



JOB FAMILY CONCEPT

This family consists of three levels of fiscal management work. 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 Professional family by management responsibilities and increased accountability. This job family is distinguished from general administrative managers by having a primary focus on financial management. Positions in this family direct, manage, supervise and coordinate fiscal activities and operations including the following functions:

- Staff supervision
- Strategic and long range planning
- Final signature authority on fiscal related items
- Analysis and interpretation of rules and regulations
- Creating and managing budgets
- Financial reporting
- Creating projections
- Budget analysis and management

Positions supervise work units responsible for fiscal activities and/or direct system-wide complex fiscal programs. These work units occur throughout the university system and include MAU finance offices, institute finance offices, departmental finance offices, and research institutions.

This family provides unit management, fiscal expertise and guidance in several areas including:

- Fiscal analysis
- Fund accounting
- General accounting
- Budget 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.]

- Direct/manage/supervise staff and functions of fiscal professional or technical unit(s)
- Guide and manage staff in all fiscal related departmental processes
- Authorized to commit the organization to expenditures
- Provide analysis and interpretation of information that is gathered/received



- Provide future cost projections
- Develop processes and procedures
- Prepare and review grant/contract proposals in compliance with granting agency requests
- Perform advanced professional accounting functions
- Prepare management reports and trends analyses
- Ensure compliance with internal and external funding and reporting requirements
- Assign costs associated with fiscal activities

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: 02201

Grade 80
Exempt

Descriptors

Works under general direction. Manages a fiscal professional unit that is either large in scope* or in complexity*. Performs fiscal professional duties. Prepares management reports, approves charges and acts as the signature authority for journal vouchers. Identifies resource needs; prepares and submits budget requests; allocates resources accordingly. Establishes schedules and methods for providing assigned fiscal services.

Knowledge, Skills, and Abilities

Knowledge of accounting theory and generally accepted accounting principles (GAAP). Knowledge of strategic planning procedures and project management. Knowledge of cost benefit analysis, budget forecasting requirements, and budget preparation procedures. Ability to supervise.

Experience

Two years experience as a fiscal professional, or equivalent.

Education

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

Level 2
PCLS: 02202

Grade 81
Exempt

Descriptors

Work is performed under general direction. Manages a fiscal professional unit that is moderate in both scope* and in complexity*. In conjunction with higher level managers, forecasts fiscal needs/commitments, develops processes, and participates in planning.



Knowledge, Skills, and Abilities

Knowledge of accounting theory and generally accepted accounting principles (GAAP). Knowledge of complex spreadsheet and database development, and of computer generated reports. Ability to recommend actions for improvements to current processes. Knowledge of rules and regulations associated with fiscal activities. Ability to communicate reporting requirements to lower level staff.

Experience

Accounting theory and analysis. Three years experience as a fiscal professional, or equivalent. Experience supervising/leading staff.

Education

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

Level 3

PCLS: 02203

**Grade 82
Exempt**

Descriptors

Work is performed under long-range administrative supervision. Directs a large and diverse fiscal program involving multiple work units that is both large in scope* and complexity* and/or direct a system-wide complex fiscal program and develop related policies and systems. Typically a second line supervisor. Authority to commit the organization to major expenditures and obligations. Forecasts fiscal needs/commitments, develops long range and strategic plans, develops processes, and participates in planning on an organization wide scope.

Knowledge, Skills, and Abilities

Knowledge of accounting theory and generally accepted accounting principles (GAAP). Knowledge of complex spreadsheet and database development, and of computer generated reports. Knowledge of rules and regulations associated with fiscal activities, and ability to interpret these rules and regulations. Knowledge of an area of fiscal specialty (e.g. debt management, tax compliance, business planning). Ability to develop/design improvements to accounting processes. Ability to design and introduce fiscal programs and systems having system-wide impact. Supervisory/management experience.

Experience

Accounting theory and analysis. Five years experience combined fiscal professional, and management, or equivalent. Supervisory experience.

Education

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



* **Complexity:** Refers to the diversity of rules and regulations (e.g. federal, state, and university regulations, Generally Accepted Accounting Principles (GAAP), Federal Acquisition Regulations (FAR), and Governmental Accounting Standards Board (GASB), Financial Accounting Standards Board (FASB), National Automated Clearing House Association (NACHA), Uniform Commercial Code (UCC), the Internal Revenue Code, and contractual agreements). Complex positions typically work with multiple funding sources (e.g. federal, state, and private). Complexity increases as the number of funding sources and different regulations increase.

Scope: Refers to the impact that a fiscal unit has on the organization or the size of an organization and the volume/number of fiscal transactions.