



## Finance, Budget & Planning Job Family: **Finance Specialist (Non-Transaction Ctr) 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>Financial Specialist II INDIVIDUAL CONTRIBUTOR</b>	<b>Financial Specialist III INDIVIDUAL CONTRIBUTOR</b>	<b>Financial Specialist IV INDIVIDUAL CONTRIBUTOR</b>
Establishes close working relationship with Department Business Administrators, faculty and staff of units served to provide comprehensive financial information analysis, reporting; planning and budgeting.	Establishes close working relationship with Department Business Administrators, faculty and staff of units served to provide comprehensive financial information analysis, reporting; planning and budgeting.	Establishes close working relationship with Department Business Administrators, faculty and staff of units served to develop and recommend comprehensive financial analyses and reporting for leadership decision making.
Collaborates regularly with department administrators to advise on aspects of financial matters including interpretation of University financial policies and procedures.	Collaborates regularly with department administrators to advise on aspects of financial matters including interpretation of University financial policies and procedures. Recommend tools to assist department reporting and metric processing, etc.	In partnership with department administrators provide functional input into inter-institutional development; assist campus deployment, and specification of organizational needs to support University financial policies and procedures, audits, quality assurance and special reporting.
Contribute in meetings in which financial or management policies are formulated; provide analyses of special projects.	Contribute in meetings in which financial or management policies are formulated; provide analyses of special projects.	Serves as financial subject matter expert in meetings in which financial or management policies are formulated; provide analyses of special projects.
Participates in and/or implements reengineering efforts to improve service delivery and/or automate unit specific systems, reporting, etc. Develop and maintain departmental database systems for use with local networks and University mainframe data.	Develops and/or implements reengineering efforts to improve service delivery and/or automate unit specific systems, reporting, etc.	Ensure standardization of reengineering service delivery and/or automate systems, organizational financial reporting, etc. Define business functional needs, determine the most efficient technological tools, creating necessary applications and documenting the financial processes.
	Design a major PC database system to meet specific management needs; coordinate data collection for reporting to University officials.	Design a major PC database system to meet specific management needs; coordinate data collection for reporting to University officials.

<b>Financial Specialist II INDIVIDUAL CONTRIBUTOR</b>	<b>Financial Specialist III INDIVIDUAL CONTRIBUTOR</b>	<b>Financial Specialist IV INDIVIDUAL CONTRIBUTOR</b>
Provide procedural information on administrative organizations, policies, procedures, practices, overhead calculations and cost studies to support an understanding of their accuracy and/or effectiveness on a University wide basis.	Develop and provide procedural information on administrative organizations, policies, procedures, practices, overhead calculations and cost studies to support an understanding of their accuracy and/or effectiveness on a University wide basis.	Develop and provide procedural information on administrative organizations, policies, procedures, practices, overhead calculations and cost studies to support an understanding of their accuracy and/or effectiveness on a University wide basis.
In partnership with Business Service Center (BSC)/Financial Transaction Center (FTC) coordinate procurement workflow between Departments and BSC; review and assess hazards of high risk transactions/purchases.	In partnership with Business Service Center (BSC)/ Financial Transaction Center (FTC) develop procurement workflow between Departments and BSC; review and assess hazards of high risk transactions/purchases and resolves complex problems with transaction reporting.	Cultivate business relationship with Business Service Center (BSC)/ Financial Transaction Center (FTC); determine best practices; monitor, analyze and prepare various status and ad hoc reports.
Collaborates with department managers planning efforts surrounding annual operating budget plan.	Recommend and devise planning efforts surrounding annual operating budget plan.	Direct and advise planning efforts surrounding annual operating budget plan.
Prepare budgets, budget review procedures and financial reports; oversee reconciliation process.	Plan and prepare moderately complex budgets; budgetary procedures and financial reports.	Plan and prepare complex budgets; budgetary procedures and financial reports.
Prepare reports of unit income and programs which may include indirect cost recoveries, tuition costing, and investment income.	Calculate and project rates such as indirect costs, fringe benefit, overhead, enterprise fees, etc.	Calculate, forecast and project rates such as indirect costs, fringe benefit, overhead etc.
	In partnership with department administrators develop models for needs such as long-range forecasting.	Develop and present models for long-range forecasting.
Identify alternatives for reconciling available financial resource limitations with management goals and objectives.	Identify alternatives and forecast outcomes for reconciling available financial resource limitations with management goals and objectives.	Identify and recommend alternatives and forecast outcomes for reconciling available financial resource limitations with management goals and objectives.
	Prepare and analyze financial reports and college/unit trends to support departmental management in achieving operating objectives.	Develop, analyze and communicate financial reporting and college/unit trends to support departmental and college/unit management in achieving operating objectives.
	Understand the business needs of individual programs as well as sources and uses of funding.	Understand sources and uses of funding, budget process, financial statement data, modeling tools and key financial ratios; provide interpretation of financial information.

