the planning & preparation of a variety of studies, surveys, & related costing & allocation projects.

Serves as senior technical analyst within a specific area of financial analysis; performs economic research work & prepares analyses of subjects such as rate of return, depreciation, working capital, investment, & financial & expense performance comparisons; complex financial & cost accounting analysis is performed & subsequent narrative analysis & reports are generated for University management & state & federal agencies; serves as mentor & provides assistance to support staff; plans, prepares, defends, & negotiates proposals using complex statistical, financial, & cost accounting analysis of financial reports & data; coordinates financial information with grant accounting, general accounting, & department administrators.

### HOW: PROFESSIONAL COMPETENCIES

#### Approach change positively; contribute to team success by individual effort; gather information for decision-making; know when to ask for help; value others as equals; treat all fairly; deliver results; hold self accountable; go above & beyond job requirements; tell the truth; commit to excellence; significant impact on their achievement

#### Work to understand & execute changes; collaborate with team members to achieve team goals; explore partnership opportunities; learn from mistakes; make timely decisions; welcome opportunities to work with people from diverse backgrounds; take action without being prompted; communicate status; take immediate action when confronted with a problem; learn to apply University’s values; complete work accurately, with few errors; contribute to achievement of department goals & vision

#### Lead others in adapting; create partnerships inside & outside of the unit; effectively balance competing stakeholder interests in decision-making; leverage diversity; hold self & others accountable; implement new ideas or potential solutions without prompting; foster an atmosphere of trust; disclose pertinent information openly; review work & work of others to ensure quality; contribute to development of unit goals

#### Quickly modify behavior to align with change; work effectively in ambiguous situations; collaborate internally & externally to create solutions to long-standing problems; consider a variety of quantitative & qualitative factors in decision-making; take actions that respect diversity; follow decisions through to implementation; question current state & make suggestions for improvements; act in alignment with University’s values; design processes & procedures to ensure quality; analyze & determine relationship among complex problems & issues

### WHAT: TYPICAL TECHNICAL COMPETENCIES

- Must have demonstrated knowledge of generally accepted accounting principles & have good written & verbal communication skills; ability to extract data, perform statistical, cost, & financial analysis & do presentations in written, tabular, or graphic form; ability to coordinate data input into various accounting & information systems & resolve problem; strong computer skills in order to create, display, & reproduce charts & graphs; knows fundamental concepts, practices & procedures of particular field of specialization.
- Knows & applies fundamental concepts, practices & procedures of particular field of specialization; ability to approach work with originality & ingenuity is required.
- Possesses & applies comprehensive knowledge of particular field of specialization to the completion of complex assignments; ability to perform more complex financial & cost accounting analysis; high level of computer skills in order to create, display & reproduce charts, graphs, & econometric models relative to the operations of the organization.
- Must have demonstrated knowledge of generally accepted accounting principles; possesses & applies a broad knowledge of principles, practices, & procedures of a particular field of specialization to the completion of difficult assignments. Strong computer skills in order to create, display & reproduce charts, graphs, & econometric models relative to the operations of the organization.

### EXPERIENCE & EDUCATION GUIDELINES

<table>
<thead>
<tr>
<th>First stage</th>
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<th>Third stage</th>
<th>Fourth stage</th>
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</thead>
<tbody>
<tr>
<td>0-2 yrs experience; Bachelor’s degree or equivalent experience/education</td>
<td>3-5 yrs experience; Bachelor’s degree; equivalent experience/education may substitute</td>
<td>5-7 yrs experience; Bachelor’s degree</td>
<td>7-10 yrs experience; Bachelor’s degree</td>
</tr>
</tbody>
</table>

**Finance Cluster**

Competencies are cumulative as Stages progress.
### FINANCIAL OPERATIONS MANAGEMENT PATH

