



UNIVERSITY OF NORTH CAROLINA WILMINGTON

Budget Manager
Competency Profile

DESCRIPTION OF WORK:

Positions assigned to this banded class serve as the highest technical experts in organizations in the preparation, development, and administration of the agency budget and contribution to the development of the budget. These roles provide program direction, consultancy, problem resolution, and staff administration. Managers are required to have diverse knowledge and understanding of a variety of programs represented by the agencies and ability to build effective working relationships with department heads and government officials. These positions must be able to respond to requests of the Governor and /or the General Assembly in an efficient manner.

ROLE DESCRIPTIONS BY COMPETENCY LEVEL		
Contributing	Journey	Advanced
<p>Employees at this level are expected to demonstrate elevated proficiency in the practices, policies, regulations and laws related to budget development and execution. Employees may have supervisory responsibilities for a small professional staff and/or technical staff. There is frequent interaction with agency heads, Office of State Budget and Management, and legislative analysts.</p>	<p>Employees at this level are expected to demonstrate superior proficiency in the practices, policies, regulations and laws related to budget development and execution. Employees have supervisory responsibilities for a professional staff and/or technical staff. Responsibilities often include the oversight of agency budget operations, the review of staff work the development and implementation of new policies and/or procedures, and decision-making authority and problem-solving for unusual situations. Interactions occur with elected officials and legislative committees. Employees must be prepared to present information to the legislature.</p>	<p>Employees at this level are expected to demonstrate mastery in the practices, policies, regulations, and laws related to budget development and execution. Employees have supervisory responsibilities for a professional and technical staff. Responsibilities often include the oversight of agency budget operations, the review of staff work, the development and implementation of new policies and/or procedures, and decision making authority and problem solving for unique situations that will have large-scale impact on agencies and business practices. Interaction occurs frequently with elected officials and legislative committees. Employees at this level often present information to the legislature and other executive entities as needed.</p>

Competencies	Definition
Professional Knowledge	Considerable knowledge of professional fiscal theory, techniques, practices and procedures. Considerable knowledge of the fiscal area of assignment and skills in applying this knowledge in a review. General knowledge of state and federal rules and regulations governing the fiscal program. General knowledge of agency/university practices, procedures and principles.
Program Supervision & Administration	Ability to establish expectations and clear direction to meet goals and objectives. Ability to motivate and engage employees through effective communication. Knowledge of appropriate policies and procedures for recruiting, selecting, developing, counseling, disciplining and evaluating performance of employees to retain a diverse workforce. Ability to administer and ensure compliance with human resources policies and procedures. Ability to observe and assess work. Ability to provide feedback. Ability to provide technical supervision of staff. Ability to develop plans for employees to gain necessary knowledge, skills, and abilities to successfully perform their duties. Ability to plan for and support employees in career development opportunities. Ability to assign work and to establish work rules and acceptable levels of quality and quantity of work. Ability to review work and evaluate performance of others and to develop individuals' competencies.
Critical Thinking	Critical thinking includes questioning, analysis, synthesis, interpretation, inference, inductive and deductive reasoning, intuition, application and creativity. Ability to assess and interpret work. Ability to develop, evaluate, implement and modify work. Ability to make accurate decisions.
Change Management	Ability to plan and implement change initiatives. Ability to support innovation and creativity by encouraging staff to accept and resolve challenges. Ability to remain flexible to meet constantly changing and sometimes opposing demands.
Communication	Ability to present information effectively in a manner suited to the characteristics and needs of the audience. Ability to convey information clearly and concisely either verbally or in writing to ensure that the intended audience understands the information and the message. Ability to listen and respond appropriately to others.

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

Competency	Contributing	Journey	Advanced
<p>Professional Knowledge - Considerable knowledge of professional fiscal theory, techniques, practices and procedures. Considerable knowledge of the fiscal area of assignment and skills in applying this knowledge in a review. General knowledge of state and federal rules and regulations governing the fiscal program. General knowledge of agency/university practices, procedures and principles.</p>	<p>Considerable knowledge of professional fiscal theory, techniques, practices and procedures, and may require knowledge of generally accepted accounting principles and skills in applying this knowledge. Apply considerable knowledge of local, state and federal regulations and statutes governing the area of work. Apply technologies and knowledge of applicable information technology and internal controls to meet work needs. Basic knowledge of supervisory practices and skill in supervising others, including communication skills, how to delegate and assign duties, how to deal effectively with difficult employees, how to evaluate performance and to participate in disciplinary actions. Basic knowledge of state government’s human resources interview policies and procedures.</p>	<p>Full knowledge of professional fiscal theory, techniques, practices and procedures and may require knowledge of generally accepted accounting principles and skills in applying this knowledge. Apply full knowledge of local, state and federal regulations and statutes governing the area of work. Independently use applicable information technology to perform. Ensure integrity of information systems, internal controls and data including recommending modifications as required. Apply updated information technology to facilitate program goals and program procedures. Considerable knowledge of supervisory practices and skill in supervising others including communication skills, how to delegate and assign work, how to deal effectively with difficult employees, how to evaluate performance and may assist or conduct investigations and participate in disciplinary actions. Working knowledge of state government’s human resources policies and procedures. Basic knowledge of strategic planning methodologies and practices.</p>	<p>Extensive knowledge of professional fiscal theory, techniques, practices and procedures and may require knowledge of generally accepted accounting principles and skills in applying this knowledge. Apply extensive knowledge of local, state and federal regulations and statutes governing the area of work. Assess and apply thorough knowledge of the reliability of systems and internal controls; identify problems and changing requirements. May research and recommend changes to software. Extensive knowledge of supervisory practices and skill in supervising others including communication skills, how to delegate and assign work, how to deal effectively with difficult employees, how to evaluate performance and to conduct investigations and participate in disciplinary actions. Ability to mentor new supervisors. Full knowledge of state government’s human resources policies and procedures. Considerable knowledge of strategic planning methodologies and practices.</p>

