I. **Most Frequently Cited Tasks and Role Expectations**

The following information represents the most frequently cited critical tasks expected by school, college or unit leadership and other UM stakeholders, as well as the most frequently cited tasks and expectations found in current administrators’ position descriptions.

**Finances**

**Budgeting**

- Plan and direct the development of the school, college, or unit operating budget and finances
- Assess incentives and disincentives associated with using different budget models
- Make timely and appropriate decisions related to finances on behalf of the school, college, or unit
- Ensure there is a healthy tension between budget and finances
- Advise the dean and other school, college, and unit leadership on impact of budget commitments and communicate arising matters
- Provide Provost’s office with good financial projections
- Structure internal budgeting processes and establish internal controls to monitor operations and maintain budget limitations in alignment with UM business processes

**Analysis and Strategic Thinking**

- Apply strategic thinking in administering the school, college or unit’s business in support of its academic mission and goals
- Understand the differences among unit budgets and be able to determine if spending is appropriate within each budget
- Develop long-term models to project the impact of changes or new assumptions affecting the school, college or unit’s budget
- Use strategic thinking to balance budget and finances either by utilizing existing funds or by creating new resources
- Propose school, colleges, or unit-wide savings opportunities through operational changes

**Human Resources**

- Direct and review the planning of all human resource activities related to the hiring, performance planning, disciplinary and professional development processes
- Oversee staff salary and total compensation programs
- Work with dean and department chairs or unit head in the recruitment and retention of faculty including setting salary and start up/retention packages
- Manage conflict of interest/commitment process and issues
Facilities and Construction Management

- Plan, oversee, and track on and off campus space allocations and determine the level of efficiency related to use and costs
- Oversee the planning and completion of facility renovations
- Organize and develop proposals for new buildings, including identifying needs and specifications
- Work with architects to provide building specifications and key considerations for all decisions made during construction
- Represent the dean or unit head during planning meetings for new buildings

Information Technology

- Provide administrative oversight and long term planning of IT infrastructure for classroom instruction and administrative support
- Work with IT staff and faculty in assessing computing and network efficiencies and needs
- Plan and approve all new equipment purchases

Support to Dean/Executive Officer/Director

- Foster an effective working partnership with the dean or unit head based on mutual trust, honesty and transparency in serving the best interest of the school, college or unit
- Act as a sounding board for ideas to help inform the dean’s or unit head’s thinking and decision-making
- Communicate and advise the dean or unit head on matters related to: the working environment; difficult information and feedback; and policies, procedures and controls
- Communicate and illustrate implications of budget consequences or shortfalls
- Participate in meetings, make decisions on behalf of the dean or unit head and provide timely follow-up to inform them and confirm these decisions
Management of School, College, or Unit

- Develop a deep understanding of the school, college, or unit’s mission, goals and working environment
- Effectively educate and communicate on operational matters related to budgets, finances and resources to dean and school, college or unit leadership
- Provide strategic planning, oversee the implementation of changes and ensure smooth coordination of all school, college or unit projects
- Use discretion, respect, diplomacy and good judgment in handling difficult or sensitive situations
- Ensure excellence, effectiveness and efficiency of the school, college or unit’s business operations
- Build and maintain an effective operations team

Relations with Other University Contacts

- Network and build strong working relationships with other staff and faculty across UM to provide better planning and problem-solving on behalf of the school, college or unit
- Develop a better understanding of the mission and goals of other schools, colleges and units and utilize that information in the planning processes
- Partner with the Chief Financial Officer’s office to establish proper controls for use of finances and resources

II. Minimum Skills and Abilities Needed to be Promoted into the Role

Interview information from current budget administrators and deans as well as position descriptions were used to identify the minimum skills and abilities an individual needs to assume a role as complex, challenging and influential as that of a business administrator.

Formal Education

- A bachelors degree is required with considerable experience and competency in finances
- A masters is highly desirable, especially in business administration

Experience

- Based on several position descriptions, seven or more years of progressive administrative experience is required
- A basic knowledge and expertise in budget and accounting either through formal education or informal specialized professional development
- A theoretical background of Human Resource administration and IT either through formal education or specialized training
- Knowledge or experience in overseeing facilities and space and the planning of new buildings
- A progressive level of experience in management and leadership roles
Human Resource Development

- Demonstrate how to successfully gather organizational information, extract data from it and exercise excellent judgment while planning for school, college or unit
- Demonstrate excellent analytical and problem-solving abilities
- Demonstrate systems thinking
- Demonstrate excellent interpersonal and verbal and written communication skills
- Demonstrate excellent organizational and project planning abilities
- Be a successful role model of desired organizational behaviors
- Ability to successfully build working relationships and collaborate with others
- Comfort working independently and taking initiative
- Understanding of and appreciation for higher education environment
### Critical Competencies of Business Administrators

The following charts represent four main categories of competencies cited as most important from all the interviews. Please see the full detailed notes of the specific knowledge, skills and abilities related to each competency in the appendix section.

