



Financial Services Job Summaries

Job Code	Job Title	University Job Summary
18713 18712 18711	Vice President Finance	Vice Presidents provide strategic executive leadership for all financial activities, programs, and services. They are responsible for strategic development and administration of the Financial Services mission, goals, programs, student activities, and services. Vice Presidents represent the university externally to stakeholders and government agencies and internally as appropriate. They possess the authority to set and change the strategic goals of the areas assigned and exercise considerable latitude on how results are achieved. They exercise independent judgement for complex issues where the quality of decision-making has a critical impact on students, the strategic and operational goals of assigned areas, and the university mission. The Vice President Finance typically reports to the university president or executive leadership.
18613 18612 18611	Senior Associate Vice President	Senior Associate Vice Presidents provide executive and strategic financial leadership of university funds. They are responsible for providing assessment of programming, policy development, and budget development and oversight. They ensure execution of a financial strategy that will support the major strategic goals of the university and have direct input into the development and implementation of finance policy and procedures in compliance with legal and regulatory constraints. They articulate the university's vision, mission, and values to internal and external stakeholders. Under the direction of the Vice President Finance, Senior Associate Vice Presidents possess the authority to set and change the strategic goals of the business units or functional areas assigned, exercising considerable latitude on how results are achieved. Senior Associate Vice Presidents typically report to the Chief Finance Officers.
18516 18515 18514	Associate Vice President	Associate Vice Presidents provide strategic executive leadership to a major finance-related functional unit, such as Budget, Business Services, Procurement, or Treasury Services. They are responsible for strategic development and administration of the Financial Services mission, goals, programs, student activities, and services. Utilizing a comprehensive knowledge of the service or functional area, Associate Vice Presidents provide strategic and long-term planning, implementation, and assessment of major functional areas and ensure long-term goals are supported by the appropriate allocation of staff, space, and financial resources. They articulate the university's vision, mission, and values to internal and external stakeholders. Actions at this level have a critical impact on the overall university service delivery and legal compliance. Under the direction of the Vice President, Finance, Associate Vice Presidents possess the authority to set and change the strategic goals of the areas assigned and exercise considerable latitude on how results are achieved. They typically report to the executive leadership.
18513 18512 18511	Assistant Vice President	Assistant Vice Presidents provide strategic leadership and management of Financial Services objectives, ensuring long-term goals are aligned with industry best practices. They provide strategic and long-term planning, implementation, and assessment of major functional areas and ensure long-term goals are supported by the appropriate allocation of staff, space, and financial resources. They articulate the university's vision, mission, and values to internal and external stakeholders. Actions at this level have a critical impact on the overall university service delivery and legal compliance. In consultation with the Vice President, Finance or Senior Associate Vice President, Finance, Assistant Vice Presidents



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		<p>possess the authority to set and change the strategic goals of the business units or functional areas assigned and exercise independent judgment for complex issues while unprecedented issues may be referred to a higher level for resolution. They typically report to the executive leadership.</p>
18416 18415 18414 18413 18412 18411	Director, Financial Services	<p>Directors typically provide operational management for a team of finance professionals or a significant financial program with institutional impact. They typically ensure policy and legal compliance; manage other professional staff; and share responsibility for planning, policy formation, and strategic implementation of programs or services. Directors collaborate with internal and external constituents to achieve overall strategic goals. They have a significant impact within the department, influencing service delivery and operational goals. Under the direction of senior leadership, they exercise independent judgement for complex issues to ensure departmental objectives are met. They typically report to executive leadership.</p> <p>NOTE: The Director job is a supervisory job and is intended for positions that have three or more full-time direct reports who are typically managers of functional areas. Positions that meet the scope of the Director job that have fewer than three full-time direct reports should be placed in the Senior Administrator job.</p> <p>Senior Directors are responsible for long-range strategic planning and must possess a comprehensive knowledge of the service or functional area. They advance the service or functional area's strategic goals through innovative new programs, services, or practices. Senior Directors assume a higher level of responsibility and authority in compliance and legal matters.</p>
18326 18325 18324 18323 18322 18321	Manager, Financial Services	<p>Managers serve as operational managers responsible for one or more financial services program's daily administration and typically focus on one specialty area in finance such as accounting, budget, payroll, financial aid, financial analysis, purchasing, or treasury. They may be responsible for areas such as ensuring policy and legal compliance; administering budgets; managing multimedia communications; recruiting, training, and supervising a team of staff, interns, or students; special projects; and other operational activities. In consultation with senior leadership, they develop processes and implement new programs. They have a measurable impact within the department and influence service delivery in the school, department, or business unit. Managers work under intermittent supervision, resolving routine-to-complex issues independently. They typically report to a director or senior administrator.</p> <p>NOTE: The Manager job is a supervisory job and is intended for positions that have three or more full-time direct reports. Positions that meet the scope of the Manager and Senior Manager jobs and have fewer than three full-time direct reports should be placed in the Administrator job.</p> <p>Senior Managers participate in long-range strategic planning, which requires a comprehensive knowledge of the service or functional area. They advance the service or functional area's strategic goals beyond daily operations through innovative new practices. Senior Managers assume a higher level of responsibility and authority in compliance and legal matters.</p>