*See Handout for Path-specific CORE Foundation & Know the Institution training.*

<table>
<thead>
<tr>
<th>First stage – management</th>
<th>Second stage – management</th>
<th>Third stage – management</th>
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<tr>
<td><strong>TYPICAL WORK</strong></td>
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<td><strong>TYPICAL WORK</strong></td>
<td><strong>TYPICAL WORK</strong></td>
</tr>
<tr>
<td>Supervises one or more fiscal technicians with account(s) oversight; directly manage department accounts, performing a variety of financial functions including purchasing, reporting &amp; reconciliation; may process payroll; processing &amp; comprehension of central office and/or department investment transactions will likely occur; administer &amp; manage multiple sources of funds for allocation &amp; use by departments/units and/or other areas; high degree of independent decision-making; regular consultation with supervisor on policy questions</td>
<td>Supervise one or more financial operations specialists; high-level school/area budget oversight &amp; budget transaction processing is likely to be the overriding financial duty at this stage; serve as a consistent point of contact for departments &amp; other central offices regarding budget &amp; other financial information, policies &amp; procedures; represent the area/school on task forces, committees, etc., in regards to financial &amp; administrative policies; consult their general administrative supervisor on these topics regularly as they have ultimate financial &amp; administrative management over the area/school; a firm grasp of how the area/school &amp; other central offices, as well as the greater University operates financially &amp; administratively will develop; final stage of the Financial Operations path &amp; further advancement will mean a career path change to a different, more specialized area of finance, or higher general administration path</td>
<td>[Not Specified]</td>
<td>[Not Specified]</td>
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</tbody>
</table>

### HOW: PROFESSIONAL COMPETENCIES

**First stage – management**

Lead others in adapting; reward employees who make useful changes; build successful team & partnerships; ask others with expertise for their perspectives on issues; lead staff through problem-solving; leverage diversity; ensure all team work product is delivered on time, within budget, & exceeding quality standards; recognize team members for demonstrating initiative; set personal agendas aside for good of the department/University; implement processes & procedures to ensure quality; develop & execute short-range (1 yr or less) plans

**Second stage – management**

Prepare team for change; address change resistance; continually direct focus to what is best for the University; monitor partnerships for effectiveness; lead teams in generating innovative solutions to problems; lead team initiatives that champion diversity; lead team in working in situations where there are competing deadlines, resources, & requirements; build teams where staff is capable of taking independent action; is an effective steward of the University’s resources; design & monitor quality assurance processes; take action to correct quality problems; develop & implement strategy; adjust strategies as environment shifts

**Third stage – management**

[Not Specified]

**Fourth stage - management**

[Not Specified]

### WHAT: TYPICAL TECHNICAL COMPETENCIES

**First stage – management**

Knowledge of purchasing, reconciliation, general ledger, budgeting, sources of funds, etc.; ability to perform financial analyses; strong customer service skills required for communications with faculty, administrators, employees, students, and/or other central offices

**Second stage – management**

A high level of independent decision-making is expected regarding budget management, oversight of central & certain department/unit financial operations, use of funds, & other policy decisions

**Third stage – management**

[Not Specified]

**Fourth stage - management**

[Not Specified]

### EXPERIENCE & EDUCATION GUIDELINES*

[Not Specified]
## FINANCIAL OPERATIONS PATH

See Handout for Career Competencies, CORE Foundation Skills & Know the Institution Skills.

### EXPERIENCE & EDUCATION GUIDELINES

- **First stage**
  - TYPICAL WORK
    - This path begins at the entry level in a department/unit or central office; fiscal duties would primarily include purchasing, reporting & account reconciliation, & possibly processing cash deposits.

- **Second stage**
  - TYPICAL WORK
    - Serves as the primary fiscal specialist in the department/unit; directly manages some or all department accounts, performing a variety of financial functions including purchasing, reporting & reconciliation; development of budgeting & general ledger transaction skills, including some investment transactions would occur; with multiple fiscal responsibilities, a greater degree of independent decision-making is expected & operating under little supervision is the norm; a general administrative supervisor or department chair usually supervises the individual at this stage; greater exposure to the administrative/academic processes of the department/unit; at this stage, depending on the department/unit structure, the individual could choose to make a career path change to general administration, if available; if continuing on this path, he/she would leave the department/unit level and/or assume a higher financial operations role in a central office.

