

## Job Family Matrix

<b>Job Function:</b> Finance		<b>Job Family:</b> Financial Administration and Operations – Professional	
<p><b>Job Family Summary:</b> 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.</p>			
<b>Job Title:</b> Financial Administrator I		<b>Job Title:</b> Financial Administrator II	
<b>Job Code:</b> F0855P		<b>Job Code:</b> F0856P	
<b>Grade Level:</b> 55	<b>Exemption:</b> Exempt	<b>Grade Level:</b> 56	<b>Exemption:</b> Exempt
<b>Effective/Revision Date:</b> January 2017		<b>Effective/Revision Date:</b> January 2017	
<b>Job Summary</b>		<b>Job Summary</b>	
Independently perform financial administration including budget verification and preparation, financial analysis, and financial reporting.		Independently perform day-to-day financial administration including preparing, verifying, and monitoring budgets, financial analysis, forecasting, and application of financial policies.	
<b>Core Duties</b>		<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• Perform financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.</li> <li>• May develop, forecast, and administer budget</li> <li>• Verify budget, identify, analyze and resolve discrepancies</li> <li>• Perform financial analysis and modeling</li> <li>• Prepare financial reports</li> <li>• Apply financial policies, compliance and accounting procedures</li> <li>• May provide training to clients and staff</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>		<ul style="list-style-type: none"> <li>• Perform financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.</li> <li>• May develop, forecast, and administer budget</li> <li>• Verify budget, identify, analyze and resolve discrepancies</li> <li>• Perform financial analysis and modeling to forecast income and expenses</li> <li>• Prepare varied financial reports, including budget-to-actual reporting</li> <li>• Apply financial policies, compliance and accounting procedures</li> <li>• May provide training to clients and staff</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	
		<ul style="list-style-type: none"> <li>• Perform financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.</li> <li>• Develop, forecast, and administer complex budgets</li> <li>• Verify budgets, identify, analyze and resolve discrepancies</li> <li>• Perform financial analysis and modeling to forecast revenue, expenses, and income</li> <li>• Develop and design financial reports for management</li> <li>• Provide technical advice and problem resolution for a school/unit financial community on financial administration</li> <li>• May provide training to clients and staff</li> <li>• Provide management with recommendations in the development of financial policies</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	

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Basic Qualifications	Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 1 year relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 3 years' relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 5 years' relevant work experience</li> </ul>
Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>• Working knowledge of basic financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>• Working knowledge of basic financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> </ul>	<ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, advanced excel skills</li> <li>• Knowledge of advanced financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> </ul>
Certificates and Licenses	Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements	Physical Requirements
Working Conditions	Working Conditions	Working Conditions
<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>	<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>	<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>

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<b>Job Function:</b> Finance		<b>Job Family:</b> Financial Administration and Operations – Professional	
<b>Job Family Summary:</b> 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.			
<b>Job Title:</b> Financial Administrator IV	<b>Job Title:</b> Financial Administrator V	<b>Job Title:</b> Financial Administrator VI	
<b>Job Code:</b> F0858P	<b>Job Code:</b> F0859P	<b>Job Code:</b> F0860P	
<b>Grade Level:</b> 58 <b>Exemption:</b> Exempt	<b>Grade Level:</b> 59 <b>Exemption:</b> Exempt	<b>Grade Level:</b> 60 <b>Exemption:</b> Exempt	
<b>Effective/Revision Date:</b> January 2017	<b>Effective/Revision Date:</b> January 2017	<b>Rec. Effective/Revision Date:</b> January 2017	
<b>Job Summary</b>		<b>Job Summary</b>	
Responsible for comprehensive financial administration, budgeting and operations. Provide management with analysis and reporting. Advise on financial planning.		Lead comprehensive financial administration, budgeting and operations for one or more functions. Act as key financial resource. Advise on financial policy decisions, goals and implementation.	
<b>Core Duties</b>		<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• Perform financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.</li> <li>• May function as a subject matter expert and/or project lead on financial operations</li> <li>• Develop, forecast and administer complex annual budget(s), including forecasting and multi-year planning</li> <li>• Verify budgets, identify, analyze and resolve complex issues and discrepancies</li> <li>• Provide research and solutions to financial operations challenges</li> <li>• Communicate key financial issues to management and recommend related solutions</li> <li>• Perform highly complex financial analysis and modeling</li> <li>• Develop specialized financial reports for use in strategic planning</li> <li>• Provide staff mentoring and training</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>		<ul style="list-style-type: none"> <li>• Lead financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.</li> <li>• Function as a subject matter expert or project lead on financial operations</li> <li>• Lead the development of complex annual budget(s), including specialized financial analysis and modeling</li> <li>• Verify budgets, identify, analyze and resolve complex discrepancies</li> <li>• Develop new and advanced financial analysis techniques and methods</li> <li>• Provide specialized research and advanced solutions to financial operations challenges</li> <li>• Act as resource and information source regarding financial policy development</li> <li>• Advise on developing financial plans and recommend implementation processes and methods</li> <li>• Provide advanced financial training and reporting to university audiences</li> <li>• Provide staff mentoring and training</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	
		<ul style="list-style-type: none"> <li>• Direct financial operations that may include payroll, accounting, accounts payable/receivable, procurement, research administration etc.</li> <li>• Function as a subject matter expert and/or project lead on financial operations</li> <li>• Lead the development of financial operations administration policies and procedures and ensure implementation</li> <li>• Develop strategic financial plans and systems and ensure implementation</li> <li>• Conduct resource planning initiatives and ensure all financial operations are functioning properly</li> <li>• Develop highly complex annual budget(s), including specialized financial analysis and modeling</li> <li>• Verify budgets, identify, analyze and resolve complex issues</li> <li>• Provide specialized research and advanced solutions to financial operations challenges</li> <li>• Develop new and advanced financial analysis techniques and methods</li> <li>• Provide specialized and advanced technical financial training and reporting to university audiences</li> <li>• Provide staff mentoring and training</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	