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18316 18315 18314 18313 18312 18311	Supervisor, Financial Services	<p>Supervisors provide oversight of daily operations of a small-to-medium team of financial services staff. They may be responsible for areas such as budget and resource analytics, controller services, financial reporting, payroll services, student accounting, and/or treasury services. Supervisors ensure that day-to-day operations align with short-term goals and objectives; may help senior leadership develop processes or implement new programs and/or services; and may serve as liaisons between internal departments or functional areas. They may serve as a resource for lower-level staff. Their decision-making has a measurable impact on service delivery and operational goals. Supervisors work under intermittent supervision, resolving routine-to-complex issues independently and referring more complex issues to higher-level management. They typically report to a manager or director or in some areas may report to an administrator.</p> <p>NOTE: The Supervisor job title is typically assigned to positions that have three or more full-time direct reports. However, the nature of the work and the career paths within some schools/units support the usage of the supervisor job title for positions that supervise three or more wage and/or student positions - hiring staff, assigning work, and managing performance. Positions that meet the scope of the Supervisor job and are consistently assigned supervision of 3 or more wage or student direct reports may be placed in the Supervisor role, in consultation with Human Resources. Positions who do not supervise at least three full-time direct reports, or three or more wage or student workers should be placed in the individual contributor job title that best fits the overall job content.</p> <p>Senior Supervisors participate in long-range strategic planning, which requires a comprehensive knowledge of the service or functional area. They advance the service or functional area's strategic goals beyond daily operations through innovative new practices. Senior Supervisors assume a higher level of responsibility and authority in compliance and legal matters.</p>
18916 18915 18914 18913 18912 18911	Administrator, Financial Services	<p>Administrators provide administrative management of one or more functional units, departments, or business units. They are typically responsible for overseeing and coordinating all administrative affairs, with strategic management of daily operations as a primary purpose. The role may have direct and indirect reports. They typically serve as liaisons between internal departments or functional areas in order to achieve operational goals and serve as resources to lower-level staff. Their decision-making has a significant impact on service delivery and operational goals. Administrators work under intermittent supervision, resolving complex issues independently and referring unprecedented issues to a higher level. They typically report to executive or senior leadership.</p> <p>NOTE: The primary purpose of the administrator job is the strategic management of daily operations and not primarily supervision, although the role may have direct and indirect reports.</p> <p>Senior Administrators serve in a senior capacity with the equivalent scope and authority of the Director role but with fewer than three functional area managers as direct reports. They are responsible for long-range strategic planning and the application of a comprehensive knowledge of the service or functional area. They advance the service or functional area's strategic goals beyond the internal scope of the department through innovative new</p>