- **Third stage**
  - TYPICAL WORK
    - Performs with a certain level of financial expertise in terms of purchasing, reconciliation, general ledger, budgeting, sources of funds, etc.; some degree of payroll responsibility (viewer/adjustments) may be given at this stage; processing of central office and/or department investment transactions will likely occur; fiscal duties performed in stage 2 would continue regarding central office fiscal operations; performs financial analysis; the individual may serve as the primary fiscal specialist for other units in their area in their area and/or as the fiscal backup during periods of turnover in those units; individual will administer & manage multiple sources of funds for allocation & use by departments/units and/or other areas; regularly consults with his/her supervisor on policies & procedures; employees at this stage may be asked to represent the central office on committees, task forces, etc., regarding financial & certain administrative policies.

- **Fourth stage**
  - TYPICAL WORK
    - Perform a variety of financial functions including purchasing, reporting & reconciliation; serves as the local subject matter expert in all financial processes; process payroll; processing & comprehension of central office and/or department investment transactions; administer & manage multiple sources of funds for allocation & use by departments/units and/or other areas; high degree of independent decision-making; consultation with supervisor on policy questions.

### HOW: PROFESSIONAL COMPETENCIES

- **First stage**
  - Approach change positively; contribute to team success by individual effort; gather information for decision-making; know when to ask for help; value others as equals; treat all fairly; deliver results; hold self accountable; go above & beyond job requirements; tell the truth; commit to excellence; significant attention to detail; follow procedures; learn unit goals & personal impact on their achievement.

- **Second stage**
  - Work to understand & execute changes; collaborate with team members to achieve team goals; explore partnership opportunities; learn from mistakes; make timely decisions; welcome opportunities to work with people from diverse backgrounds; take action without being prompted; communicate status; take immediate action when confronted with a problem; learn to apply University’s values; complete work accurately, with few errors; contribute to achievement of department goals & vision.

- **Third stage**
  - Lead others in adapting; create partnerships inside & outside of the unit; effectively balance competing stakeholder interests in decision-making; leverage diversity; hold self & others accountable; implement new ideas or potential solutions without prompting; foster an atmosphere of trust; disclose pertinent information openly; review work & work of others to ensure quality; contribute to development of unit goals.

- **Fourth stage**
  - Quickly modify behavior to align with change; work effectively in ambiguous situations; collaborate internally & externally to create solutions to long-standing problems; consider a variety of quantitative & qualitative factors in decision-making; take actions that respect diversity; follow decisions through to implementation; question current state & make suggestions for improvements; act in alignment with University’s values; design processes & procedures to ensure quality; analyze & determine relationship among complex problems & issues.

### WHAT: TYPICAL TECHNICAL COMPETENCIES

- **First stage**
  - Ability to gain knowledge of purchasing & account reconciliation policies & procedures, & other financial concepts such as budgeting, payroll, & general ledger processes; sound independent decision-making skills should also exist in order to progress to the next stage.

- **Second stage**
  - Knowledge of financial policies, procedures & responsibilities; strong customer service skills required for communications with faculty, administrators, employees, students, and/or other central offices; knowledge of department/unit payroll functions & understanding of financial analysis (P&A).

- **Third stage**
  - Ability to perform financial analysis; customer service skills in order to provide service to departments/units & other central office contacts with questions in any one of the financial specialty areas; a high degree of independent decision-making is expected, with little supervision from the Financial Operations Director; familiarity with University administrative/academic policies.

- **Fourth stage**
  - Knowledge of purchasing, reconciliation, general ledger, budgeting, sources of funds, etc; ability to perform financial analyses; strong customer service skills required for communications with faculty, administrators, employees, students, and/or other central offices.