# Job Family Matrix

Basic Qualifications	Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 7 years' relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 8 years' relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 10 years' relevant work experience</li> </ul>
Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>• MBA or Master's degree in relevant field</li> <li>• Knowledge of Microsoft Office Suite, advanced excel skills</li> <li>• Knowledge of advanced financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> </ul>	<ul style="list-style-type: none"> <li>• MBA or Master's degree in relevant field</li> <li>• Knowledge of Microsoft Office Suite, advanced excel skills</li> <li>• Knowledge of advanced financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> </ul>	<ul style="list-style-type: none"> <li>• MBA or Master's degree in relevant field</li> <li>• Knowledge of Microsoft Office Suite, advanced excel skills</li> <li>• Knowledge of advanced financial administration principles</li> <li>• Demonstrated experience with financial systems and data query tools</li> </ul>
Certificates and Licenses	Certificates and Licenses	Certificates and Licenses
Physical Requirements	Physical Requirements	Physical Requirements
Working Conditions	Working Conditions	Working Conditions
<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>	<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>	<ul style="list-style-type: none"> <li>• Work is performed in an office setting</li> </ul>

## Job Family Matrix

<b>Job Function:</b> Finance		<b>Job Family:</b> Financial Administration and Operations - Management	
<b>Job Family Summary:</b> 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.			
<b>Job Title:</b> Financial Administration and Ops Mgt II		<b>Job Title:</b> Financial Administration and Ops Mgt III	
<b>Job Code:</b> F0856M		<b>Job Code:</b> F0857M	
<b>Grade Level:</b> 56 <b>Exemption:</b> Exempt		<b>Grade Level:</b> 57 <b>Exemption:</b> Exempt	
<b>Effective/Revision Date:</b> January 2017		<b>Effective/Revision Date:</b> January 2017	
<b>Job Summary</b>		<b>Job Summary</b>	
Supervise day-to-day financial operations for a department/unit.		Manage finance, accounting, and budget or other functional operations such as accounts payable or receivable, payroll, procurement, capital projects, endowment funding, or sponsored/non-sponsored research.	
<b>Core Duties</b>		<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• 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</li> <li>• Manage financial operations and projects for functions, which may include payroll, procurement, accounts payable and receivable</li> <li>• Serve as the principal source of information on financial policies and procedures and provide guidance to faculty, staff and students</li> <li>• Collaborate with the department's leadership and managers on departmental financial operations</li> <li>• Assist in developing departmental financial policies and procedures</li> <li>• Monitor activities and provide periodic reports on budgets, expenses and compliance regulations for funding</li> <li>• Responsible for analysis and forecasting of budgets and long-term financial plans</li> <li>• Train administrators and support staff on the department's financial systems</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>		<ul style="list-style-type: none"> <li>• 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</li> <li>• Manage business operations and administration that may include financial reporting, compliance, development of systems, and review and approval of transactions</li> <li>• Provide technical expertise, problem-resolution, and training</li> <li>• Prepare, administer, analyze, model, and forecast budgets to inform financial planning and decision making</li> <li>• May oversee interim and year-end fiscal and processes</li> <li>• Serve as the liaison within and between the School/ Unit and the University to provide comprehensive financial analysis and budget management</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	
		<ul style="list-style-type: none"> <li>• 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</li> <li>• Provide guidance, management, and oversight of one or more financial functions, which may include planning, analysis, budgeting, and implementation of processes and policies</li> <li>• May manage regular processing of all financial transactions</li> <li>• May develop and manage budget(s)</li> <li>• Oversee interim year-end financial closing processes</li> <li>• Analyze metrics and identifies opportunities to streamline processes; develop and implement action plans for improved procedures</li> <li>• Ensure department's accurate and timely financial reporting</li> <li>• Identify operational challenges; research and implement solutions</li> <li>• Design, develop and manage financial training</li> <li>• Represent department to internal and external constituencies</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	

