

FINANCIAL ANALYST COMPETENCY FRAMEWORK

Category	Core Competency	Core Competency Secondary	Definition
Personal Effectiveness and Individual Leadership	Inclusiveness	Diversity & Inclusion	Shows respect for people and their differences; promotes fairness and equity; engages the talents, experiences, and capabilities of others; fosters a sense of belonging; works to understand the perspectives of others; creates opportunities for access and success.
	Stewardship	Integrity and Ethics	Demonstrates integrity, accountability and efficient stewardship of University resources in a manner consistent with UC policies including the UC Standards of Ethical Conduct and safety policies.
	Problem Solving/Decision Making	Initiative / Problem Solving	Problem Solving - Anticipates and identifies problems; involves others in seeking innovative, simple solutions; conducts appropriate analyses; searches for best solutions that have benefit within and/or outside the organization; responds quickly to new challenges; takes thoughtful risks that are well balanced.
		Creativity / Innovation	Decision Making - Makes clear, consistent, transparent decisions; acts with integrity in all decision making; distinguishes relevant from irrelevant information and makes timely decisions; considers impact of decisions on University community.
	Strategic Planning & Organizing	Vision / Influence	Understands big picture and aligns priorities with broader goals, measures outcomes, uses feedback to change as needed, evaluates alternatives, solutions oriented, seeks alternatives and broad input; can see connections within complex issues; demonstrates ability to identify strengths and weaknesses of their organization as well as their external opportunities and threats.
		Strategic Thinking / Goal Setting	
	Communication	Communication	Connects with peers, subordinates and customers; actively listens; clearly and effectively shares information; demonstrates effective oral and written communication skills; seeks input from others; adapts communication to diverse audiences.
	Quality Improvement	Learning & Development	Strives for efficient, effective, high quality performance in self and the unit; delivers timely and accurate results; resilient when responding to situations that are not going well; takes initiative to make improvement; enhances skills by proactively participating in professional development and learning opportunities; able to learn from constructive feedback and mistakes.
	Leadership	Integrity and Ethics	Accepts responsibility for own work; develops trust and credibility; demonstrates honest and ethical behavior; handles stress and high demand situations; demonstrates tolerance and adaptability when dealing with ambiguous situations; models University and unit principles and culture; recognizes need for change and effectively manages areas that remain stable and those that are changing; effectively plans for change and deals with setbacks by being resilient and flexible; communicates frequently and authentically during times of change.
		Emotional Control	
		Change Management	
	Teamwork	Relationship Building Skills	Cooperates and collaborates with colleagues as appropriate; works in partnership with others; cultivates, builds and maintains good relationships with peers, subordinates and customers; delivers on commitments to team/organization.
		Dependability & Reliability	
	Service Focus	Customer Service	Values the importance of delivering high quality, innovative service to internal and external clients; understands the needs of the client; customer service focus; responds promptly to customer and is accessible to them; follows through on customer commitments in a timely manner; maintains positive, long-term working relationships with customers; assumes ownership of process issues and takes appropriate steps to mitigate problems.
Management	Strategic Focus	N/A	Sets the vision and defines the strategy.
	Operational Focus	N/A	Drives team performance.
	Employee Focus	N/A	Drives individual performance.
	Workplace Focus	N/A	Ensures a positive working environment.
FP&A Technical / Functional Skills	Project Management	Quality Improvement	Project management, business process improvement.
	Technical Skills	Finance Field Related	Relational databases, spreadsheets, presentation software, enterprise financial systems, software query tools.
	Financial Theory	Finance Field Related	Understands business principles and language including the fundamentals of finance, accounting (GAAP and fund accounting) and planning and budgeting (FP&A); ensures compliance with internal and external policies and regulations; understands the financial implications of decisions before execution; establishes clear priorities and provide financial insight to enable the University to make sound business decisions; takes the initiative to ensure that skills are current; consistently exhibits the ability to learn and apply new skills.
	Analytical Skills	Finance Field Related	Analytical thinking, financial management skills, problem solving and decision making, cost management, planning/forecasting/budgeting (practice), variance analysis, benchmarking, risk identification and assessment, financial modeling.
	Functional Finance Communication (Listening, Speaking, Writing, Visualization)	Finance Field Related	Active listening for comprehension with all financial stakeholders for accurate understanding; clear and concise speaking ability regarding financial concepts and systems with multiple audience types; clear and concise written communication of financial concepts to multiple audience types; ability to logically persuade stakeholders of best practice or method of conducting business; high level comprehension skills regarding fiscal policy, process, procedure and systems communications; ability to translate concrete, abstract or hypothetical financial concepts/projections into a visual format in multiple applications.
Work/Education Experience	Required Level of Experience / Education	N/A	Includes required educational and work experience by job level.