### EXPERIENCE & EDUCATION GUIDELINES

- **First stage**
  - [Not Specified]

- **Second stage**
  - [Not Specified]

- **Third stage**
  - Employees at this stage should be working on attainment of undergraduate degree, if they do not possess one.

- **Fourth stage**
  - Employees at this stage should be working on attainment of undergraduate degree, if they do not possess one.
### First stage – management

**TYPICAL WORK**
Supervise & perform payroll functions such as data entry, reporting & reconciliation; establish team & individual performance goals & hold staff accountable for work products; employee is expected to be very accessible; analyze reports & contribute to payroll department planning; may back up the Records Manager.

### Second stage – management

**TYPICAL WORK**
In charge of analyzing, planning, & directing the secure collection & storage of employee records; keep up to date on changes in laws, analyze the significance for the University, & contribute departmental input into policy making; 50% time planning.

### Third stage – management

**TYPICAL WORK**
Direct the university payroll function using employees' data analysis & departmental work plans; develop the plan for dealing with current demands & the future needs of the University; set the internal tone for a department where accuracy & strict adherence to set procedures ensures compliance with law & policy; establish the highest ethical standards for the department, & at the same time flexibility in dealing with the human needs of the employees; take a leadership role at the national level in APA; over 50% time on strategy.

### Fourth stage - management

**TYPICAL WORK**
[Not Specified]

### HOW: PROFESSIONAL COMPETENCIES

Lead others in adapting; reward employees who make useful changes; build successful team & partnerships; ask others with expertise for their perspectives on issues; lead staff through problem-solving; leverage diversity; ensure all team work product is delivered on time, within budget, & exceeding quality standards; recognize team members for demonstrating initiative; set personal agendas aside for good of the department/University; implement processes & procedures to ensure quality; develop & execute short-range (1 yr or less) plans.

### WHAT: TYPICAL TECHNICAL COMPETENCIES

Supervisory skills, strong payroll expertise; analytical skills; attention to detail.

### EXPERIENCE & EDUCATION GUIDELINES

5-7 yrs experience, 5 yrs of significant experience in payroll; Bachelor’s degree; Payroll 270 – Payroll Best Practices – an advanced APA class is required regardless of the branch taken; certification as a payroll professional, CPP; APA class 201 – Payroll Administration.

### Finance Cluster

*See Handout for Path-specific CORE Foundation & Know the Institution training.

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### First stage – management

**TYPICAL WORK**
In charge of analyzing, planning, & directing the secure collection & storage of employee records; keep up to date on changes in laws, analyze the significance for the University, & contribute departmental input into policy making; 50% time planning.

### Second stage – management

**TYPICAL WORK**
Supervise & perform payroll functions such as data entry, reporting & reconciliation; establish team & individual performance goals & hold staff accountable for work products; employee is expected to be very accessible; analyze reports & contribute to payroll department planning; may back up the Records Manager.

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### Fourth stage - management

**TYPICAL WORK**
[Not Specified]

### HOW: PROFESSIONAL COMPETENCIES

Prepare team for change; address change resistance; continually direct focus to what is best for the University; monitor partnerships for effectiveness; lead teams in generating innovative solutions to problems; lead team initiatives that champion diversity; lead team in working in situations where there are competing deadlines, resources, & requirements; build teams where staff is capable of taking independent action; is an effective steward of the University's resources; design & monitor quality assurance processes; take action to correct quality problems; develop & implement strategy; adjust strategies as environment shifts.

### WHAT: TYPICAL TECHNICAL COMPETENCIES

Extensive understanding of tax compliance issues & immigration policy.

### EXPERIENCE & EDUCATION GUIDELINES

7-10 yrs experience; Bachelor’s degree; certification as a payroll professional, CPP; APA class 201 – Payroll Administration.

### Finance Cluster

*See Handout for Path-specific CORE Foundation & Know the Institution training.

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### First stage – management

**TYPICAL WORK**
In charge of analyzing, planning, & directing the secure collection & storage of employee records; keep up to date on changes in laws, analyze the significance for the University, & contribute departmental input into policy making; 50% time planning.