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<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 3 years' relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 5 years' relevant work experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• A minimum of 7 years relevant work experience</li> <li>• Supervisory Experience</li> </ul>
Additional Qualifications and Skills	Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>• Knowledge of Microsoft Office Suite, intermediate excel skills</li> <li>• Working knowledge of basic financial operations principles</li> <li>• Supervisory experience</li> </ul>	<ul style="list-style-type: none"> <li>• MBA or Master's degree in relevant field</li> <li>• Knowledge of Microsoft Office Suite, advanced excel skills</li> <li>• Knowledge of advanced financial operations principles</li> <li>• Supervisory Experience</li> </ul>	<ul style="list-style-type: none"> <li>• MBA or Master's degree in relevant field</li> <li>• Knowledge of Microsoft Office Suite, advanced excel skills</li> <li>• Knowledge of advanced financial operations principles</li> </ul>
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<b>Job Title:</b> Financial Administration and Ops Mgt V	<b>Job Title:</b> Financial Administration and Ops Mgt VI
<b>Job Code:</b> F0859M	<b>Job Code:</b> F0860M
<b>Grade Level:</b> 59 <b>Exemption:</b> Exempt	<b>Grade Level:</b> 60 <b>Exemption:</b> Exempt
<b>Effective/Revision Date:</b> January 2017	<b>Effective/Revision Date:</b> January 2017
<b>Job Summary</b>	
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.
<b>Core Duties</b>	
<ul style="list-style-type: none"> <li>• 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</li> <li>• Manage multiple financial operations, which may include systems development, data analysis, budgeting and reporting while identifying opportunities for operational integration and improvement</li> <li>• Lead department goal setting, planning, and process development</li> <li>• Identify potential operational challenges and propose solutions</li> <li>• Develop and implement operational policies, procedures and training for financial staff</li> <li>• Manage ongoing relationships with external vendors and consultants</li> <li>• Collaborate with university-wide leadership to continuously approve processes, policies and procedures</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>	<ul style="list-style-type: none"> <li>• 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</li> <li>• Direct multiple financial operations and provide strategic financial leadership</li> <li>• Determine strategic direction of department by establishing goals and implementing new initiatives; develop and implement financial policies and procedures</li> <li>• Guide the development of highly complex annual budget(s), including specialized financial analysis and modeling</li> <li>• Serve as a key resource for staff on strategic financial operational planning</li> <li>• Select and manage ongoing relationships with, external consultants and advisors</li> <li>• Collaborate with University-wide finance leadership to develop financial processes, policies and procedures</li> <li>• Ensure financial compliance with University policies and procedures and applicable legal rules and regulations</li> </ul>

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Basic Qualifications	Basic Qualifications
<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 8 years relevant work experience</li> <li>• Supervisory experience</li> </ul>	<ul style="list-style-type: none"> <li>• Bachelor's degree or equivalent work experience required</li> <li>• Minimum of 10 years' relevant work experience</li> <li>• Supervisory experience</li> </ul>
Additional Qualifications and Skills	Additional Qualifications and Skills
<ul style="list-style-type: none"> <li>• MBA or Master's degree in relevant field</li> <li>• Knowledge of Microsoft Office Suite, advanced excel skills</li> <li>• Knowledge of advanced financial administration principles</li> </ul>	<ul style="list-style-type: none"> <li>• MBA or Master's degree in relevant field</li> <li>• Knowledge of Microsoft Office Suite, advanced excel skills</li> <li>• Knowledge of advanced financial administration principles</li> </ul>
Certificates and Licenses	Certificates and Licenses
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