Core Competencies for Personal Effectiveness and Individual Leadership					
		Job Level			
Definition	Key Skills	FA 2	FA 3	FA 4 / Sup 2	FA 5 / Mgr 1
Inclusiveness	- Shows respect for people and their differences; works to understand the perspectives of others; supports opportunities to experience diversity on campus - Demonstrates integrity, accountability and efficient stewardship of University resources in a manner consistent with UC policies including the UC Standards of Ethical Conduct and safety policies - Actively listens; clearly and effectively shares information; demonstrates effective oral and written communication skills; seeks input from others - Delivers timely and accurate results - Takes initiative to make improvement; able to learn from constructive feedback and mistakes - Enhances skills by proactively participating in professional development and learning opportunities - Accepts responsibility for own work - Demonstrates honest and ethical behavior; models University and unit principles and culture - Cooperates and collaborates with colleagues as appropriate; works in partnership with others; delivers on commitments to the team/organization - Values the importance of delivering high quality, innovative service to internal and external clients; customer service focus; responds promptly to customer and is accessible to them; follows through on customer commitments in a timely manner	✓	✓	✓	✓
Stewardship & managing resources					
Problem solving					
Decision making					
Strategic planning and organizing	- Models and maintains the values of openness and inclusiveness - Connects with peers, subordinates and customers; adapts communication to diverse audiences - Responds quickly to new challenges - Makes clear, consistent, transparent decisions; acts with integrity in all decision making; distinguishes relevant from irrelevant information and makes timely decisions - Sees connections within complex issues; utilizes diverse perspectives to broaden the scope of problem-solving - Resilient when responding to situations that are not going well - Handles stress and high demand situations; demonstrates tolerance and adaptability when dealing with ambiguous situations - Develops trust and credibility - Cultivates, builds and maintains good relationships with peers, subordinates and customers - Understands the needs of the client; maintains positive, long-term working relationships with customers; addresses customer problems in a professional manner; personally follows through to ensure issues are resolved to meet the client's expectations - Takes responsibility for failures as well as successes - Resolves conflicts in a timely and constructive manner; exercises sound judgment and escalates issues as appropriate to management		✓	✓	✓
Communication					
Quality Improvement					
Leadership					
Teamwork	- Promotes fairness and equity; engages the talents, experiences, and capabilities of others; fosters a sense of belonging; Creates opportunities for access and success; encourages and initiates collaboration - Anticipates and identifies problems; involves others in seeking innovative, simple solutions; conducts appropriate analyses; searches for best solutions that have benefit within and/or outside the organization - Takes thoughtful risks that are well balanced - Understands big picture and aligns priorities with broader goals, measures outcomes, uses feedback to change as needed, evaluates alternatives, solutions oriented, seeks alternatives and broad input; understands culture of department/division/campus; considers impact of decisions on University community - Strives for efficient, effective, high quality performance in self and the unit - Recognizes need for change and effectively manages areas that remain stable and those that are changing; effectively plans for change and deals with setbacks by being resilient and flexible; communicates frequently and authentically during times of change - Assumes ownership of process issues and takes appropriate steps to mitigate problems - Breaks down hidden agendas to resolve underlying issues; demonstrates balanced perspective in polarized situations - Provides sound guidance on controversial issues - Coaches others on appropriate workplace behavior - Leads by example - Encourages independent thinking / problem solving - Provides opportunities for learning and development for others - Creates a shared responsibility among team members by involving them in critical deliberations and decisions as appropriate - Demonstrates ability to identify strengths and weaknesses of organization as well as external opportunities and threats			✓	✓
Service focus					
	- Exercises significant influence in creating vision for the department/division and establishes strategic plans with material impact - Builds working and collegial relationships at all organizational levels, and leverages those relationships to ensure best outcomes for the unit/organization - Communicates strategic context, vision, goals in a highly effective manner that moves the organization forward - Takes responsibility for mitigating strategic and operational risks - Ensures that full and unbiased information is used to make informed decisions - Motivates others by setting a direction and allowing others to participate in achieving an aligned vision - Identifies potential opportunities for the unit and engages with senior unit leadership to realize these opportunities - Recognizes when work processes are negatively impacting the customer; assumes ownership of the issue and takes the appropriate steps to review processes to help eliminate problems				✓