#### Technical Competencies

<table>
<thead>
<tr>
<th>Competency</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Planning</td>
<td>Advanced knowledge of and ability to lead the planning and development of a budget that meets the Provost and CFO expectations and supports the mission and goals of the school, college or unit</td>
</tr>
<tr>
<td>Facilities and Space Planning</td>
<td>Ability to analyze space and plan for and manage minor and major capital outlay projects and facility maintenance projects</td>
</tr>
<tr>
<td>Financial Structure and Systems</td>
<td>Advanced knowledge of the UM funding structure and business systems related to tracking, reporting, and managing of the school, college or unit funds</td>
</tr>
<tr>
<td>Human Resources</td>
<td>Knowledge of human resource administration and best practices that support work productivity and efficiency</td>
</tr>
<tr>
<td>Institutional Understanding</td>
<td>Understanding of the University of Michigan’s scholarly mission and its work environment and culture</td>
</tr>
<tr>
<td>School, College, or Unit Understanding</td>
<td>Understands a school, college or unit’s mission, goals, work environment and culture and how it relates to contributing to the greater institution’s mission and goals</td>
</tr>
<tr>
<td>University Policies and Procedures</td>
<td>Awareness of the most important UM policies, procedures and guidelines impacting their work.</td>
</tr>
</tbody>
</table>

#### Strategic Competencies

<table>
<thead>
<tr>
<th>Competency</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>Analysis</td>
<td>Ability to interpret information or data, and create implications and identify conclusions and generate potential course of actions to be taken</td>
</tr>
<tr>
<td>Creativity and Breakthrough Thinking</td>
<td>Ability to generate new ideas or thoughts in addressing organizational problems or situations in different ways</td>
</tr>
<tr>
<td>Problem-Solving and Decision-Making</td>
<td>Ability to consider all information or data, sort through issues, and apply sound judgment in choosing a specific course of action in resolving organizational business matters</td>
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</tbody>
</table>
**Leadership Competencies**

<table>
<thead>
<tr>
<th>Leadership Competencies</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Communication (verbal and written)</td>
<td>Ability to interpret data or information and relate it to others in clear and concise ways so they understand and comprehend the meaning and intent</td>
</tr>
<tr>
<td>Teaching and Presenting</td>
<td>Ability to choose and present information to others in meaningful ways so they understand and comprehend the content and meaning</td>
</tr>
<tr>
<td>Developing Relationships and Partnerships</td>
<td>Ability to create and maintain positive working relationships with all levels of leadership, staff, faculty and other resource contacts outside of the school, college or unit</td>
</tr>
<tr>
<td>Building Teams</td>
<td>Ability to develop and lead a cohesive and productive team to meet work goals or projects</td>
</tr>
</tbody>
</table>

**Personal Competencies**

<table>
<thead>
<tr>
<th>Personal Competencies</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Achievement Orientation</td>
<td>Sets high standards and strives for excellence in achieving work goals and outcomes</td>
</tr>
<tr>
<td>Adaptability to Change</td>
<td>Understands change to be a constant circumstance in the work environment and takes appropriate action in responding to it</td>
</tr>
<tr>
<td>Initiative and Proactiveness</td>
<td>Ability to anticipate needs and take appropriate action without direction</td>
</tr>
<tr>
<td>Organizational Ability</td>
<td>Ability to plan and organize work tasks or projects to efficiently meet organizational needs and outcomes</td>
</tr>
</tbody>
</table>

**Other Valued Personal Traits**

These personal characteristics and traits were cited most often by stakeholders and leadership in describing what they expect and value most in a successful business administrator.

- Above average intelligence
- Honest
- Direct
- Fair
- Responsible
- Transparent
- Sense of humor
- Politically savvy
- Practical
- Have Integrity
- Derives satisfaction from their work
- Confident
- Encouraging and motivating
- Diplomacy
- Creative