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		<p>programs, services, or practices. Senior Administrators assume a higher level of responsibility and authority in compliance and legal matters.</p>
18256 18255 18254 18253 18252 18251	Financial Management Analyst	<p>Financial Management Analysts are responsible for the management and maintenance of budgetary systems and processes for areas including central finance, accounting, auditing, and reporting. They provide recommendations to senior management in matters affecting the development, implementation, and administration of the university's operating budget. Their typical responsibilities may include assisting in determining financial methods, procedures, and costs pertaining to a departmental service or program; conducting cost benefit analyses and reviewing and preparing financial and statistical reports; coordinating contract arrangements with other organizations; conducting research and analytical studies on a variety of programs and issues; and assisting in budget preparation and administration. They serve as liaisons to both internal and external stakeholders. They independently make complex decisions while referring unprecedented issues to a higher level. Financial Management Analysts typically report to a director or senior leadership.</p> <p>Senior Financial Management Analysts possess greater knowledge of tasks related to the financial management field, distinguishing them from Financial Management Analysts. They are further distinguished by the complexity of assigned work; an ability to identify options and develop solutions for unique or unprecedented situations; greater decision-making authority; and the judgment, resourcefulness, and ability to identify issues and/or areas that should be addressed differently. They are resources for others, participating in mentoring, coaching, and training.</p>
18246 18245 18244 18243 18242 18241	Finance Analyst	<p>Finance Analysts provide professional-level finance analytics in support of business operations within an academic school, department, or business unit and may focus in an area such as costing; budgeting; auditing; planning; forecasting; or systematic, transactional, or trending analysis. They perform work of varied and considerable difficulty requiring advanced data management, collection, and manipulation; evaluation; analysis; forecasting; modeling; and reporting. Their typical duties may include conducting independent complex financial analyses to develop and recommend the most appropriate short-term and long-term financial and forecast models; analyzing high volumes of data to determine new service pricing as needed in consideration of the full operational impact and business need; conducting evaluation of implemented models by tracking and determining financial status based on analysis of actual results in comparison to forecast; monitoring the accuracy and timeliness of financial activities in order to reconcile activity against contract terms; ensuring legal compliance with regard to department's financial transactions and recordkeeping; and making decisions on appropriate corrective actions, changes in process, and internal policies. Under general supervision, they make moderate-to-complex decisions independently, while referring unprecedented issues to a higher level. Finance Analysts typically report to a manager or director or in some units may report to an administrator.</p> <p>Senior Finance Analysts possess greater knowledge of the financial analytics field, distinguishing them from Finance Analysts. They are further distinguished by the complexity of assigned work; an ability to identify options and develop solutions for unique or unprecedented situations; greater decision-making authority; and the judgment, resourcefulness, and ability to identify issues and/or areas that should be addressed differently. They are resources for others, participating in mentoring, coaching, and training.</p>



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18236 18235 18234 18233 18232 18231	Accountant, Financial Services	<p>Accountants provide professional-level accounting services in support of business operations within an academic school, department, or business unit. They may apply knowledge of generally accepted accounting principles (GAAP) and procedures to manage specialized accounting records and reports; prepare statements and reports relating to an assigned area of responsibility such as budget, payroll, financial analysis, purchasing, or treasury; audit accounting transactions; assist with the development of operational policies and procedures; and draft financial projections and budgets for management review. Their work is routine and performed according to established accounting protocols. They make routine-to-moderately complex decisions while referring more complex issues to a higher level. Accountants typically report to a manager or director or in some units may report to an administrator.</p> <p>Senior Accountants possess greater knowledge of the accounting profession, distinguishing them from Accountants. They are further distinguished by the complexity of assigned work; an ability to identify options and develop solutions for unique or unprecedented situations; greater decision-making authority; and the judgment, resourcefulness, and ability to identify issues and/or areas that should be addressed differently. They are resources for others, participating in mentoring, coaching, and training.</p>
18216 18215 18214 18213 18212 18211	Finance Specialist	<p>Finance Specialists perform entry-level professional work requiring an in-depth knowledge of one or more specialized functional areas which may include finance, accounting, procurement, budget, or treasury. Their work involves initiating and maintaining accounting records and files pertinent to the receipt and disbursement of authorized funds; supplying accounting information and reports to a supervisor and/or executive management team; providing monthly reports and information for all accounts concerning allowed expenditures, commitments and balances; preparing and/or reviewing procurement, travel, petty cash, deposits, and other fiscal documents; monitoring budgets to determine trends or needs for adjustment; and assisting faculty in the development and preparation of budgets for funding proposals. They may work independently or as a member of a team. They work under general supervision, making complex decisions independently and referring unprecedented issues to an upper-level manager. Finance Specialists typically report to a manager or director or in some units may report to an administrator.</p> <p>Senior Finance Specialists possess greater knowledge of one or more specialized area in the financial services field, distinguishing them from Finance Specialists. They are further distinguished by the complexity of assigned work; an ability to identify options and develop solutions for unique or unprecedented situations; greater decision-making authority; and the judgment, resourcefulness, and ability to identify issues and/or areas that should be addressed differently. They are resources for others, participating in mentoring, coaching, and training.</p>
18116 18115 18114 18113 18112 18111	Finance Technician	<p>Finance Technicians provide finance-related customer service and operational support typically to an academic school, department, or business unit. Their work content typically includes more than one functional areas such as accounting, budget, payroll, procurement, or treasury and may include more long-range assignments such as resource planning and forecasting. Their typical duties may include managing department and faculty purchase requests; assisting with travel arrangements and reports; managing all Banner financial transactions; analyzing expenditures; tracking faculty funding, including grants and contracts; reconciling and maintaining transaction records; and serving as Departmental Records Managers. They may work independently or as a member of a team. They work</p>



