**Financial Services Manager 1**

**Manager 1**

**Financial Services**

**Manager 2**

**Financial Services**

**Manager 3**

**Financial Services**

**Manager 4**

**Financial Services**

**Exempt**

**Exempt**

**Exempt**

**Exempt**

**Generic Scope**

Sends the majority of time (50% or more) achieving organizational objectives through the coordinated achievements of subordinate staff. Establishes departmental goals and objectives, management of financial and physical resources, and often physical resources in compliance with departmental and organizational goals and objectives. Ensures subordinate supervisors and professionals adhere to defined internal controls. Manages systems and procedures to protect departmental assets. Manages systems and procedures to protect organizational assets. Manages systems and procedures to protect operational assets. Manages systems and procedures to protect professional assets. Manages systems and procedures to protect organizational assets.

**Custom Scope**

Receives assignments in the form of objectives and determines how to use resources to meet schedules and goals. Reviews and approves recommendations for functional programs. Provides guidance to subordinates to achieve goals in accordance with established policies. Errorneous decisions or failure to achieve goals results in additional costs and personnel, and serious delays in overall schedules. Participates with other senior managers to establish strategic plans and objectives. Makes decisions on financial services matters and ensures achievement of objectives. Responsible for managing, preparing, administering, and directing resources. Reviews and approves recommendations for functional programs. Involved in developing, modifying, and executing policies that affect immediate operation(s) and may also have organization-wide impact. Errorneous decisions or failure to achieve goals result in additional costs and personnel, and serious delays in overall schedules. Participates with other senior managers to establish strategic plans and objectives. Makes decisions on financial services matters and ensures achievement of objectives. Responsible for managing, preparing, administering, and directing resources. Reviews and approves recommendations for functional programs. Involved in developing, modifying, and executing policies that affect immediate operation(s) and may also have organization-wide impact. Errorneous decisions or failure to achieve goals result in additional costs and personnel, and serious delays in overall schedules.
<table>
<thead>
<tr>
<th>Job Family</th>
<th>Finance</th>
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</thead>
<tbody>
<tr>
<td>Job Function</td>
<td>Financial Services</td>
</tr>
<tr>
<td>Category</td>
<td>Supervisory &amp; Management</td>
</tr>
<tr>
<td>Job Summary</td>
<td>Involves the processing and servicing of a variety of operational, personnel, and financial transactions and services. Includes cashiering, payroll, accounts receivable, accounts payable, purchasing, recharge billing, travel / entertainment, gift accounting, collections, data collection and data entry, analysis, review and control, customer servicing, and reporting.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Key Resp 03</th>
<th>Has responsibility for one or more financial services sections.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Resp 04</td>
<td>Ensures the accuracy and control of financial data and reporting.</td>
</tr>
<tr>
<td>Key Resp 05</td>
<td>Develops, recommends, and implements policies and procedures for related financial management and recording.</td>
</tr>
<tr>
<td>Key Resp 06</td>
<td>Meets all government reporting requirements for related financial activities.</td>
</tr>
<tr>
<td>Key Resp 07</td>
<td>Manages, through subordinate supervisors, the coordination of activities of a department with responsibility for results in terms of costs, methods, and employees.</td>
</tr>
<tr>
<td>Key Resp 08</td>
<td>Establish, assess, and strengthen appropriate internal controls to protect University resources.</td>
</tr>
<tr>
<td>Key Resp 09</td>
<td>Advises senior management on matters concerning several functional areas, department and / or customers.</td>
</tr>
<tr>
<td>Key Resp 10</td>
<td>Directs and controls the activities of a broad organizational department through several subordinate managers having overall responsibility for functional programs.</td>
</tr>
<tr>
<td>Key Resp 11</td>
<td>Leads other senior managers to establish campus strategic plans and objectives.</td>
</tr>
<tr>
<td>Education 1</td>
<td>Bachelor's degree in related area and / or equivalent experience / training.</td>
</tr>
<tr>
<td>Education 2</td>
<td>Advanced degree preferred.</td>
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</tbody>
</table>

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<thead>
<tr>
<th>Key Resp 02</th>
<th>Costs, productivity and human resource-related activities pertaining to assigned staff members.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Resp 03</td>
<td>Makes recommendations and implements decisions on issues (operational and budget processes, staff FTE, finance, human resources and space planning) that have department-wide impact.</td>
</tr>
<tr>
<td>Key Resp 04</td>
<td>Leads efforts to design, develop and implement systems that ensure the accuracy and control of financial data and reporting.</td>
</tr>
<tr>
<td>Key Resp 05</td>
<td>Develops, recommends, and implements policies and procedures for financial management and recording.</td>
</tr>
<tr>
<td>Key Resp 06</td>
<td>Meets all government reporting requirements for related financial activities.</td>
</tr>
<tr>
<td>Key Resp 07</td>
<td>Manages the activities of financial services through several subordinate managers having overall responsibility for functional programs.</td>
</tr>
<tr>
<td>Key Resp 08</td>
<td>Plans, designs and implements organization-wide internal controls to protect University resources.</td>
</tr>
<tr>
<td>Key Resp 09</td>
<td>Advises senior management on controversial situations, customer negotiations, or influencing and persuading other senior level managers.</td>
</tr>
<tr>
<td>Key Resp 10</td>
<td>Directs and controls the activities of a broad organizational department through several subordinate managers having overall responsibility for functional programs.</td>
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| Key Resp 03 | Includes operational and budget processes, staff FTE, finance, human resources and space planning. |
| Key Resp 04 | Leads efforts to design, develop and implement systems that ensure the accuracy and control of financial data and reporting. |
| Key Resp 05 | Develops, recommends, and implements policies and procedures for financial management and recording. |
| Key Resp 06 | Meets all government reporting requirements for related financial activities. |
| Key Resp 07 | Manages the activities of financial services through several subordinate managers having overall responsibility for functional programs. |
| Key Resp 08 | Plans, designs and implements organization-wide internal controls to protect University resources. |
| Key Resp 09 | Advises senior management on controversial situations, customer negotiations, or influencing and persuading other senior level managers. |
| Key Resp 10 | Directs and controls the activities of a broad organizational department through several subordinate managers having overall responsibility for functional programs. |
| Key Resp 11 | Leads other senior managers to establish campus strategic plans and objectives. |
| Education 1 | Bachelor's degree in related area and / or equivalent experience / training. |
| Education 2 | Advanced degree preferred. |