<b>Financial Specialist II INDIVIDUAL CONTRIBUTOR</b>	<b>Financial Specialist III INDIVIDUAL CONTRIBUTOR</b>	<b>Financial Specialist IV INDIVIDUAL CONTRIBUTOR</b>
	May serve as sponsored funds liaison with University departments and external agencies related to grant proposals/awards, including budgets, forecasting and cost sharing while maintaining compliance.	May serve as sponsor fund authority with University departments and external agencies related to grant proposals/awards, including budgets of complex and varied funding, forecasting and cost sharing while ensuring compliance.
	Assist in preparing quarterly and annual financial statements.	Prepare quarterly and annual financial statements.
Assist with the interpretation of financial information.	Provide reports, charts and presentations in support of annual requests for financial information (provost annual report, board of trustee requests). Reports prepared may be used in support of executive decisions or strategy development.	Provide reports, charts and presentations in support of annual requests for financial information (provost annual report, board of trustee requests). Reports prepared may be used in support of executive decisions or strategy development.

## JOB FACTOR PROFILE TABLE

FACTOR PROFILE	10396 FINANCE SPECIALIST II, BAND E	10397 FINANCE SPECIALIST III, BAND F	10402 FINANCE SPECIALIST IV, BAND G
<b>MINIMUM EDUCATION AND EXPERIENCE EQUIVALENCY</b>	Associate's degree or equivalent; more than 2 years or equivalent but less than 4 years or equivalent of experience.	Bachelor's degree or equivalent; at least 3 years but less than 5 years of experience or equivalent.	Bachelor's degree or equivalent; at least 5 years but less than 7 years of experience or equivalent.
<b>IMPACT</b>	Moderate impact	Moderate impact	Moderate impact
<b>CONTACTS - INSIDE</b>	Assist other Cooperation of task completion	Provide guidance to others Coordinate activities	Provide guidance to others Coordinate activities
<b>CONTACTS - OUTSIDE</b>	Provide information that exists within pre-established documents or programs	Provide information that exists within pre-established documents or programs	Provide and/or receive guidance, advice or information that must be analyzed and developed by the position.
<b>CONTACTS - STUDENTS</b>	Limited contact	Limited contact	Occasional contact dealing with confidential matters

<b>FACTOR PROFILE</b>	<b>10396 FINANCE SPECIALIST II, BAND E</b>	<b>10397 FINANCE SPECIALIST III, BAND F</b>	<b>10402 FINANCE SPECIALIST IV, BAND G</b>
<b>SUPERVISION</b>	Provide occasional guidance on work methods or procedures	Responsible for providing guidance, counsel and information to employees throughout the University in specific support areas	Responsible for providing guidance, counsel and information to employees throughout the University in specific support areas.
<b>COMPLEXITY</b>	Frequently adapt, combine, or make improvements to services, products, processes or programs. Work requires reasoning skills and judgment.	Frequently adapt, combine, or make improvements to services, products, processes or programs. Work requires reasoning skills and judgment.	Occasional required to develop new, imaginative or innovative solutions, services, products, processes or programs. Work requires sophisticated reasoning skills.
<b>LEVEL OF DECISION MAKING</b>	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>	Directly affect multiple functional areas Limited effect on students and employees	Directly affect an entire department Moderate effect on students and employees	Directly affect several departments within a college, school or administrative unit. Significant effect on students or employees
<b>FREEDOM OF ACTION</b>	General supervision Some interpretation of established policies and procedures required	General supervision Some interpretation of established policies and procedures required	General supervision Some interpretation of established policies and procedures required
<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