

**Pro3 Series at UF**

**List of financial competencies and core personal excellence competencies**

This document represents the results of a comprehensive effort to identify the key competencies (knowledge, skills, abilities) required for success in “administrative professional” positions at the University of Florida. These key skills were identified primarily on the basis of a series of focus groups and interviews with employees in administrative positions who were identified as solid performers in those positions. This document represents the range of skills that became apparent as those successful in the positions described their work and how they fulfilled the positions’ demands.

Core competencies are shaded.

<b>Cluster</b>	<b>Competencies</b>	<b>Key Actions</b>	<b>Interventions</b>
<b>Financial Skills</b>	<b>Accounting—understands basic accounting principles as a foundation for managing financial activities in their work unit.</b>	<b>Can apply basic accounting principles such as debit, credit, accounts payable, and accounts receivable.</b>	<b>Basic Accounting Concepts for UF Fiscal Administrators</b>
	<b>Budget development—serves as resource for budget development, working in conjunction with higher-level administrators in their work unit (chair, dean, director, etc.).</b>	<b>Understands how UF budget is managed.</b>  <b>Understands and can apply related myUFL system requirements, including chartfields, ledger groups, etc.</b>  <b>Can forecast or project budget requirements (personnel, other) using Enterprise Reporting and Query Studio, and other tools as necessary.</b>	<b>Intro to Budget and KK</b>  <b>Departmental Reconciliations</b>  <b>Reporting: Basics</b>  <b>Reporting: Query Studio</b>  <b>How to Prepare a Grant Budget (DSR—RATS series)</b>

Cluster	Competencies	Key Actions	Interventions
	<p><b>Fund and spending knowledge—understands and can apply guidelines and restrictions associated with available funding, including grants, state appropriations, foundation, and overhead accounts.</b></p>	<p><b>Knows and can explain guidelines and restrictions for various funding sources; advises chair, faculty, and staff on appropriate use of funds, including Contracts and Grants guidelines (for specific grants, as well as, guidelines associated with OMB Circular A-21).</b></p> <p><b>Spends from appropriate sources in accordance with guidelines and restrictions.</b></p> <p><b>Identifies and corrects mistakes or discrepancies in use of funds.</b></p>	<p><b>The “Color of Money” at UF: A Guide to How Money may be Spent at UF</b></p> <p><b>Overview of Research Administration-Post Award (DSR—RATS series)</b></p> <p><b>The Regulatory Framework of Sponsored Research Administration (DSR—RATS series)</b></p> <p><b>Cost Sharing and CAS Compliance Workshop (DSR—RATS series)</b></p>
	<p><b>Completing transactions—can complete financial transactions in the myUFL subsystems of purchasing, travel/expense, accounts payable, and accounts receivable in keeping with UF policies and procedures.</b></p>	<p><b>Can purchase and pay for items and services using PeopleSoft, including PCard transactions.</b></p> <p><b>Can deposit funds as needed.</b></p> <p><b>Can complete travel and expense transactions for themselves and others in PeopleSoft.</b></p> <p><b>Safeguards department assets by using the appropriate UF subsystem. Has basic understanding of appropriate internal controls necessary, as well as, appropriate security roles that should be assigned.</b></p>	<p><b>Intro to Purchasing</b></p> <p><b>Purchasing Policy</b></p> <p><b>Paying Vendors</b></p> <p><b>Travel and Expense</b></p> <p><b>Travel Policy</b></p> <p><b>Making Deposits</b></p> <p><b>Asset Management</b></p> <p><b>PCard (Tutorial)</b></p> <p><b>E2E Instruction guide</b></p>

<b>Cluster</b>	<b>Competencies</b>	<b>Key Actions</b>	<b>Interventions</b>
	<b>Fiscal management—develops and maintains internal controls in the oversight of the budget, to include reconciliation; able to troubleshoot and work to solve problems that may emerge or be identified; able to facilitate audits.</b>	<p><b>Understands and can reconcile department ledgers in keeping with UF business requirements and best practices.</b></p> <p><b>Understands key control concepts and application of these to key business processes.</b></p> <p><b>Uses available tools and can create own tools (excel spreadsheets, etc.) as necessary to reconcile accounts and to do budgetary projections and analysis.</b></p> <p><b>Able to facilitate audit, knowing whom to contact in the event auditors show up.</b></p>	<p><b>Departmental Reconciliations</b></p> <p><b>Reporting: Basics</b></p> <p><b>Internal Controls at UF</b></p>
	<b>Spreadsheet software—can use Excel (or other spreadsheet software) as a tool for budget management with a high degree of proficiency.</b>	<b>Creates and manipulates spreadsheets, invoices, databases, and other tools using Excel (or other spreadsheet software).</b>	<b>Excel Basic, Excel Intermediate, Excel Advanced</b>
	<b>Numbers skills—Possesses a skill and comfort with numbers.</b>	<b>Works quickly and comfortably with numbers. “The numbers speak to me.”</b>	
<b>Personal Excellence core competencies</b>			
<b>Personal Excellence— Preventing and Solving Problems Skills</b>	<b>Analytical Thinking—able to tackle a problem by using a logical, systematic, sequential approach.</b>	<p><b>Notices discrepancies and inconsistencies in available information.</b></p> <p><b>Approaches a complex task or problem by breaking it down into its component parts and considering each part in detail.</b></p> <p><b>Identifies the many possible causes for a problem; uses a systematic process to identify source of problem and correct.</b></p> <p><b>Understands how related ideas, actions, or procedures fit together and can execute or articulate as one process, understanding different scenarios.</b></p>	<b>Problem Solving in the Workplace</b>