Page 2 of 4  Last Revised: 09 March 2017
**Job Family** | Finance  
---|---  
**Job Function** | Financial Services  
**Category** | Supervisory & Management  
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**Job Summary** | Involves the processing and servicing of a variety of operational, personnel, and financial transactions and services. Includes cashiering, payroll, accounts receivable, accounts payable, purchasing, recharge billing, travel / entertainment, gift accounting, collections, data collection and data entry, analysis, review and control, customer servicing, and reporting.  
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**Education** | 4  
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**License 4** |  
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**Spec Cond 2** |  
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**KSA 01** | Broad knowledge of financial transactions and financial systems, as well as related policy, accounting, and regulatory compliance requirements.  
**KSA 02** | Knowledge and understanding of internal control practices and their impact on protecting University resources.  
**KSA 03** | Strong interpersonal skills and ability to work effectively across the organization at all levels.  
**KSA 04** | Strong skills in use of spreadsheet and database software.  
**KSA 05** | Skills include sophisticated service orientation, ability to multi-task effectively in a varied, high volume environment, sound judgment and decision-making, reasoning, ability to develop original ideas to solve problems, and effective verbal and written communication skills.  
**KSA 06** | Thorough knowledge of finance, accounting, business and systems operations and regulatory compliance requirements.  
**KSA 07** | Thorough knowledge of industry best practices.  
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---|---  
**KSA 01** | Thorough knowledge of organizational operational, personnel, and financial transactions and financial systems.  
**KSA 02** | Ability to evaluate processes to establish and maintain strong internal control elements and appropriate accountability structures.  
**KSA 03** | Excellent interpersonal skills and ability to work effectively across the organization at all levels.  
**KSA 04** | Excellent skills in use of spreadsheet and database software.  
**KSA 05** | Skills include sophisticated service orientation, strong management skills, leadership skills, sound judgment and decision-making, critical thinking, creative problem solving, and effective verbal and written communication skills.  
**KSA 06** | Thorough knowledge of finance, accounting, business and systems operations and regulatory compliance requirements.  
**KSA 07** | Thorough knowledge of industry best practices.  
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**KSA 01** | Advanced knowledge of organizational operational, personnel, and financial transactions and financial systems.  
**KSA 02** | Expertise in internal control practices. Experience in implementing controls that strengthen the control environment throughout the organization.  
**KSA 03** | Excellent interpersonal skills and ability to work effectively across the organization at all levels.  
**KSA 04** | Advanced skills in use of spreadsheet and database software.  
**KSA 05** | Skills include sophisticated service orientation, strong management skills, leadership skills, sound judgment and decision-making, critical thinking, creative problem solving, and effective verbal and written communication skills.  
**KSA 06** | Advanced knowledge of finance, accounting, business and systems operations and regulatory compliance requirements.  
**KSA 07** | Advanced knowledge of industry best practices.  
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**KSA 01** | Expert knowledge of industry systems and practices and their usage at a campus, medical center or Office of the President.  
**KSA 02** | Expertise in internal control practices. Experience in implementing controls that strengthen the control environment throughout the organization.  
**KSA 03** | Expert people management skills.  
**KSA 04** | Ability to present complex information in an effective manner.  
**KSA 05** | Highly sophisticated judgment and decision-making, critical thinking, and creative problem solving.  
**KSA 06** | Expert leadership skills needed to assume responsibility for the overall operational success of the function.  
**KSA 07** | Ability to work effectively across the organization at all levels.  
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| KSA 09        |         |                                                                                                                                          |
| KSA 10        |         |                                                                                                                                          |
| KSA 11        |         |                                                                                                                                          |
| KSA 12        |         |                                                                                                                                          |
| KSA 13        |         |                                                                                                                                          |
| KSA 14        |         |                                                                                                                                          |
| KSA 15        |         |                                                                                                                                          |

<table>
<thead>
<tr>
<th>Environment</th>
<th>Campus, medical center or other university setting and various external venues.</th>
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<th>Campus, medical center or Office of the President and various external venues.</th>
</tr>
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<tbody>
<tr>
<td>Career Path 1</td>
<td>Financial Services Mgr 2</td>
<td>Financial Services Mgr 3</td>
<td>Financial Services Mgr 4</td>
<td>Career Path open</td>
</tr>
<tr>
<td>Career Path 2</td>
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<td>Career Path 3</td>
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<td>Career Path 5</td>
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<td>Career Path 6</td>
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