### Second stage – management

**TYPICAL WORK**
Supervise & perform payroll functions such as data entry, reporting & reconciliation; establish team & individual performance goals & hold staff accountable for work products; employee is expected to be very accessible; analyze reports & contribute to payroll department planning; may back up the Records Manager.

### Third stage – management

**TYPICAL WORK**
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### Fourth stage - management

**TYPICAL WORK**
[Not Specified]

### HOW: PROFESSIONAL COMPETENCIES

Equip the management team to execute change; build teams capable of collaborating & partnering; understand & train staff in risk-reward trade-offs; reinforce commitment of entire team to diversity & equity; develop & use practical processes for monitoring goal achievement; reward initiative & calculated risk-taking; a trusted, authentic leader; analyze quality assurance results for process improvement opportunities; lead strategically, based on an informed view of the future.

### WHAT: TYPICAL TECHNICAL COMPETENCIES

Same as 2nd Stage.

### EXPERIENCE & EDUCATION GUIDELINES

Has a degree in management; CPP; – 7 yrs in University payroll.

### Finance Cluster

*See Handout for Path-specific CORE Foundation & Know the Institution training.

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### First stage – management

**TYPICAL WORK**
In charge of analyzing, planning, & directing the secure collection & storage of employee records; keep up to date on changes in laws, analyze the significance for the University, & contribute departmental input into policy making; 50% time planning.

### Second stage – management

**TYPICAL WORK**
Supervise & perform payroll functions such as data entry, reporting & reconciliation; establish team & individual performance goals & hold staff accountable for work products; employee is expected to be very accessible; analyze reports & contribute to payroll department planning; may back up the Records Manager.

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**TYPICAL WORK**
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### Fourth stage - management

**TYPICAL WORK**
[Not Specified]

### HOW: PROFESSIONAL COMPETENCIES

Prepare team for change; address change resistance; continually direct focus to what is best for the University; monitor partnerships for effectiveness; lead teams in generating innovative solutions to problems; lead team initiatives that champion diversity; lead team in working in situations where there are competing deadlines, resources, & requirements; build teams where staff is capable of taking independent action; is an effective steward of the University's resources; design & monitor quality assurance processes; take action to correct quality problems; develop & implement strategy; adjust strategies as environment shifts.

### WHAT: TYPICAL TECHNICAL COMPETENCIES

Extensive understanding of tax compliance issues & immigration policy.

### EXPERIENCE & EDUCATION GUIDELINES

7-10 yrs experience; Bachelor’s degree; certification as a payroll professional, CPP; APA class 201 – Payroll Administration.

### Finance Cluster

*See Handout for Path-specific CORE Foundation & Know the Institution training.

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### First stage – management

**TYPICAL WORK**
In charge of analyzing, planning, & directing the secure collection & storage of employee records; keep up to date on changes in laws, analyze the significance for the University, & contribute departmental input into policy making; 50% time planning.

### Second stage – management

**TYPICAL WORK**
Supervise & perform payroll functions such as data entry, reporting & reconciliation; establish team & individual performance goals & hold staff accountable for work products; employee is expected to be very accessible; analyze reports & contribute to payroll department planning; may back up the Records Manager.

### Third stage – management

**TYPICAL WORK**
Direct the university payroll function using employees' data analysis & departmental work plans; develop the plan for dealing with current demands & the future needs of the University; set the internal tone for a department where accuracy & strict adherence to set procedures ensures compliance with law & policy; establish the highest ethical standards for the department, & at the same time flexibility in dealing with the human needs of the employees; take a leadership role at the national level in APA; over 50% time on strategy.

### Fourth stage - management

**TYPICAL WORK**
[Not Specified]

### HOW: PROFESSIONAL COMPETENCIES

Equip the management team to execute change; build teams capable of collaborating & partnering; understand & train staff in risk-reward trade-offs; reinforce commitment of entire team to diversity & equity; develop & use practical processes for monitoring goal achievement; reward initiative & calculated risk-taking; a trusted, authentic leader; analyze quality assurance results for process improvement opportunities; lead strategically, based on an informed view of the future.