Key Skills indicate the minimum knowledge and ability at each job level and are inclusive and cumulative through the job levels.

FINANCIAL ANALYST COMPETENCY FRAMEWORK

Competency: Management Skills				
		Job Level		
Definition	Key Skills	Lead	Supervisor	Manager
Strategic Focus (Sets the vision and defines the strategy)	• Develops and uses organizational acumen	✓	✓	✓
	• Sets strategy and direction			✓
	• Creates organizational structure			✓
	• Develops financial and resource plans			✓
	• Influences, communicates and presents effectively	✓	✓	✓
	• Makes timely and ethical supervision decisions		✓	✓
	• Manages change	✓	✓	✓
	• Develops organizational readiness			✓
Operational Focus (Drives team performance)	• Aligns team plans with organization vision and leadership strategies		✓	✓
	• Defines and delegates work		✓	✓
	• Sets team goals & quality / customer service standards		✓	✓
	• Organizes and facilitates meetings	✓	✓	✓
	• Builds detailed operational plans		✓	✓
	• Develops metrics, team systems, and processes for continuous improvement		✓	✓
	• Assesses team success and addresses problems		✓	✓
	• Manages budget and resources		✓	✓
	• Resolves conflict	✓	✓	✓
	• Builds collaboration	✓	✓	✓
Employee Focus (Drives individual performance)	• Defines position roles and requirements			✓
	• Supports development of a diverse workforce	✓	✓	✓
	• Sets expectations and individual performance goals		✓	✓
	• Engages and develops employees		✓	✓
	• Conducts performance reviews		✓	✓
	• Motivates, recognizes, and rewards employees		✓	✓
Workplace Focus (Ensures a positive working environment)	• Develops a high-performance culture	✓	✓	✓
	• Ensures an inclusive workplace	✓	✓	✓
	• Ensures a safe workplace	✓	✓	✓
	• Ensures compliance with all legal, contractual and UC Policy requirements		✓	✓

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FINANCIAL ANALYST COMPETENCY FRAMEWORK

Competency: FP&A Project Management						
		Job Level				
Definition	Key Skills	FA 2	FA 3	FA 4 / Sup 2	FA 5 / Mgr 1	Mgr 2 & 3
Project Management Business Process Improvement	- Participate as a member of a project team - Support new initiatives: cooperate and adapt to changes and processes. - Participate in change management strategy through communication and collaboration with others - Contribute to development and maintenance of desktop procedures and process documentation for area of responsibility	✓	✓	✓	✓	✓
	- Make decisions determining approach to managing and completing processes and process improvements - Develop basic test scenarios, perform testing, and analyze and summarize results - May serve as subject matter expert on existing systems and processes on a project team		✓	✓	✓	✓
	- Lead or contribute to cross functional teams - Engage in continuous critical analysis of existing systems - Make recommendations to achieve greater efficiencies and improve internal controls - Define requirements and ensure consistent implementation of systems and processes at unit level			✓	✓	✓
	- Act as business owner of a project - Develop and implement initiatives with significant financial impact - Analyze problems in business systems and processes and identify risks, solutions and strategies - Lead complex, high-visibility process redesign and innovation projects; develop, implement, and participate in major initiatives				✓	✓
	- Lead and direct projects requiring functional integration across the organization - Identify risks and mitigation strategies - Determine costs of business activity for project initiatives - Identify need for new systems and develop and present proposals					✓

