### Job Function: Finance

**Job Family:** Financial Administration and Operations – Professional

**Job Family Summary:** Perform or manage financial and business operational practices to create the highest level of organizational efficiency possible for a full range of operations, which may include general services, accounts payable, payroll, or specialty disciplines. Please note this family best represents those jobs with multiple or blended financial operations roles; please see primary Finance job families (such as Accounting, Financial Analysis, Research Administration, etc.) for roles responsible for specific areas of finance.

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<thead>
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<th>Job Title: Financial Administrator I</th>
<th>Job Title: Financial Administrator II</th>
<th>Job Title: Financial Administrator III</th>
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</thead>
<tbody>
<tr>
<td><strong>Job Code:</strong> F0855P</td>
<td><strong>Job Code:</strong> F0856P</td>
<td><strong>Job Code:</strong> F0857P</td>
</tr>
<tr>
<td><strong>Grade Level:</strong> 55</td>
<td><strong>Grade Level:</strong> 56</td>
<td><strong>Grade Level:</strong> 57</td>
</tr>
<tr>
<td><strong>Exemption:</strong> Exempt</td>
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<tr>
<td>Independently perform financial administration including budget verification and preparation, financial analysis, and financial reporting.</td>
<td>Independently perform day-to-day financial administration including preparing, verifying, and monitoring budgets, financial analysis, forecasting, and application of financial policies.</td>
<td>Independently perform complex financial administration including budget development, financial analysis, and consultation. Provide recommendations for the use of financial resources.</td>
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<thead>
<tr>
<th>Core Duties</th>
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| - Perform financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.  
- May develop, forecast, and administer budget  
- Verify budget, identify, analyze and resolve discrepancies  
- Perform financial analysis and modeling  
- Prepare financial reports  
- Apply financial policies, compliance and accounting procedures  
- May provide training to clients and staff  
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations | - Perform financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.  
- May develop, forecast, and administer budget  
- Verify budget, identify, analyze and resolve discrepancies  
- Perform financial analysis and modeling to forecast income and expenses  
- Prepare varied financial reports, including budget-to-actual reporting  
- Apply financial policies, compliance and accounting procedures  
- May provide training to clients and staff  
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations | - Perform financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.  
- Develop, forecast, and administer complex budgets  
- Verify budgets, identify, analyze and resolve discrepancies  
- Perform financial analysis and modeling to forecast revenue, expenses, and income  
- Develop and design financial reports for management  
- Provide technical advice and problem resolution for a school/unit financial community on financial administration  
- May provide training to clients and staff  
- Provide management with recommendations in the development of financial policies  
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations |
<table>
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<tr>
<th>Basic Qualifications</th>
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<tr>
<td>• Minimum of 1 year relevant work experience</td>
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<td>• Minimum of 5 years’ relevant work experience</td>
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<thead>
<tr>
<th>Additional Qualifications and Skills</th>
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</thead>
<tbody>
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<td>• Knowledge of Microsoft Office Suite, advanced excel skills</td>
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<tr>
<td>• Working knowledge of basic financial administration principles</td>
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<td>• Knowledge of advanced financial administration principles</td>
</tr>
<tr>
<td>• Demonstrated experience with financial systems and data query tools</td>
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<tr>
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<tr>
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## Job Family Matrix

**Job Function:** Finance  
**Job Family:** Financial Administration and Operations – Professional

### Job Family Summary:
Perform or manage financial and business operational practices to create the highest level of organizational efficiency possible for a full range of operations, which may include general services, accounts payable, payroll, or specialty disciplines. Please note this family best represents those jobs with multiple or blended financial operations roles; please see primary Finance job families (such as Accounting, Financial Analysis, Research Administration, etc.) for roles responsible for specific areas of finance.

