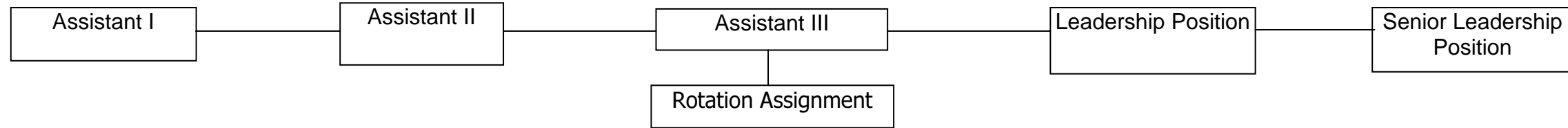
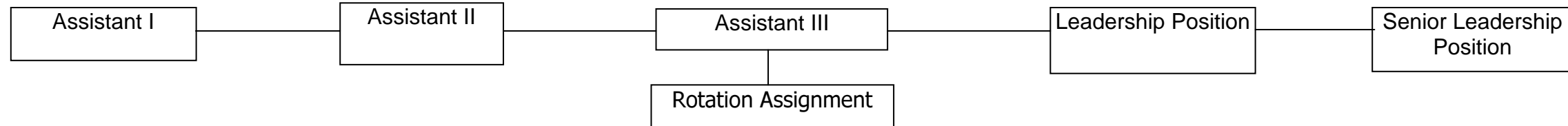


Career Road Map Process – UCSF Administrative Staff



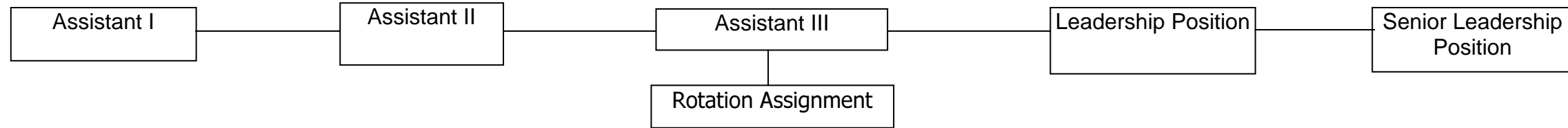
Time Line	0-2 yrs	1-3 yrs	3-6+ yrs	6-9 yrs	9yrs +
Position (across) Requirements (down)	• Assistant I	• Assistant II	• Assistant III	• Manager	• Senior Manager
Management's Role	<ul style="list-style-type: none"> • Campus & local orientations. • Annual review/developmental plan. • Counseling/mentoring. • Identify high potential employees for additional development. 	<ul style="list-style-type: none"> • All previously mentioned, and: • Stretch assignments 	<ul style="list-style-type: none"> • All previous mentioned, and: • Developmental rotations 	•	•
Assignment Description	<p>General:</p> <ul style="list-style-type: none"> ○ Work is closely supervised, highly repetitive and routine. ○ Instructions are available for each task ○ Little or no judgment or decision making is required. ○ May involve simple data entry tasks ○ Routine knowledge of several standard functions; standard organizational knowledge (e.g. payroll, purchasing, accounting); ability to use standard work processing and related computer software packages. <ul style="list-style-type: none"> • Accounting- Prepare wide variety of accounting forms; reconcile to general ledger; responsible for accuracy; identify discrepancies and make corrections. • Fiscal Administration/Contracts & Grants- Set up accounts; monitor expenses; reconcile ledgers; prepare status reports; apply rules, regulations, and past precedents • Proposal preparation: Compile information from readily available sources and type forms. • Payroll: Process limited variety of transactions for small staff; routine payroll actions; check on status of checks; process action to resolve discrepancies. • HR: Prepare and type forms, provide basic 	<p>General:</p> <ul style="list-style-type: none"> ○ Work is routine, and performed under supervision. ○ Responsible for end product, and recognizing and referring problems or errors to supervisor. ○ Operational level data entry. ○ Basic word processing &/or filing. ○ Answering calls, greeting callers, conveying standard information taking messages, & referring callers to other individuals or offices. ○ Knowledge of standard office and administrative procedures & basic organizational skills <ul style="list-style-type: none"> • Accounting – Prepare and review forms applying knowledge of basic accounting principles; resolve problems by performing qualitative review of individual cases. • Fiscal Administration/Contracts – Assist in preparing budget for contract and grant proposals; provide advice re: budget projections; monitor expenses for different agencies; transfer funds; prepare content of status reports. • Proposal Preparation – Gather data & information from diverse sources; recommend budget allowances and make projections; review for format and content structure based on knowledge of agency specifications; solve problems and respond to requests for information. • Payroll – Complete payroll function for sub 0.1.2; larger number and varied accounts (e.g. Contracts & Grants); oversee preparation of payroll forms for complex payroll (e.g., shift differential, overtime, multiple contracts). • Personnel – Initiate full range of processing 	<p>General:</p> <ul style="list-style-type: none"> ○ Apply detailed knowledge of standard University procedures, e.g. processing purchase orders, travel advances. ○ Standard bookkeeping or payroll tasks. ○ Scheduling of meetings ○ Routine bill processing. ○ Decision making regarding bills, scheduling, accuracy of data, and correcting errors in accordance with departmental or unit guidelines. ○ Apply clearly stated policies & guidelines to their work. ○ Patient contact & scheduling. ○ Using automated systems for scheduling. ○ Journey level word processing skills. ○ Basic data management tasks. ○ Routine review & interpretation of data entered. ○ Produce basic reports. ○ May interview subjects using open ended protocol. <ul style="list-style-type: none"> • Accounting – Supervise forms processing; entry level professional knowledge of basic accounting principles; may have responsibility for multiple accounts with special requirements; resolve non-routine problems. • Fiscal Administration/Contracts & Grants – Provide preliminary analysis and develop budget recommendations and projections; administer several complex contracts and grants with multiple fund sources. • Proposal Preparation – Research, compile, and analyze information to prepare/supervise proposal preparation based on subject matter knowledge; ensure relevant specifications are met; resolve non-routine problems. • Payroll – Perform/supervise highly complex payroll & benefits activity (e.g., contract employees, Non-Senate Academics, by agreement) for a large department/division/school; resolve non-routine problems; interpret policies & contracts; implement new campus policies & procedures. • Personnel – Supervise or perform personnel 	<p>General:</p> <ul style="list-style-type: none"> • Work is more broad-based, variable, and not routine • Works with minimum day to day supervision • Responsible for over all unit performance • Supervises and develops staff, and administers human resource law and guidelines • Serves as primary point of contact for the unit to the rest of the university <p>Planning</p> <ul style="list-style-type: none"> • Develops overall plan for the unit, and coordinates work products and effort. <p>Organizing—</p> <ul style="list-style-type: none"> • Distributes tasks among other s and the coordination of effort. • Establishes unit priorities. • Coordinates unit products and impacts with other units. <p>Controlling</p> <ul style="list-style-type: none"> • Provides day to day oversight of unit operations and staff. • Makes decisions affecting unit objectives, priorities, and budget • Coordinates the impact of unit efforts with the impact on other units. • Monitors compliance with law, policy, and contracts. <p>Evaluating</p> <ul style="list-style-type: none"> • Monitors unit performance. 	<p>General:</p> <ul style="list-style-type: none"> • In addition to the previous: • Responsible for outcomes affecting significant other portions of the organization • May manage more complex, multi-functional units or functions • May supervise other supervisors and managers • Much of time is spent in meetings addressing issues of strategy, coordination, and policy. • May cultivate in-depth expertise in more than one area of endeavor.