Cluster	Competencies	Key Actions	Interventions
	<p><b>Diagnostic Information Gathering—able to identify the information needed to clarify a situation, seek that information from appropriate sources, and use skillful and persistent questioning to draw out the required information.</b></p>	<p><b>Identifies the specific information needed to clarify a situation or to make a decision.</b></p> <p><b>Identifies the sources (such as web sites) or people (such as core office or college-level contacts) who can provide needed information; seeks out knowledgeable people to obtain information or clarify a problem.</b></p> <p><b>Gets more complete and accurate information by checking multiple sources.</b></p> <p><b>Probes skillfully to get information; asks questions to clarify a situation.</b></p>	
	<p><b>Problem Solving—solves problems with effective solutions.</b></p>	<p><b>Evaluates options by considering implications and consequences; chooses effective options.</b></p> <p><b>Implements solutions within a reasonable time.</b></p> <p><b>Evaluates effectiveness of implemented solutions.</b></p>	
	<p><b>Results orientation—able to focus on the desired result of one’s own or one’s unit’s work, set challenging goals, focus effort on the goals, and meet or exceed them.</b></p>	<p><b>Determines or identifies desired result and articulates it clearly to others.</b></p> <p><b>Develops challenging but achievable goals.</b></p> <p><b>Maintains commitment to desired results or goals in the face of obstacles and frustrations.</b></p> <p><b>Exerts unusual effort, over time, to achieve desired results or goals.</b></p> <p><b>Has a strong sense of urgency about solving problems and getting work done.</b></p>	<p><b>Achieving Results</b></p>

Cluster	Competencies	Key Actions	Interventions
<b>Personal Excellence— Communication and Building Relationships Skills</b>	<b>Networking and building collaborative relationships—able to develop, maintain, and strengthen partnerships with others inside and outside the organization who can provide information, assistance, and support.</b>	<b>Identifies and builds relationships with people whose assistance, cooperation, and support may be needed.</b>  <b>Provides assistance, information, and support to others to build a basis for future reciprocity.</b>  <b>Uses network of contacts to provide information and assistance when needed.</b>  <b>Expresses gratitude and appreciation to others who have provided information, assistance, or support.</b>  <b>Shows an interest in what others have to say; acknowledges their perspectives and ideas.</b>  <b>Recognizes the business concerns and perspectives of others.</b>	<b>Relationship Strategies</b>
	<b>Communication—able to express oneself (including concepts and procedures) clearly and in a way that helps others understand; ensures that information is passed on to others who need to be kept informed.</b>	<b>Ensures that important information is shared with those who need to know.</b>  <b>Ensures that regular, consistent communication takes place.</b>  <b>Organizes ideas clearly and expresses ideas concisely in speech and writing.</b>  <b>Tailors the content of speech and written communication to the level and experience of audience.</b>  <b>Uses appropriate grammar, punctuation, and word choice.</b>	<b>Communication Confidence</b>  <b>Communicate Assertively</b>  <b>Now Hear This: Listening, Comprehending, Communicating</b>  <b>Power Writing</b>  <b>Grammar Game</b>  <b>Punctuation Power</b>

Cluster	Competencies	Key Actions	Interventions
<b>Personal Excellence— Organizational Awareness and Experience Skills</b>	<b>Organizational awareness and experience—understands the university setting including, managerial structure (deans, directors, department chairs), relevant university relationships to the state, University Board of Trustees, Board of Governors, etc., as well as, key resources within the university.</b>	<b>Can provide feedback and assistance to new employees (faculty and staff) in navigating the complexities of a large university, including “the big picture.”</b>  <b>Knows and utilizes resources within university to provide information or assistance, to solve problems, or to connect internal customers (faculty and staff) with resources, even for issues outside his or her daily responsibilities.</b>	<b>UF 101: What Every Employee Should Know About UF</b>