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18016 18015 18014 18013 18012 18011	Financial Assistant	<p>Financial Assistants perform entry-level operational and technical tasks related to Financial Services. Their work requires a general knowledge of accounting basics, and they may work in a specific area of Financial Services or support various functional areas such as accounting, budget, payroll, procurement, or treasury. Typical duties may include receiving, reporting, and depositing funds received by the university; processing purchase and travel requests; assisting with financial inquires; gathering supporting document and performing basic reconciliations; and completing invoice forms for services and supplies. The work is routine in nature, requires limited judgment, and requires following a set of pre-established guidelines, processes, and procedures. They may work independently or as a member of a team. They work under direct supervision, resolving most standard issues independently and referring complex or unique issues to a supervisor or higher-level worker. Finance Assistants typically report to a supervisor or manager or in some areas may report to an administrator.</p> <p>Senior Finance Assistants possess greater knowledge of operational and technical tasks related to the financial services field, distinguishing them from Financial Assistants. They are further distinguished by the complexity of assigned work; an ability to identify options and develop solutions for unique or unprecedented situations; greater decision-making authority; and the judgment, resourcefulness, and ability to identify issues and/or areas that should be addressed differently. They are resources for others, participating in mentoring, coaching, and training.</p>
18426 18425 18424 18423 18422 18421	Treasury Director, Financial Services	<p>Treasury Directors typically provide operational management for capital market financing, liquidity management, financial risk management, banking relationships, and cash management. They are responsible for planning, policy formation, and strategic implementation of programs or services. They typically ensure policy and legal compliance and manage other professional staff. Treasury Directors collaborate with internal and external constituents to achieve overall strategic goals. They have a significant impact within the department, influencing service delivery and operational goals. Under the direction of senior leadership, they exercise independent judgement for complex issues to ensure departmental objectives are met. They typically report to executive leadership.</p> <p>Senior Treasury Directors are responsible for long-range strategic planning and must possess a comprehensive knowledge of the service or functional area. They advance the service or functional area's strategic goals through innovative new programs, services, or practices. Senior Treasury Directors assume a higher level of responsibility and authority in compliance and legal matters.</p>



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18276 18275 18274 18273 18272 18271	Treasury Specialist, Financial Services	<p>Treasury Specialists are responsible for various treasury functions within the Financial Services area. They collect, analyze, and interpret complex financial information and provide specialized advice to University leaders. Their typical responsibilities include analyzing cash flow to provide up-to-date forecasts and sensitivity analysis; developing, updating, and implementing liquidity plans; researching and resolving cash management errors and ensuring proper recording of transactions; managing processes for opening, modifying, and closing University bank and financial institution accounts. They may work independently or as a member of a team. They work under general supervision, making complex decisions independently and referring unprecedented issues to an upper-level manager. Treasury Specialists typically report to a manager or director or in some units may report to an administrator.</p> <p>Senior Treasury Specialists possess greater knowledge of various treasury functions within the financial field, distinguishing them from Treasury Specialists. They are further distinguished by the complexity of assigned work; an ability to identify options and develop solutions for unique or unprecedented situations; greater decision-making authority; and the judgment, resourcefulness, and ability to identify issues and/or areas that should be addressed differently. They are resources for others, participating in mentoring, coaching, and training.</p>
18266 18265 18264 18263 18262 18261	Treasury Analyst, Financial Services	<p>Treasury Analysts provide professional-level finance analytics in support of cash management and cash forecasting. Their typical duties may conducting coordinating the movement of funds between accounts, executing wire transfers, analyzing the cash flow timeline, preparing rolling annual cash flow forecasts and updating them throughout the year, and performing cash flow variance analyses. They make moderate-to-complex decisions independently while referring unprecedented issues to a higher level. Treasury Analysts typically report to a manager or director or in some units may report to an administrator.</p> <p>Senior Treasury Analysts possess greater knowledge of the financial analytics field, distinguishing them from Treasury Analysts. They are further distinguished by the complexity of assigned work; an ability to identify options and develop solutions for unique or unprecedented situations; greater decision-making authority; and the judgment, resourcefulness, and ability to identify issues and/or areas that should be addressed differently. They are resources for others, participating in mentoring, coaching, and training.</p>