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Competency: FP&A Technical Skills						
		Job Level				
Definition	Key Skills	FA 2	FA 3	FA 4 / Sup 2	FA 5 / Mgr 1	Mgr 2 & 3
Relational databases Spreadsheets Presentation software Enterprise financial systems Software query tools	• Basic familiarity with Microsoft Office suite, especially Excel • Basic familiarity with UCB financial systems (such as journal entries, data look up), including BFS/BAIRS, HCM, etc. • Internet and computer literacy • Proficiency in business applications, such as Microsoft Office suite, especially Excel • Basic familiarity with reporting and query tools	✓	✓	✓	✓	✓
	• Advanced proficiency in business applications, such as Microsoft Office suite, especially Excel (such as pivots, lookups, nested formulas) • Advanced proficiency with cross-functional enterprise financial systems and interdependencies • Advanced proficiency with query and reporting tools • Intermediate knowledge of software features such as Smartview • Intermediate to advanced knowledge of presentation and project management software or tools • Likely act as a subject matter expert for unit in certain advanced features of Excel, use of enterprise financial systems, or query and reporting tools		✓	✓	✓	✓
	• Advanced to expert proficiency with cross-functional enterprise financial systems and interdependencies • Advanced knowledge of software features such as Smartview • Advanced knowledge of presentation and project management software or tools • May act as a subject matter expert for unit in certain advanced features of Excel, use of enterprise financial systems, or query and reporting tools			✓	✓	✓
	• Advanced or expert knowledge of business applications, such as Microsoft Office suite, especially Excel • Advanced to expert knowledge of cross-functional enterprise financial systems and interdependencies				✓	✓
	• User knowledge of business applications, such as Microsoft Office suite, especially Excel • Intermediate to advanced knowledge of cross-functional enterprise financial systems and interdependencies					✓

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FINANCIAL ANALYST COMPETENCY FRAMEWORK