### WHAT: TYPICAL TECHNICAL COMPETENCIES

Same as 2nd Stage.

### EXPERIENCE & EDUCATION GUIDELINES

Has a degree in management; CPP; – 7 yrs in University payroll.

### Finance Cluster

*See Handout for Path-specific CORE Foundation & Know the Institution training.
### PAYROLL PATH

See Handout for Career Competencies, CORE Foundation Skills & Know the Institution Skills.

<table>
<thead>
<tr>
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<tr>
<td><strong>Experiences &amp; Education Guidelines</strong></td>
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</tr>
<tr>
<td>0-1 yr experience; HS diploma or equivalent; employees encouraged to attend community college classes</td>
<td>1-3 yrs experience; HS diploma or equivalent; Fundamental Payroll Certification (FPC); working toward Associate’s degree</td>
<td>3-5 yrs experience; HS diploma or equivalent; Fundamental Payroll Certification (FPC); working toward Associate's Degree &amp; Certified Payroll Professional (CPP) designation; takes college level courses to further build knowledge base</td>
<td>5-7 yrs experience; Associate's degree; employee has CPP &amp; regularly attends &amp; participates in state regional association meetings</td>
</tr>
<tr>
<td><strong>Finance Cluster</strong> Competencies are cumulative as Stages progress.</td>
<td><strong>Finance Cluster</strong></td>
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</tr>
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<td><strong>Math skills; enjoys the detail work &amp; the tension of performance; ability to pass Fundamental Payroll Certification (FPC) exam after he/she completes the first six months of work; basic computer data entry</strong></td>
<td><strong>Same as Stage 1.</strong></td>
<td><strong>Ability to perform basic accounting transactions between Payroll &amp; GL, &amp; reconcile transactions</strong></td>
<td><strong>Analytical expertise</strong></td>
</tr>
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<td><strong>Approach change positively; contribute to team success by individual effort; gather information for decision-making; know when to ask for help; value others as equals; treat all fairly; deliver results; hold self accountable; go above &amp; beyond job requirements; tell the truth; commit to excellence; significant attention to detail; follow procedures; learn unit goals &amp; personal impact on their achievement</strong></td>
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<td><strong>Lead others in adapting; create partnerships inside &amp; outside of the unit; effectively balance competing stakeholder interests in decision-making; leverage diversity; hold self &amp; others accountable; implement new ideas or potential solutions without prompting; foster an atmosphere of trust; disclose pertinent information openly; review work &amp; work of others to ensure quality; contribute to development of unit goals</strong></td>
<td><strong>Quickly modify behavior to align with change; work effectively in ambiguous situations; collaborate internally &amp; externally to create solutions to long-standing problems; consider a variety of quantitative &amp; qualitative factors in decision-making; take actions that respect diversity; follow decisions through to implementation; question current state &amp; make suggestions for improvements; act in alignment with University’s values; design processes &amp; procedures to ensure quality; analyze &amp; determine relationship among complex problems &amp; issues</strong></td>
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<td>Quickly modify behavior to align with change; work effectively in ambiguous situations; collaborate internally &amp; externally to create solutions to long-standing problems; consider a variety of quantitative &amp; qualitative factors in decision-making; take actions that respect diversity; follow decisions through to implementation; question current state &amp; make suggestions for improvements; act in alignment with University’s values; design processes &amp; procedures to ensure quality; analyze &amp; determine relationship among complex problems &amp; issues</td>
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</table>

### First Stage

- Enters data & runs simple processes involved in payroll

### Second Stage

- At this stage, employees hold the responsibility of running a complete payroll from start to finish; run reports to verify accuracy of payroll run

### Third Stage

- Performs functions such as calculating gross pay & deductions, calculating tax & preparing tax forms, all topics specific to the field of payroll; employees at this stage don't just run processes, but understand & bring together the various components of the payroll processes & reinforce what they learn in professional development venues; run payroll processes, understand & bring together the various components of the payroll processes; perform basic accounting transactions between Payroll & General Ledger; reconcile those transactions

