



## Finance, Budget & Planning Job Family: **Plan/Research Progression**

These generic job title summaries are intended to indicate the kinds of tasks and levels of work complexity that will be required of positions classified to any of these titles and are not intended to be construed as declaring the specific duties and responsibilities of any particular position. The use of particular expressions or illustrations describing functions within a specific job title does not exclude other duties of a similar kind and/or level of complexity. Positions are classified to a particular job title based upon the predominant level of expected work complexity. ***A position that is classified into this title and band must meet the Cornell requirements for exemption under the FLSA***

### GENERIC JOB PROFILE SUMMARIES

<b>Data Reporting Coordinator INDIVIDUAL CONTRIBUTOR</b>	<b>Data Analyst INDIVIDUAL CONTRIBUTOR</b>	<b>Plan/Research Associate I INDIVIDUAL CONTRIBUTOR</b>	<b>Plan/Research Associate II INDIVIDUAL CONTRIBUTOR</b>
	Design, create, test, run, and maintain queries for regular and ad hoc reporting	Identify, collect, synthesize, and interpret statistical analyses	Formulate hypotheses and alternative explanations using diverse data sources and assist in the development and facilitation of institutional planning processes
Maintain databases; Prepare routine charts, diagrams, correspondence and technical documents to support client requests	Research, develop and maintain databases and/or datasets; Prepare somewhat complex charts, diagrams, correspondence and technical documents to support client requests	Research and develop databases and/or datasets from multiple sources; Construct tables, graphs, and summary reports to support and inform decision-making	Research and develop databases and/or datasets from multiple complex sources; Develop analytical models and narrative reports to support and inform decision-making
		Participate in and support the development of management information systems for college/unit data integrity.	Recommend requirements/data quality attributes of management information systems for university and college/unit data integrity
Gather requirements and prepare documentation on use of various reporting systems	Compile information for completion of external compliance surveys and internal ad hoc requests for information	Interpret data for submission of external compliance surveys and internal ad hoc requests for information	Interpret data and craft responses for submission to external compliance surveys and internal ad hoc requests for information
Perform routine analysis	Analyze and prepare reports, perform adhoc and somewhat complex data analysis	Gather and perform complex detailed analysis of business needs and processes; review analysis with clients to ensure needs are met	Develop detailed analysis from business needs and processes; review analysis with stakeholders to ensure needs are satisfied

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Fulfill requests for data and reports, develop basic queries and reports; perform and/or run batch jobs and data loads as well as troubleshoot queries and reports	Develop queries and metrics and provide analysis of data results using various reporting tools and data sources	Design and conduct qualitative analytical research and ad hoc queries in support of planning, policy development, and decision-making	Lead and design qualitative analytical research and ad hoc queries in support of planning, policy development, and decision-making
	Provide multiple ways to obtain answers and provide options and/or recommend alternative solutions based on data analysis	Provide analysis and guidance to clients to define and clarify data submitted by departments, uses of data tables and interpretation of statistical analyses	Provide recommendations to clients to define and clarify data submitted by departments, uses of data tables and interpretation of statistical analyses
	Serve as resource for analytic projects using a detailed understanding of the underlying data structures and relationships	Serve as an authority for analytic projects using a detailed understanding of the underlying data structures and relationships	Participate in the development and maintenance of Management Information Systems
Gather requirements for effective alternative solutions to meet desired reporting options partnering with internal/external constituencies and technical counterparts	Test effective alternative solutions to meet desired reporting options in collaboration with internal/external constituencies and technical counterparts	Recommend effective alternative solutions to meet desired reporting options in collaboration with internal/external constituencies and technical counterparts	Develop and recommend effective alternative solutions to meet desired reporting options maintaining effective partnerships with internal/external constituencies and technical counterparts
Participate in business process evaluation, enhancements and re-design efforts	Serve as liaison to define reporting procedures and determine data needs and wants	Serve as liaison to define complex reporting procedures and determine data needs and wants	Serve as staff University-wide committees; maintaining effective relationships with college and University administrative officers

**JOB FACTOR PROFILE TABLE**

<b>FACTOR PROFILE</b>	<b>11460 DATA REPORTING COORDINATOR, BAND E NEX</b>	<b>10230 DATA ANALYST, BAND E EX</b>	<b>10696 PLAN/RESEARCH ASSOCIATE I, BAND F</b>	<b>10697 PLAN/RESEARCH ASSOCIATE II, BAND G</b>
<b>MINIMUM EDUCATION AND EXPERIENCE EQUIVALENCY</b>	Associates Degree or equivalent; more than 4 years and less than 6 years experience	Bachelor's degree or equivalent; 2 but less than 4 years of experience or equivalent	Master's degree or equivalent; 3 but less than 5 years of experience or equivalent	Master's degree or equivalent; 3 but less than 5 years of experience or equivalent
<b>IMPACT</b>	Extends beyond college/unit	Moderate impact	Moderate impact	Substantial impact
<b>CONTACTS - INSIDE</b>	Coordinate activities Contribute to group projects	Assists others Cooperation of task completion	Assists others Cooperation of task completion	Provide guidance Coordinate activities
<b>CONTACTS - OUTSIDE</b>	Obtain involved information Providing information that exists within pre-established documents and or programs	Providing information that exists within pre-established documents and or programs	Providing/receiving guidance, advice or information that must be analyzed and developed by the position	Providing/receiving guidance, advice or information that must be analyzed and developed by the position
<b>CONTACTS - STUDENTS</b>	Limited contact	Limited contact	Occasional contact to provide information and instruction	Occasional contact to provide information and instruction

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<b>SUPERVISION</b>	None given	Responsible for providing occasional guidance on work methods or procedures to employees who do similar work	Responsible for providing occasional guidance on work methods or procedures to employees who do similar work	Provide guidance, counsel and information to employees throughout the University in specific support areas
<b>COMPLEXITY</b>	Frequently adapt, combine or make improvements in an existing service, product, process or programs. Work requires reasoning skills and judgment	Frequently adapt, combine or make improvements in an existing service, product, process or programs. Work requires reasoning skills and judgment	Occasionally required to develop new innovative solutions, services, products, processes or programs. Work requires sophisticated reasoning skills	Occasionally required to develop new innovative solutions, services, products, processes or programs. Work requires sophisticated reasoning skills
<b>LEVEL OF DECISION MAKING</b>	Responsible for making some decisions with requires consideration of various criteria. Decisions are usually within limits prescribed by established policies or the supervisor	Responsible for assisting in and influencing decisions concerning policy-setting, research, planning or students	Responsible for assisting in and influencing decisions concerning policy-setting, research, planning or students	Responsible for assisting in and influencing decisions concerning policy-setting, research, planning or students
<b>EFFECT OF DECISION MAKING</b>	Affect a section of a department	Directly affect multiple functional areas Limited effect on students and employees	Directly effects entire department Moderate effect on students and employees	Directly affect several dept within a college, school or administrative unit Significant effect on students and employees
<b>FREEDOM OF ACTION</b>	General supervision Rarely refers situations to the supervisor	General supervision Some interpretation of established work policies and procedures is required	Very general supervision Interpretation of work policies and procedures, and, at times deviation from standard work practice	Very general supervision Interpretation of work policies and procedures, and, at times deviation from standard work practice
<b>WORKING CONDITIONS</b>	Normal working conditions, including no or limited exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required	Normal working conditions, including no or limited exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required	Normal working conditions, including no or limited exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required	Normal working conditions, including no or limited exposure to hazardous conditions/ materials/ equipment. Safety gear may sometimes be required