



JOB FAMILY CONCEPT

This family consists of three levels of professional fiscal work – entry through the senior level. Levels are distinguished based on the complexity and scope of responsibilities, the degree of specialization, and the degree of independent functioning. This job family is distinguished from the Fiscal Technician family by the requirement for professional fiscal preparation and the application of accounting or finance theory. The fiscal professional job family addresses responsibility for the following functions:

- Analysis, interpretation and management of financial accounting data
- Creating, managing, and analyzing budgets
- Creating projections
- Budget analysis
- Reporting

Incumbents may perform one or more of these functions in support of a wide range of equivalent fiscal activities.

This family provides extensive professional fiscal expertise, guidance, and technical assistance. This job family covers several areas of fiscal expertise including:

- Fiscal analysis
- Financial accounting
- Fund Accounting
- Accounts receivable and payable
- Budget analysis, preparation and management
- Grants & Contracts
- Payroll
- Travel

TYPICAL FUNCTIONS

[Note: A single position may involve one or more of the functions listed, and may include functions not listed.]

- Analyze and interpret information that is gathered/received
- Provide future cost projections
- Develop or assist in developing processes and procedures
- Prepare reports and trends analyses
- Retrieve and manipulate data for reporting
- Assist in, or perform the design, development and evaluation of financial information systems and/or fiscal policy



- Perform professional budget analyses in the development and monitoring of institute budgets
- Set up accounts
- Develop record keeping and reporting procedures
- Participate in budget development and program planning
- Coordinate diverse, unit-wide fiscal support functions
- Lead or supervise staff
- Interpret and provide guidance on state/federal regulations

LEVELS AND COMPETENCIES

The primary distinction between levels is reflected in the Level Descriptors. As levels increase, scope, complexity and degree of independence increase. Higher levels may perform duties of lower levels. Education and experience are stated at the minimum threshold for the level. Additional education or experience may be desirable for some positions.

Level 1
PCLS: 02221

Grade 78
Non-Exempt

Descriptors

Works under general supervision. Performs a variety of professional accounting, budget and/or fiscal functions following established policies and procedures. Non-routine problems/issues are referred to a higher level. Analyzes accounts, interprets budgetary and statistical significance of financial data. Prepares budgets, reports and makes recommendations.

Knowledge, Skills, and Abilities

Knowledge of spreadsheet and database development, and query development specific to financial or budget analysis. Knowledge of accounting theory and generally accepted accounting principles (GAAP). Ability to analyze and implement improvements. Knowledge of rules and regulations associated with capital and operating budgets.

Experience

6 months professional fiscal experience or equivalent.

Education

BA or BS in accounting, statistics or related field, or an equivalent combination of training and experience.

Level 2
PCLS: 02222

Grade 79
Exempt

Descriptors

Work is performed under intermittent supervision. Work is periodically reviewed to verify compliance with accounting rules and regulations. Performs a wide variety of regular and recurring



moderately complex accounting, budget analysis and fiscal management functions requiring full professional competency. Participates in development of systems and procedures and long-term strategic planning. Interprets institutional, state and federal fiscal policies. Prepares budget analyses, and budget corrections/revisions. Identifies and reconciles diverse accounting problems and information. Under direction prepares budgets, compiles projections and prepares management reports. May create reports. May *lead staff as a secondary function.

Knowledge, Skills, and Abilities

Knowledge of fiscal related rules and regulations, and the ability to interpret and apply those rules and regulations. Knowledge of spreadsheet and database development, and query development specific to financial or budget analysis. Knowledge of accounting theory and generally accepted accounting principles (GAAP). Ability to lead.

Experience

1 year experience as a level 1 fiscal professional or equivalent.

Education

BA or BS in accounting, statistics or related field, or an equivalent combination of training and experience. Professional licensure may be required (e.g. CPA, CFM).

Level 3

PCLS: 02223

Grade 80

Exempt

Descriptors

Work is performed under administrative supervision. Tasks generally have no defined process for problem resolution. Performs one or more highly specialized or complex functions in support of diverse departmental or institution-wide financial activities. Manages the development of operating budgets. Prepares financial statements or specialized financial reports. Projects revenues for operating expenses. Prepares and analyzes reports and proposals for external and internal groups. Ensures compliance with rules and regulations. May be responsible for a major budget function or for evaluating financial alternatives and recommending appropriate action. May have a broad circle of influence providing guidance and assistance within the institution. May *supervise as a secondary function.

Knowledge, Skills, and Abilities

Knowledge of spreadsheet and database development, and query development specific to financial or budget analysis. Advanced knowledge of accounting theory and generally accepted accounting principles (GAAP). Ability to supervise.

Experience

Two years progressively responsible professional fiscal experience or equivalent.



UNIVERSITY
of ALASKA

FISCAL PROFESSIONAL

Job Classification

Adopted: March 23, 2003

Revised:

Education

BA or BS in accounting, statistics or related field, or an equivalent combination of training and experience. Professional licensure may be required (e.g. CPA, CFM).

- * Lead: Provide day-to-day guidance, training and direction for staff in addition to other duties. Regularly assign and review work. Is fluent in assigned area of responsibility.

Supervise: Hire, train, evaluate performance and initiate corrective action.