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<tr>
<th>Job Title: Financial Administrator IV</th>
<th>Job Title: Financial Administrator V</th>
<th>Job Title: Financial Administrator VI</th>
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</thead>
<tbody>
<tr>
<td>Job Code: F0858P</td>
<td>Job Code: F0859P</td>
<td>Job Code: F0860P</td>
</tr>
<tr>
<td>Grade Level: 58 Exemption: Exempt</td>
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<td>Grade Level: 60 Exemption: Exempt</td>
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<td>Effective/Revision Date: January 2017</td>
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<td>Rec. Effective/Revision Date: January 2017</td>
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</tbody>
</table>

### Core Duties

**Financial Administrator IV**
- Perform financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.
- May function as a subject matter expert and/or project lead on financial operations
- Develop, forecast and administer complex annual budget(s), including forecasting and multi-year planning
- Verify budgets, identify, analyze and resolve complex issues and discrepancies
- Provide research and solutions to financial operations challenges
- Communicate key financial issues to management and recommend related solutions
- Perform highly complex financial analysis and modeling
- Develop specialized financial reports for use in strategic planning
- Provide staff mentoring and training
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations

**Financial Administrator V**
- Lead financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.
- Function as a subject matter expert or project lead on financial operations
- Lead the development of complex annual budget(s), including specialized financial analysis and modeling
- Verify budgets, identify, analyze and resolve complex discrepancies
- Develop new and advanced financial analysis techniques and methods
- Provide specialized research and advanced solutions to financial operations challenges
- Act as resource and information source regarding financial policy development
- Advise on developing financial plans and recommend implementation processes and methods
- Provide advanced financial training and reporting to university audiences
- Provide staff mentoring and training
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations

**Financial Administrator VI**
- Direct financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.
- Function as a subject matter expert and/or project lead on financial operations
- Lead the development of financial operations administration policies and procedures and ensure implementation
- Develop strategic financial plans and systems and ensure implementation
- Conduct resource planning initiatives and ensure all financial operations are functioning properly
- Develop highly complex annual budget(s), including specialized financial analysis and modeling
- Verify budgets, identify, analyze and resolve complex issues
- Provide specialized research and advanced solutions to financial operations challenges
- Provide staff mentoring and training
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations
**Basic Qualifications**
- Bachelor’s degree or equivalent work experience required
- Minimum of 7 years’ relevant work experience

**Basic Qualifications**
- Bachelor’s degree or equivalent work experience required
- Minimum of 8 years’ relevant work experience

**Basic Qualifications**
- Bachelor’s degree or equivalent work experience required
- Minimum of 10 years’ relevant work experience

**Additional Qualifications and Skills**
- MBA or Master’s degree in relevant field
- Knowledge of Microsoft Office Suite, advanced excel skills
- Knowledge of advanced financial administration principles
- Demonstrated experience with financial systems and data query tools

**Additional Qualifications and Skills**
- MBA or Master’s degree in relevant field
- Knowledge of Microsoft Office Suite, advanced excel skills
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**Additional Qualifications and Skills**
- MBA or Master’s degree in relevant field
- Knowledge of Microsoft Office Suite, advanced excel skills
- Knowledge of advanced financial administration principles
- Demonstrated experience with financial systems and data query tools

**Certificates and Licenses**

**Certificates and Licenses**

**Certificates and Licenses**

**Physical Requirements**
- Work is performed in an office setting

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**Physical Requirements**
- Work is performed in an office setting

**Working Conditions**

**Working Conditions**

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**Working Conditions**
# Job Family Matrix

**Job Function:** Finance  
**Job Family:** Financial Administration and Operations - Management  

**Job Family Summary:** Perform or manage financial and business operational practices to create the highest level of organizational efficiency possible for a full range of operations, which may include general services, accounts payable, payroll, or specialty disciplines. Please note this family best represents those jobs with multiple or blended financial operations roles; please see primary Finance job families (such as Accounting, Financial Analysis, Research Administration, etc.) for roles responsible for specific areas of finance.