Competency: FP&A Financial Theory

Definition	Key Skills	Job Level				
		FA 2	FA 3	FA 4 / Sup 2	FA 5 / Mgr 1	Mgr 2 & 3
• Understand business principles and language including the fundamentals of finance, accounting (GAAP and fund accounting) and planning and budgeting (FP&A) • Ensure compliance with internal and external policies and regulations • Understand the financial implications of decisions before execution • Establish clear priorities and provide financial insight to enable the University to make sound business decisions • Take the initiative to ensure that skills are current • Consistently exhibit the ability to learn and apply new skills	• Understands basic accounting procedures like journal entry creation (including preparation of supporting documentation) and review and running basic reports • Understands basic accounting principles like debits/credits • Understands the different components of the Chart of Accounts (COA) • Understands basic accounting principles and concepts like accounting method, time period and matching and is able to apply them • Understands the different components and interdependencies of the Chart of Accounts (COA) • Understands the components of financial statements/reports • Able to interpret internal and external policies and regulations	✓	✓	✓	✓	✓
	• Knowledge of GAAP • Understands basic budgeting and planning concepts (trends and Capital and Operational Budgets) • Identifies and resolves complex accounting/finance issues • Provides limited local or unit oversight of the use of the COA • Understands the components and interdependencies of financial statements/reports including basic statistical relationships; examples include financial statement ratios, Key Performance Indicators (KPIs) and Compounded Annual Growth Rate (CAGR) • Suggest policy changes or develop new ones to ensure compliance with external regulations and changes in finance and accounting theories		✓	✓	✓	✓
	• Identifies and resolves complex accounting/finance issues associated with unusual or complex transactions • Understands and applies advanced accounting and finance knowledge; advises budget owners and financial managers and makes recommendations to leadership on complex financial issues • Understands statistical relationships of financial data • Understands financial concepts like risk and return and is able to evaluate/identify trade-offs • Routinely discusses and evaluates the appropriate use of the COA • Researches new regulations/policies and implements approved policies or changes needed to ensure compliance; understands the interrelationships of financial processes, regulations/policies and procedures • Recommends initiatives with significant financial impact			✓	✓	✓
	• Understands, identifies and resolves complex financial issues within their division • Reviews and approves appropriate treatment for accounting/finance issues associated with unusual or complex transactions • Effective knowledge of financial analysis and forecasting methodologies, economic theory, and statistics to support financial decision-making • Provides control function with regard to new value creation and inactivation of COA elements • Develops, recommends and implements new regulations/policies or changes				✓	✓
	• Advanced understanding of financial principles and concepts; demonstrated ability to interpret and apply financial principles and concepts based on the strategy and operating principles of the University • Understands, identifies and resolves complex financial issues which may span across multiple functions; understands a broad spectrum of subjects, policies and procedure that may have a financial impact on the University • Knowledgeable and fluent in internal and external policies & regulations					✓

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Competency: FP&A Analytical Skills						
		Job Level				
Definition	Key Skills	FA 2	FA 3	FA 4 / Sup 2	FA 5 / Mgr 1	Mgr 2 & 3
Analytical thinking about financial processes	• Able to manipulate data in Excel; able to identify arithmetical mistakes • Maintain, reconcile, review, combine and validate moderately complex financial data sets • Identify, clarify and investigate discrepancies and exceptions • Resolve transactional inquiries, escalate broader issues • Perform preliminary analysis • Run and analyze standard financial reports, often from multiple systems • Understand, apply and ensure compliance with internal policies and external regulations • Design and perform ad-hoc analyses, incorporating checks and balances to ensure data integrity • Construct and assemble data for budgeting, forecasting and decision making • Identify and resolve complex issues that may span multiple areas • Execute internal control programs and recommend and implement changes	✓	✓	✓	✓	✓
Financial management skills						
Problem solving and decision making						
Cost management						
Planning, forecasting, and budgeting						
Financial Analysis	• Develop conclusions, and present high level summary of recommendations • Develop reports and presentations of complex financial data and metrics for management • Own complex budget and forecasting scenarios and long-range planning • Run and analyze moderately complex financial reports, often from multiple systems • Perform research and synthesize data • Identify and understand trends in data, draw conclusions, develop solutions, present and implement recommendations, and create follow up analysis • Interpolate results from large amounts of data, perform root cause analysis and propose solutions, and design and run ad hoc reports • Provide consulting advice to client group(s); serve as a resource on matters that require technical , financial, or subject matter expertise		✓	✓	✓	✓
Variance Analysis						
Benchmarking						
Risk Identification and assessment						
Financial Modeling						
	• Provide specialized expertise requiring technical finance knowledge to perform complex, technical finance functions, ranging from maintaining complex data models to developing, assessing and improving internal control and subject area systems • Develop complex modeling, and conduct analyses utilizing judgment • Identify and resolve unique issues with substantial significance; recognize exceptions, and conduct in-depth analysis using advanced technical knowledge and experience • Deliver high quality services and reports to support the stewardship of university resources • Make recommendations to leadership based on synthesis of financial data; provide cost analyses and plan studies; determine costs of business activity • Assess client and business needs, and formulate recommendations to determine approach to managing and completing processes; lead and execute unit or cross functional projects. Ensure effective and efficient delivery and integration of all administrative services for area of responsibility			✓	✓	✓
	• Apply advanced, expert, technical knowledge and expertise to proactively prioritize, identify, and resolve strategic and finance issues typically spanning multiple areas • Act as a lead or technical expert, and provide analytical guidance, direction and training to less experienced finance staff • Make strategic decisions using complex, comprehensive analyses, high level financial modeling; provide information and context to leadership to support senior leadership decisions • Provide strategy, vision and direction that have wide scope and impact, make recommendations, influence issues related to university finance and accounting policy based on complex analyses					✓