### Fourth Stage

- Responsible for transferring files for specialty areas, both internal & external; areas include: benefits, tax reimbursements, deductions, wage attachments & garnishments & internal files & processes involving the integrated system interfaces; this work is not simply transferring files it is also reconciling, so individual has to reconcile the accounts involved in the transfers; the employee is in the beginning stage of analysis, since reconciling involves discovering the underlying causes of discrepancies; meets deadlines with serious consequences for the University; transfers & processes involve vast sums of money, & federal & state tax requirements, as well as the benefits & liabilities of thousands of individual worker; external areas include: benefits, tax reimbursements, deductions, wage attachments & garnishments & internal files & processes involving the integrated system interfaces; as an experienced payroll professional, the employee makes presentations at state forums
## PROCUREMENT MANAGEMENT PATH

*See Handout for Path-specific CORE Foundation & Know the Institution training.*

### Finance Cluster

<table>
<thead>
<tr>
<th>First stage – management</th>
<th>Second stage – management</th>
<th>Third stage – management</th>
<th>Fourth stage – management</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>TYPICAL WORK</strong></td>
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<td></td>
</tr>
<tr>
<td>[Not Specified]</td>
<td>Manage a Procurement team; hire, assign work, manage performance, &amp; address employee concerns; establish goals metrics for organizational performance, &amp; measure &amp; report against these; help set the strategic direction for the organization</td>
<td>[Not Specified]</td>
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</tr>
<tr>
<td><strong>HOW: PROFESSIONAL COMPETENCIES</strong></td>
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<tr>
<td>[Not Specified]</td>
<td>Prepare team for change; address change resistance; continually direct focus to what is best for the University; monitor partnerships for effectiveness; lead teams in generating innovative solutions to problems; lead team initiatives that champion diversity; lead team in working in situations where there are competing deadlines, resources, &amp; requirements; build teams where staff is capable of taking independent action; is an effective steward of the University's resources; design &amp; monitor quality assurance processes; take action to correct quality problems; develop &amp; implement strategy; adjust strategies as environment shifts; negotiating skills</td>
<td>[Not Specified]</td>
<td>[Not Specified]</td>
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<tr>
<td><strong>WHAT: TYPICAL TECHNICAL COMPETENCIES</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>[Not Specified]</td>
<td>Demonstrated knowledge of generally accepted inventory, logistics, procurement, risk management, &amp; contracting practices; expert level skills in project management, contracting, diversity or electronic commerce; strong spreadsheet skills; knowledge of federal &amp; state laws regulating purchasing</td>
<td>[Not Specified]</td>
<td>[Not Specified]</td>
</tr>
<tr>
<td><strong>EXPERIENCE &amp; EDUCATION GUIDELINES</strong></td>
<td></td>
<td></td>
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<tr>
<td>[Not Specified]</td>
<td>Greater than 10 yrs experience; Bachelor’s degree</td>
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**PROCUREMENT PATH**

See Handout for Career Competencies, CORE Foundation Skills & Know the Institution Skills.

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<td>Part of GENERAL ADMINISTRATION CLUSTER GENERAL ADMINISTRATION PATH</td>
<td>Entry level into the Procurement career path</td>
<td>This is the typical entry point to a Central Administration Procurement position; uses solid negotiation skills &amp; is comfortable working without daily supervision; has dealt with multiple business areas related to the procurement function, including risk management &amp; insurance, contracts, federal &amp; state laws &amp; regulations, fund accounting, accounts payables, exchange rates, finance, export controls, diversity &amp; electronic commerce. Understands &amp; writes University policy; is able to assist departments &amp; vendors with complex procurement issues; provides training to colleagues, departments &amp; vendors; develops training materials for all customers &amp; employees</td>
<td>Is viewed by colleagues, customers &amp; vendors as a procurement expert; demonstrates leadership by representing Procurement or the University in training sessions, task forces at State or organization conferences; leads committees of high level employees &amp; consultants; is able to build consensus among complex procurement committees with varied backgrounds; manages &amp; facilitates committee meetings so that the procurement phase of major project is completed on schedule</td>
</tr>
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**HOW: PROFESSIONAL COMPETENCIES**
Approach change positively; contribute to team success by individual effort; gather information for decision-making; know when to ask for help; value others as equals; treat all fairly; deliver results; hold self accountable; go above & beyond job requirements; tell the truth; commit to excellence; significant attention to detail; follow procedures; learn unit goals & personal impact on their achievement

