

## **BUSINESS OFFICER COMPETENCY PROFILE**

**Description of Work:** Positions in this banded class administer and manage the business and financial affairs of a department, unit, or organization. Responsibilities include facilitation and management of financial resources that may be state appropriated, contracts and grants, and/or receipt generated. Employees perform a range of financial and business related duties associated with specialized areas such as accounting, budgeting, auditing, and/or grants administration. Functions assigned to the business officer role may include financial management, personnel administration/management, payroll, purchasing, inventory control, facilities coordination/planning, information technology assessment/planning and closely related work. Employees may perform or have oversight of accounts reconciliation, maintenance and reporting of financial data, financial projections, cash/receipts management, personnel planning, and facilities management. Most Business Officers have responsibility for accounting/business standards and practices, policy interpretation/implementation, the organization of work, and the supervision of others. As most Business Officers are responsible for the same functions, competency leveling should be based on the degree of employee involvement/responsibility for the function, as well as the size, scope, and nature of the department, unit, or organization.

| ROLE DESCRIPTIONS BY COMPETENCY LEVEL   |   |   |
|---|---|---|
| Contributing  | Journey   | Advanced  |
| Employees at this level are business officer professionals who apply well-defined accounting, budget and business practices to address the business needs of a department unit or organization with consistent funding sources for a limited variety of functional activities or services in a well defined business, and/or program. | Employees at this level are business officer professionals who apply a broad knowledge of accounting, budget and business practices for a department unit or organization with dynamic funding sources and a variety of functional activities, programs, and/or services. | Employees at this level are business officer professionals who apply a comprehensive knowledge of accounting, budget and business practices for a multifaceted department unit or organization with unique and specialized activities and/or services. Employees also oversee activities that impact and interface with other functional areas. |

Note: Competency statements are progressive and not all competencies apply to every position/employee. Evaluate only those that apply.

## **BUSINESS OFFICER COMPETENCY PROFILE**

| <b>Competency</b>                               | <b>Definition</b>   |
|---|---|
| <b>Business Administration</b>                  | Knowledge of appropriate business practices and procedures. Manage and improve business processes and operations by ensuring continuity, integration of policies and procedures with the organization's mission and strategic plan. Develop long- and short-term goals and objectives that support the business functions. Functions assigned to the business officer role can include financial management, personnel administration/management, payroll, purchasing, inventory control, facilities coordination/planning, information technology assessment and closely related work. |
| <b>Financial Management</b>                     | Plan and monitor the use of expenditures to meet organizational objectives and compliance; prepare budget documents and reports. Demonstrate a proficient level of professional skill and/or knowledge in business operations or accounting and financial forecasting. Allocate resources, plan procurement and oversee budgets and contracts to ensure fiscal stability of the organization.   |
| <b>Human Resources Management</b>               | Recruit, select, develop, counsel, discipline, and evaluate performance of employees to retain a diverse workforce; administer and ensure compliance with human resources policies and procedures. Observe and assess work; provide feedback; may provide technical supervision; develop knowledge, skills, and abilities of employees; and plan for and support employees in career development opportunities. As needed, develop and implement staffing strategies.   |
| <b>Information Analysis and Decision-Making</b> | Gather, organize, summarize and analyze data within prescribed timeframes. Analyze business operations and/or financial statements. Determine and ensure compliance with laws and regulations; draw conclusions; and review, examine and prepare documents. Ability to choose an effective course of action or develop appropriate solutions and/or reach conclusions. Take action consistent with available facts, constraints, and anticipated consequences.  |
| <b>Communication</b>                            | Communicate information to individuals or groups; deliver presentations suited to the characteristics and needs of the audience. Clearly and concisely convey information orally or in writing to individuals or groups to ensure that they understand the information and the message. Listen and respond appropriately to others using the appropriate media (e.g. e-mail, presentations, etc.  |

## BUSINESS OFFICER COMPETENCY PROFILE

**Business Administration:** Knowledge of appropriate business practices and procedures. Manage and improve business processes and operations by ensuring continuity, integration of policies and procedures with the organization's mission and strategic plan. Develop long- and short-term goals and objectives that support the business functions. Functions assigned to the Business Officer role can include financial management, personnel administration/management, payroll, purchasing, inventory control, facilities coordination/planning, information technology assessment and closely related work.