Competency	Contributing	Journey	Advanced
<p>Program Supervision & Administration - Ability to establish expectations and clear direction to meet goals and objectives. Ability to motivate and engage employees through effective communication. Knowledge of appropriate policies and procedures for recruiting, selecting, developing, counseling, disciplining and evaluating performance of employees to retain a diverse workforce. Ability to administer and ensure compliance with human resources policies and procedures. Ability to observe and assess work. Ability to provide feedback. Ability to provide technical supervision of staff. Ability to develop plans for employees to gain necessary knowledge, skills, and abilities to successfully perform their duties. Ability to plan for and support employees in career development opportunities. Ability to assign work and to establish work rules and acceptable levels of quality and quantity of work. Ability to review work and evaluate performance of others and to develop individuals' competencies.</p>	<p>Assess employee competencies and conduct/participate in performance management reviews. Coaches and mentors staff. Plan and assign work tasks. Motivate employees and develop team commitment toward meeting the operational goals and objectives. Identify and address quality of work and performance improvement issues for the unit. Review work and written reports to ensure compliance with standards and requirements and to guide staff in providing appropriate documentation to support conclusions. May conduct and prepare work and written reports.</p>	<p>Coach and facilitate the enhancement of employee competencies as appropriate to the needs of the work unit. Manage resources effectively to provide for employee training and growth and to meet the operational goals and objectives. Addresses quality monitoring and performance improvement issues for the program or area of responsibility. Reviews and approves work findings /written reports of moderate complexity. Ensure that fiscal rules and regulations are interpreted correctly.</p>	<p>Mentor, coach and manage the total competencies of staff in multiple organizational units or region. Seek sources and opportunities for employee training and growth. Direct the management of program and staff resources. Involve employees in strategic planning and implementation and in the development of policies and procedures. Identify and address quality monitoring and performance improvement issues for fiscal services for the program or area of responsibility for multiple units or region. Ensure that fiscal rules and regulations are interpreted correctly internal and external to the organization.</p>

Competency	Contributing	Journey	Advanced
<p>Critical Thinking - Critical thinking includes questioning, analysis, synthesis, interpretation, inference, inductive and deductive reasoning, intuition, application and creativity. Ability to assess and interpret work. Ability to develop, evaluate, implement and modify work. Ability to make accurate decisions.</p>	<p>Makes determinations based on facts. Identifies problems, reports potential problems, and assesses options. Interprets delivery of service and compliance with local, state and federal regulations and standards. Identify risk impact on program policy and procedure issues.</p>	<p>Analyzes moderately complex situations. Recommends solutions and options; alerts leadership to impact on program. Recommends response to a moderately complex situation based on interpretation of local state and federal regulations and standards. Recommends modifications to program policy and procedures to minimize risk.</p>	<p>Manages complex work situations. Anticipates and remains alert to potentially problematic situations. Resolves unusual problems. Implements response to a situation based on interpretation of local state and federal regulations and standards. Ensures implementation of program policy and procedure changes.</p>
Competency	Contributing	Journey	Advanced
<p>Change Management - Ability to plan and implement change initiatives. Ability to support innovation and creativity by encouraging staff to accept and resolve challenges. Ability to remain flexible to meet constantly changing and sometimes opposing demands.</p>	<p>Understand change management strategies and principles. Communicate and implement new policies and procedures.</p>	<p>Lead the transition from old to new programs at the unit level. Participate in the development and implementation of goals and objectives.</p>	<p>Lead the development and implementation of vision and mission statements. Lead and direct the development and implementation of goals and objectives.</p>

Competency	Contributing	Journey	Advanced
<p>Communication - Ability to present information effectively in a manner suited to the characteristics and needs of the audience. Ability to convey information clearly and concisely either verbally or in writing to ensure that the intended audience understands the information and the message. Ability to listen and respond appropriately to others.</p>	<p>Communicate with individual work units or entire organization on fiscal/ program elements. Update existing communications. Disseminate information on changes in policies, procedures, and protocols. Prepare, organize and may review written reports according to documentation standards and requirements and guides staff in providing appropriate documentation to support conclusions. Acquire basic understanding of working relationships with fiscal co-workers and others in order to achieve work goals.</p>	<p>Communicate moderately complex fiscal/programmatic information outside of the organization. Interpret fiscal rules and regulations internal to the organization. Review and approve written reports, often of moderate complexity. Ensure that fiscal rules and regulations are interpreted correctly. Develop contacts and relationships with interested parties in achieving division/organizational goals.</p>	<p>Communicate major and/or complex situations and actions internal and external to the organization. Interpret rules and regulations internal and external to the organization and serve as a technical resource in developing response to the media. Document and report more complex or unique issues and effectively articulate written conclusions. Ensure that fiscal rules and regulations are interpreted correctly internal and external to the organization. Develop and maintain professional working relationships in complex and/or difficult situations in order to achieve organizational goals.</p>

Recommended Minimum Training Guideline: Graduation from a four-year college or university with a degree in Accounting, Business, Finance or a degree closely related to the area of assignment with twelve hours of accounting and three years of progressive accounting experience, one of which must have been supervisory in nature; 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 reflect essential functions per ADA. Examples of competencies are typical of the majority of positions, but may not be applicable to all positions.