**WHAT: TYPICAL TECHNICAL COMPETENCIES**
Communication, inventory, logistics, legal, accounting or related business skills; good computer skills & both written & verbal communication skills

**EXPERIENCE & EDUCATION GUIDELINES**
1-3 yrs experience in areas such as purchasing, inventory, logistics, legal, accounting, retail or other business related field or an undergraduate degree; HS diploma or equivalent; preference is a 4 yr degree in a business related area of study; an Associate’s degree is acceptable at the entry point with experience

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**HOW: PROFESSIONAL COMPETENCIES**
Work to understand & execute changes; collaborate with team members to achieve team goals; explore partnership opportunities; learn from mistakes; make timely decisions; welcome opportunities to work with people from diverse backgrounds; take action without being prompted; communicate status; take immediate action when confronted with a problem; learn to apply University’s values; complete work accurately, with few errors; contribute to achievement of department goals & vision

**WHAT: TYPICAL TECHNICAL COMPETENCIES**
Communication, inventory, logistics, legal, accounting or related business skills; good computer skills & both written & verbal communication skills; procurement & negotiation skills

**EXPERIENCE & EDUCATION GUIDELINES**
3-5 yrs experience; preference is a 4 yr degree in a business related area of study; an Associate’s degree is acceptable at the entry point with experience; training in University procurement systems, Internal & external procurement

**HOW: PROFESSIONAL COMPETENCIES**
Lead others in adapting; create partnerships inside & outside of the unit; effectively balance competing stakeholder interests in decision-making; leverage diversity; hold self & others accountable; implement new ideas or potential solutions without prompting; foster an atmosphere of trust; disclose pertinent information openly; review work & work of others to ensure quality; contribute to development of unit goals

**WHAT: TYPICAL TECHNICAL COMPETENCIES**
Inventory, logistics, legal, accounting or related business skills; good computer skills, procurement & negotiation skills, strong spreadsheet/computer skills in order to evaluate & develop complex spreadsheets & compose detailed written solicitations using computer software; knowledge of risk management & insurance, contract, federal & state laws & regulations, fund accounting, accounts payables, exchange rates, finance, export controls, diversity & electronic commerce; solid understanding of procurement processes, policies, procedures, laws & regulations

**EXPERIENCE & EDUCATION GUIDELINES**
5-7 yrs experience; Bachelor’s degree

**HOW: PROFESSIONAL COMPETENCIES**
Quickly modify behavior to align with change; work effectively in ambiguous situations; collaborate internally & externally to create solutions to long-standing problems; consider a variety of quantitative & qualitative factors in decision-making; take actions that respect diversity; follow decisions through to implementation; question current state & make suggestions for improvements; act in alignment with University’s values; design processes & procedures to ensure quality; analyze & determine relationship among complex problems & issues

**WHAT: TYPICAL TECHNICAL COMPETENCIES**
All technical skills from Third stage; ability to provide programmatic leadership & ability to conduct training is comfortable interacting & negotiating with high level executives both internal & external to the University; skills in project management, contracting, diversity or electronic commerce

**EXPERIENCE & EDUCATION GUIDELINES**
7-10+ yrs experience; Bachelor’s degree; certification as a Certified Purchasing Manager by ISM or Certified Professional Contracts Manager by NCMA or other procurement related certifying organization