| Contributing   | Journey   | Advanced   |
|--|---|--|
| 1. Independently manage well-defined business functions for a department unit or an organization.          | 1. Independently manage a variety of business functions with dynamic funding sources and/or a variety of functional activities, programs, and/or services   | 1. Independently manage a broad range of business functions for a department unit or an organization with unique and specialized activities or services. Oversee activities that impact and interface with other functional areas. |
| 2. Apply established policies and procedures related to business practices and internal control procedures | 2. Interpret and/or modify policies and procedures to facilitate and ensure the application of sound business practices. May include integration of policies and procedures with work units external to the organization. Interpret, modify and monitor internal policies | 2. Develop and monitor internal policies and procedures to meet wide-ranging business needs, which may have broad impact. May include negotiating with external entities and constituents.   |
| 3. Implement business practices and procedures that support the strategic goals of the organization.       | 3. Participate and assist in the long- and short-term strategic goals and planning. May participate in planning for future growth.  | 3. Responsible for recommending and implementing long-range strategic planning, goals, and growth projections.   |

**Well-defined** – Guidelines are clearly outlined and available.

**Dynamic** – Characterized by continuous change, activity, or variety. In addition to other responsibilities, the complexity of functions such as facilities management, purchasing, IT responsibilities, and receipt-supported operations add to the dynamics of an organization.

**Unique/Specialized Needs** – Distinctive functions which singularly define and impact business operations such as revenue generation, multiple business components, joint venture consortium, etc.

**Broad Impact** – Having the capacity to affect different areas beyond the scope of the operation managed.

## BUSINESS OFFICER COMPETENCY PROFILE

**Financial Management:** Plan and monitor the financial resources of the organization (e.g., cash management, revenue) to meet organizational objectives and compliance; and prepare budget documents and reports. Demonstrate a proficient level of professional skill and/or knowledge and analysis in business operations or accounting and financial forecasting. Allocate resources, plan procurement and oversee budgets and contracts to ensure fiscal stability of the organization.

| Contributing  | Journey   | Advanced   |
|---|---|--|
| 1. Conduct financial management responsibilities in an organization primarily funded by consistent funding sources. Require a general knowledge of the organization's accounting and budget procedures. Accountable for financial transactions and practices within assigned scope of responsibility. | 1. Conduct financial management responsibilities in an organization primarily funded by a variety of dynamic and multi-dimensional funding sources (e.g., multiple contracts and grants, receipts, etc.). Require a thorough understanding of the applicable accounting and budgeting practices in order to contribute to budget development and/or capital expense proposals. Frequently serve as an internal resource on financial matters. | Conduct financial management responsibilities in a multifaceted (e.g., multiple programs, departments, etc.) organization primarily funded by a broad range of (multi-dimensional) funding sources that may include an income generation component. Require a comprehensive understanding of accounting and budgeting practices in order to submit operating budgets and prepare project/capital expense requests. Provide expertise on financial matters. |
| 2. Compile and summarize financial data to participate in budget analysis and forecasting.  | 2. Perform budget analyses and conduct budgetary forecasting in a financial environment with varied resources.  | 2. Establish long-range financial objectives to meet strategic goals of a multifaceted organization. Oversight and authority of a dynamic budgetary planning and forecasting process.  |

**Consistent Funding Sources** - Funds allocated from a source in a manner that conforms to consistent guidelines and policies.

**Dynamic** – Characterized by continuous change, activity, or variety. In addition to other responsibilities, the complexity of functions such as facilities management, purchasing, IT responsibilities and receipt-supported operations, add to the dynamics of an organization.

**Multi-faceted** – Multiple programs, services, and/or departments, etc. (Example: University Dining operations include Concessions, Student Dining, Catering, All Campus Network, fast food vendors/Food Court, and management of related systems resources).

## **BUSINESS OFFICER COMPETENCY PROFILE**

**Human Resources Supervision/Management:** Recruit, select, develop, counsel, discipline, and evaluate performance of employees to retain a diverse workforce; administer and ensure compliance with human resources policies and procedures. Observe and assess work; provide feedback; may provide technical supervision; develop knowledge, skills, and abilities of employees; and plan for and support employees in career development opportunities. As needed develop and implement staffing strategies.