Key Skills indicate the minimum knowledge and ability at each job level and are inclusive and cumulative through the job levels.

Competency: FP&A Communication Skills as Functionally Applied to Finance						
		Job Level				
Definition	Key Skills	FA 2	FA 3	FA 4 / Sup 2	FA 5 / Mgr 1	Mgr 2 & 3
Active Listening with all stakeholders Accuracy and checking understanding of what is being communicated Persuasion skills Demonstrates engagement and respect Clear and concise written and verbal communication Effectively gathers information Effective writing skills Excellent reading comprehension	• Accuracy in listening to financial concepts through restatement • Verbally follow up to clarify understanding of finance concepts • Use non-verbal communication to demonstrate listening and engagement one-on-one or in small group settings • Clear and concise communication of common financial reports in one-on-one situations, small groups, via email and phone • Actively engages with colleagues to further understanding of financial reports and systems • Demonstrate understanding of written finance communication • Able to write short, concise explanations of standard financial reports • Can explain common finance terminology/jargon/acronyms • Ability to explain standard reports from UCB systems (BAIRS, Cal Planning, Bear Buy) to non-financial audiences in order to provide information to units supported • Internalize understanding of what is heard • Ask clarifying questions to expand understanding of what is heard • Comfortable, clear & concise communication of typical financial reports/basic policy/systems in one-on-one situations, small groups, via email and phone • Able to write short to mid-length (multiple paragraphs), concise explanation of financial reports/policies/procedures • Ability to generate standard financial reports and export to various formats (Excel, PDF, HTML) in order to best illustrate a point or provide specific financial information • Beginner level ability of standard spreadsheets (Excel) to present financial information effectively to both financial and non-financial colleagues • Provides verbal explanation of common jargon or acronyms used in relation to financial systems/policy/reporting • Actively seeks to further understanding of financial reports and systems & shares information clearly and freely	✓	✓	✓	✓	✓
Applies logical ordering Translates financial concepts into visual formats Motivates and encourages the participation of others	• Accurately restate the message in one's own words while integrating additional concepts that further a discussion • Presents clearly and comfortably on systems/policy/reporting of finance to any members of a unit • Is the generalist/baseline source of knowledge of finance in a unit • Actively shares/explains/provides support re: understanding of financial reports/policy/systems & seeks improved understanding • Advocates logically and rationally for specific financial action • Demonstrated comprehension of detailed finance communication • Writing of mid-length or longer (full page), concise communication to explain non-standard reports/policy/system/procedure in UCB finance • Provide concise captioning of financial presentations • Ability to generate standard and non-standard financial reports and export to various formats for use in various formats to best illustrate a point or provide specific or general financial information • Low-intermediate level ability of spreadsheets (Excel) to present financial information with formatting skills that add to the use of spreadsheets as a communication tool • Beginner level ability of presentation software (PowerPoint, Visio, etc.) in order to create visualization of standard financial data		✓	✓	✓	✓

