

## **JOB FAMILY CONCEPT**

This family consists of four 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 of academic and/or professional preparation and the application of formal accounting or finance theory. This job family is distinguished from the Fiscal Manager job family by the absence of fiscal unit management responsibilities as the primary function. The Fiscal Professional job family addresses responsibility for the following functions:

- Analysis, interpretation and administration of financial data
- Creating, administering, and tracking budgets
- Creating projections
- Budget analysis
- Financial 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 in several areas:

- Fiscal analysis
- Financial accounting
- Fund Accounting
- Accounts receivable and payable
- Budget
- Grants & Contracts
- Payroll
- Travel
- Debt
- Tax
- Investment/Banking
- Asset management

## **TYPICAL FUNCTIONS**

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

- Analyze, prepare and interpret information that is gathered/received
- Provide future cost projections
- Develop or assist in developing processes and procedures

## FISCAL PROFESSIONAL

Job Classification

Adopted: March 23, 2003

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- 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
- Provide expertise and guidance in area of subject expertise
- Perform financial functions in service/recharge centers
- Create and deliver presentations
- Communicate effectively orally and in writing to internal and external constituencies
- 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 government and other authoritative regulations, policies, rules and procedures

### 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

\*\*\*Alternate PCLS: 09440

**Grade 78**

**Non-Exempt**

#### ***Descriptors***

Work is performed under general supervision. Perform 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. Analyze accounts, interpret budgetary and statistical significance of financial data. Prepare budgets, reports and make 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). Knowledge of rules and regulations associated with capital and operating budgets. Ability to analyze and implement improvements.

#### ***Education and Experience***

Bachelor's degree in accounting, statistics or related field and 6 months professional fiscal experience, or an equivalent combination of training and experience.

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**Level 2**

**PCLS: 02222**

**\*\*\*Alternate PCLS: 09450**

**Grade 79**

**Exempt**

***Descriptors***

Work is performed under intermittent supervision. Work is periodically reviewed to verify compliance with accounting rules and regulations. Perform a wide variety of regular and recurring moderately complex\* accounting, budget analysis and fiscal management functions requiring full professional competency. Participate in development of systems and procedures and long-term strategic planning. Interpret and apply institutional, state and federal fiscal policies. Prepare budget analyses, and budget corrections/revisions. Identify and reconcile diverse accounting problems and information. Under direction prepare budgets, compile projections and prepare management reports. May lead\*\* staff as a secondary function.

***Knowledge, Skills, and Abilities***

Same as level one, plus: Knowledge of fiscal related rules and regulations, and the ability to interpret and apply those rules and regulations. Ability to lead\*\*.

***Education and Experience***

Bachelor's degree in accounting, statistics or related field and 2 years professional fiscal experience or an equivalent combination of training and experience.

**Level 3**

**PCLS: 02223**

**Grade 80**

**Exempt**

***Descriptors***

Work is performed under administrative supervision. Tasks generally have no defined process for

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**Level 4**

**PCLS: 02224**

**Grade 81**

**Exempt**

***Descriptors***

Work is performed under general direction. Responsible for the administration of highly specialized and complex\* fiscal functions or a major budget function or program. Programs typically occur at the institution level or are one of a kind at a campus. Prepare and provide analysis for special and high level reports for review at the institutioLevel 4Level

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- \* **Complexity:** Refers to the interpretation and diversity of rules and regulations (e.g. federal, state, and university policies, 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). Complexity increases as the application, interpretation and frequency of working with these rules and regulations increases. Complex positions typically work with multiple funding sources (e.g. federal, state, and private). Complexity increases as the number of funding sources increases. Complex positions develop, forecast and have approval authority for budgets. Complexity also refers to the responsibility of multiple diverse fiscal activities and programs. Complex positions typically work with high-level stakeholders, multiple departments and campuses.
- \* **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. Scope also refers to the impact of recommendations or decisions a position has on policies and programs. Positions with large scope are responsible for multiple programs and activities which have significant impact at the campus or system level.
- \*\* **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.
- \*\*\* Exemption status determined on a case-by-case basis. Essential functions of each job will be reviewed and evaluated in accordance with Fair Labor Standards Act regulations.

[July 2009 revisions included adding Level 4, formatting document for consistency and adding alternate PCLS information.]