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<tbody>
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<td>56</td>
<td>Exempt</td>
<td>January 2017</td>
</tr>
<tr>
<td>Financial Administration and Ops Mgt III</td>
<td>57</td>
<td>Exempt</td>
<td>January 2017</td>
</tr>
<tr>
<td>Financial Administration and Ops Mgt IV</td>
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## Core Duties

- **Responsibility:** Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment.
- **Financial Management:** Manage financial operations and projects for functions, which may include payroll, procurement, accounts payable and receivable.
- **Information Management:** Serve as the principal source of information on financial policies and procedures and provide guidance to faculty, staff and students.
- **Department Leadership:** Collaborate with the department’s leadership and managers on departmental financial operations.
- **Development:** Assist in developing departmental financial policies and procedures.
- **Reporting:** Monitor activities and provide periodic reports on budgets, expenses and compliance regulations for funding.
- **Analysis:** Responsible for analysis and forecasting of budgets and long-term financial plans.
- **Training:** Train administrators and support staff on the department’s financial systems.
- **Compliance:** Ensure financial compliance with University policies and procedures and applicable legal rules and regulations.

- **Responsibility:** Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment.
- **Financial Management:** Manage business operations and administration that may include financial reporting, compliance, development of systems, and review and approval of transactions.
- **Technical Expertise:** Provide technical expertise, problem-resolution, and training.
- **Planning:** Prepare, administer, analyze, model, and forecast budgets to inform financial planning and decision making.
- **Resolution:** May oversee interim and year-end fiscal and processes.
- **Policies:** Serve as the liaison within and between the School/ Unit and the University to provide comprehensive financial analysis and budget management.
- **Compliance:** Ensure financial compliance with University policies and procedures and applicable legal rules and regulations.

- **Responsibility:** Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment.
- **Financial Management:** Provide guidance, management, and oversight of one or more financial functions, which may include planning, analysis, budgeting, and implementation of processes and policies.
- **Transactions:** May manage regular processing of all financial transactions.
- **Budget:** May develop and manage budget(s).
- **Closing:** Oversee interim year-end financial closing processes.
- **Analysis:** Analyze metrics and identifies opportunities to streamline processes; develop and implement action plans for improved procedures.
- **Accuracy:** Ensure department’s accurate and timely financial reporting.
- **Challenges:** Identify operational challenges; research and implement solutions.
- **Training:** Design, develop and manage financial training.
- **Representation:** Represent department to internal and external constituencies.
- **Compliance:** Ensure financial compliance with University policies and procedures and applicable legal rules and regulations.
### Basic Qualifications
- Bachelor’s degree or equivalent work experience required
- Minimum of 3 years’ relevant work experience
- Bachelor’s degree or equivalent work experience required
- Minimum of 5 years’ relevant work experience
- Bachelor’s degree or equivalent work experience required
- A minimum of 7 years relevant work experience
- Supervisory Experience

### Additional Qualifications and Skills
- Knowledge of Microsoft Office Suite, intermediate excel skills
- Working knowledge of basic financial operations principles
- Supervisory experience
- MBA or Master’s degree in relevant field
- Knowledge of Microsoft Office Suite, advanced excel skills
- Knowledge of advanced financial operations principles
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### Certificates and Licenses

### Physical Requirements
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**Job Summary**

| Responsible for the overall direction and oversight of financial operations, which may include payroll, accounting, accounts payable/receivable, procurement, capital projects, endowment funding, research administration, or other function. | Provide strategic direction, leadership, and oversight of financial operations for multiple finance and/or operational functions. |

**Core Duties**

**Left:**
- Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment
- Manage multiple financial operations, which may include systems development, data analysis, budgeting and reporting while identifying opportunities for operational integration and improvement
- Lead department goal setting, planning, and process development
- Identify potential operational challenges and propose solutions
- Develop and implement operational policies, procedures and training for financial staff
- Manage ongoing relationships with external vendors and consultants
- Collaborate with university-wide leadership to continuously approve processes, policies and procedures
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations

**Right:**
- Responsible for effective staff management, including hiring and orientation, training and development, workflow and performance management, and the promotion of an inclusive and innovative work environment
- Direct multiple financial operations and provide strategic financial leadership
- Determine strategic direction of department by establishing goals and implementing new initiatives; develop and implement financial policies and procedures
- Guide the development of highly complex annual budget(s), including specialized financial analysis and modeling
- Serve as a key resource for staff on strategic financial operational planning
- Select and manage ongoing relationships with external consultants and advisors
- Collaborate with University-wide finance leadership to develop financial processes, policies and procedures
- Ensure financial compliance with University policies and procedures and applicable legal rules and regulations
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