Competency: FP&A Communication Skills as Functionally Applied to Finance						
Definition	Key Skills	Job Level				
		FA 2	FA 3	FA 4 / Sup 2	FA 5 / Mgr 1	Mgr 2 & 3
	• Presents, guides & trains on systems/policy/reporting of finance to any members of a unit from the concrete to the abstract • Is the specialist/experienced source of knowledge of finance in a unit • Encourages participation, interaction and improved understanding of finance from all colleagues and consistently demonstrates such behavior for others • Gathers and integrates various sources of financial information on complex topics requiring understanding of multiple policies, procedures or systems and presents findings in a clear and concise manner • Demonstrated comprehension of complex finance communication • Writing of complex or multi-page narratives, summaries, communication as in support or explanation of various financial systems / policies / procedures • Can provide captioning and explanation to complex finance presentations • Ability to generate custom financial reports in various UCB systems and export to the format that most appropriately fits the need of a unit • Low-intermediate ability in the use of spreadsheets (Excel) including the ability to generate basic visual images with the data present in Excel sheets (graphs/charts) • Low-intermediate ability in the use of presentations software including designing and developing a presentation from beginning to end • Engage with multiple audiences in an active manner • Synthesize ideas from multiple sources related to the same or similar concepts • Clarify and summarize what is heard on an ad-hoc and ongoing basis • Demonstrates excellent listening skills for others			✓	✓	✓
	• Strong presenter and trainer on finance systems/policy/reporting • Communicates short and long term financial goals to a team and individuals • Consistently motivates and provides direction to a finance team • Initiates and guides difficult finance conversations • Able to explain finance policy/procedure/systems in an ad hoc manner • Demonstrated synthesis of multiple complex finance communications re: policy/procedure/systems • Writing of synthesized, high-level summaries of financial concepts • Ability to go "behind the dashboard" in financial reporting systems to generate highly customized reporting and export in multiple formats to best suit the business need • Intermediate level ability in the use of spreadsheets (Excel) and presentation software to best create custom visualizations and organize and manage data • Able to listen to multiple perspectives and constituencies and encourage diverse/divergent/opposing perspective and points of view • Objectively listens and recognizes when concepts are affected by inherent biases and perspectives and can plainly state when such is occurring • Exemplifies listening skills, models them for others				✓	✓
	• Expert presenter and communicator to sr. leadership and external audiences • Exemplifies excellent communication of financial concepts to multiple audiences • Exemplifies respect for ideas and insights of others and actively draws various constituencies in and seeks opportunities to solicit challenging or differing perspectives , particularly under times of external/internal stress or dissonance • Excellent demonstrated comprehension and writing abilities re: finance at UCB with synthesis and evaluation of multiple sources of input • Production of high-level visioning and goal statements that appropriately cascade to different levels • Seeks opportunities to listen to the perspectives and input of others with challenging or differing perspectives • Encourages others to improve listening skills through demonstrated exemplary behaviors with multiple audiences, particularly under times of external/internal stress or dissonance • Ability to synthesize multiple data sets from disparate sources and integrate visually to meet the financial needs of the whole or large portions of the university • Hi-intermediate level ability in the use of spreadsheets and presentation software for the use of creating visualization of complex financial concepts					✓

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Work/Educational Experience						
		Job Level				
Definition	Key Skills	FA 2	FA 3	FA 4 / Sup 2	FA 5 / Mgr 1	Mgr 2 & 3
Required level of experience / education	• AA degree and/or 2 years financial related experience	✓				
	• Bachelor's degree in accounting, business, economics or related field and/or minimum of 2 years financial related experience in a multidivisional organization <u>or</u> similar combination of work and experience		✓			
	• Bachelor's degree in accounting, business, economics or related field and/or minimum of 5 years financial related experience in a multidivisional organization <u>or</u> similar combination of work and experience			✓		
	• Bachelor's degree in accounting, business, economics or related field and/or minimum of 6 years financial related experience in a multidivisional organization interacting with customers and leadership <u>or</u> similar combination of work and experience. Mgr 1 requires management experience				✓	
	• MBA, CPA or certification in specialized field preferred					
	• Bachelor's degree in accounting, business, economics or related field and/or minimum of 10 years financial related experience in a multidivisional organization interacting with customers and leadership <u>or</u> similar combination of work and experience. Requires significant management experience .					✓
	• MBA, CPA or certification in specialized field preferred					