| <b>Contributing</b>  | <b>Journey</b>   | <b>Advanced</b>  |
|--|--|--|
| 1. May function in a full supervisory role that includes the recruitment, selection, and salaries of employees and/or provide assistance in human resources matters to a higher-level manager in a large and more dynamic organizational unit. | 1. Function in a full supervisory role for direct reports. May serve as a resource to other supervisors in the selection process.  | 1. Supervise and manage professional level employees. Oversee unit/organization supervisors to ensure compliance with recruitment and selection policies and procedures.   |
| 2. Develop and/or implement work plans; conduct performance reviews for direct reports and address performance issues. Identify and recommend career development opportunities with employees.   | 2. Develop and implement work plans; conduct performance reviews; participate in the disciplinary process, as needed. Actively participate in ensuring employee growth and development. Plan and deliver on-the-job training. Identify and implement career progression adjustments. | 2. Oversee unit/organization supervisors to ensure compliance with performance management policies and procedures. Recommend resolution of disciplinary matters as needed. Review and authorize training opportunities and career progression adjustments for unit/organization. Lead employee growth and development initiatives. |
| 3. Assess staffing needs and make recommendations. Develop and set priorities for performing operational activities.   | 3. Plan for staffing needs and workload distribution for multi-functional areas. May identify funding source(s) for staffing.  | 3. Develop strategies and lead long term staffing plan for a diverse and dynamic workforce. Identify funding source(s).  |

## **BUSINESS OFFICER COMPETENCY PROFILE**

**Information Analysis and Decision-Making :** Gather, organize, summarize and analyze data within prescribed timeframes. Analyze business operations and/or financial statements. Determine and ensure compliance with laws and regulations; draw conclusions; review, examine and prepare documents. Ability to choose an effective course of action or develop appropriate solutions and/or reach conclusions. Take action consistent with available facts, constraints, and anticipated consequences.

| <b>Contributing</b>   | <b>Journey</b>   | <b>Advanced</b>   |
|---|--|---|
| 1. Identify, recognize, and resolve problems that have established precedents and limited impact. Refer non-standard questions and problems to higher levels. | 1. Assess and may resolve unprecedented problems that require research and review of policy and procedures. Based on delegated authority, resolve problems or compliance issues. | 1. Independently analyze and resolve unprecedented issues and problems that necessitate input from and collaboration of external sources. Serve as a resource for others in resolving issues and problems. Anticipate problems and develop resolution strategies. |
| 1. Gather, organize, and analyze financial information and other data. Review, examine and prepare documents.   | 1. Analyze moderately complex business operations and financial statements; and make recommendations for approval.   | 1. Prepare and analyze complex technical matters involving existing and emerging issues pertaining to the subject area and make recommendations from the analysis.  |

## **BUSINESS OFFICER COMPETENCY PROFILE**

**Communication:** Communicate information to individuals or groups; deliver presentations suited to the characteristics and needs of the audience. Clearly and concisely convey information orally or in writing to individuals or groups to ensure that they understand the information and the message. Listen and respond appropriately to others using the appropriate media (e.g. email, presentation, etc).

| <b>Contributing</b>   | <b>Journey</b>  | <b>Advanced</b>   |
|---|---|---|
| 1. Develop written documents and/or reports conveying factual information, general guidelines, and standard procedures. | 1. Develop and/or edit written documents and/or reports with comprehensive and interpretative information that usually spans across functional areas. Provide documentation to explain and support conclusions. | 1. Develop written documents and/or reports on complex matters that can be understood by both internal and external audiences. Documentation of conclusions and recommendations are fully supported and based on a broad knowledge of strategic goals. Documentation and/or reports may have an impact on policy and/or operations. |
| 2. Communicate factual information, general guidelines, and standard procedures.  | 2. Communicate comprehensive and interpretative information that spans across functional areas. Respond to non-routine inquiries.   | 2. Communicate information involving complex matters (both internal and external) to the department or organization. Communication may involve persuasion and negotiation with others.  |

## **BUSINESS OFFICER COMPETENCY PROFILE**

### **Recommended Minimum Training and Experience Guidelines:**

Graduation from a four-year college or university with a degree in Business Administration, Public Administration or related business area; or an equivalent combination of training and experience.

Contributing: Graduation from a four-year college or university with a degree in Business Administration, Public Administration or related business area; or a two-year degree and two years of administrative, business, or financial management experience; or an equivalent combination of training and experience.

Journey: Graduation from a four-year college or university with a degree in Business Administration, Public Administration or related business area and two years of administration management or business management experience; or an equivalent combination of training and experience.

Advanced: Graduation from a four-year college or university with a degree in Business Administration, Public Administration or related business area and three years of administration management or business management experience; or an equivalent combination of training and experience

All degrees must be received from appropriately accredited institutions.

**Special Note:** This is a generalized representation of positions in this class and is not intended to identify essential work functions per ADA. Examples of competencies are primarily those of the majority of positions in this class, but may not be applicable to all positions.