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Time Line	0-2 yrs	1-3 yrs	3-6+ yrs	6-9 yrs	9yrs +
	<p>new employee benefits materials, check for entry discrepancies, provide information on personnel policy/procedures.</p> <ul style="list-style-type: none"> Purchasing: Order general office and/or laboratory supplies; prepare purchase order/requisition; perform order entry; may obtain sourcing and pricing information and vendors to resolve discrepancies; follow up to assure delivery. Information Systems: Data entry with some knowledge of program (e.g. academic). 	<p>for personnel actions; conduct new employee orientation; provide benefits information; resolve personnel processing problems; explain, interpret & apply personnel policies & procedures.</p> <ul style="list-style-type: none"> Purchasing – Research and recommend vendors/prices/equipment; identify substitutes for supplies and low value equipment; may place releases up to \$50,000 for supplies based upon the system wide or campus master agreements; may participate in contract negotiation up to \$2,500; serve as “preparer” or “reviewer” of purchase order/requisition. Information systems – Operate software packages such as Excel, Access, Filemaker Pro and internal UC systems; develop formulae for moderately sophisticated spreadsheets; set up routine computer procedures; resolve simple software/hardware problems; update and maintain WEB pages using knowledge of HTML. 	<p>functions including staff and/or academic searches; analyze policy & procedures recommending and implementing administrative changes for the unit/department; resolve non-routine and unusual personnel problems.</p> <ul style="list-style-type: none"> Purchasing – Perform/supervise complex and high volume purchasing activity; determine needs for supplies and specialized equipment; frequent research & determination of vendors & prices; determine vendor & substitutes for specialized equipment; knowledge of technical or specialized equipment/field; may participate in contract negotiation up to \$2,500. Information systems – Operate/manage highly complex databases & software to maximum capacity; troubleshoot; analyze procedures & policies for interface with program and Website developers; train other staff, research & recommend hardware and software for general administrative use. 		
Pre-requisites	<p>Inter-personal Skills:</p> <ul style="list-style-type: none"> Effective communication skills Ability to work in team-based environment <p>Attributes:</p> <ul style="list-style-type: none"> Able to perform multi-tasks under the direction of others. Problem Solving & Decision-Making; Solve routine problems of a repetitive nature; resolution of factual information where there is a “right” answer or a precedent; use judgment to select means of doing a job from standard office methods; follows, but does not interpret guidelines. Independence – close supervision; specific oral and/or written instructions are provided as guidelines; anything not covered by the specific guidelines is referred to supervisor; responsible for “bits and pieces” of a process Business Ethics <p>Skill Competency:</p> <ul style="list-style-type: none"> High School graduation & 2 years of related administrative, clerical experience, or an equivalent combination of education and experience. 	<p>Inter-personal Skills:</p> <ul style="list-style-type: none"> Effective Communication Skills Ability to work in a team-based environment. <p>Attributes:</p> <ul style="list-style-type: none"> Independence – work independently with limited supervision; responsible for several complete processes. Independence/Accountability; General supervision; responsible for a complete process or a small unit; oral and/or written guidelines provided; apply wide variety of rules, regulations and procedures. Problem Solving & Decision Making – Regular use of judgment and discretion to solve operational problems where answer is not apparent; select best solution from several “right” answers or no precedent; determines own schedules and work priorities; make suggestions for process improvement; interpret oral and/or written guidelines to solve problems. <p>Skill Competency:</p> <ul style="list-style-type: none"> High school graduation and 3 years of related administrative, clerical experience, or an equivalent combination of education and experience. 	<p>Inter-personal Skills:</p> <ul style="list-style-type: none"> Effective Communication Skills Ability to work in a team-based environment. <p>Attributes:</p> <ul style="list-style-type: none"> Independence/Accountability; Authority for a unit to act on day-to-day operational decisions with minimum supervision; work with general guidelines which may not be directly applicable or may not be clear; establish written procedures/ instructions when there are deviations from or changes in policy. <p>Skill Competency:</p> <ul style="list-style-type: none"> High school graduation and four years of related administrative and clerical experience, or equivalent combination of education and experience. 	<p>Inter-personal Skills:</p> <ul style="list-style-type: none"> Effective Communication Skills Ability to work in a team-based environment. <p>Attributes:</p> <ul style="list-style-type: none"> Independence/Accountability; Authority to act on day-to-day operational decisions with minimum supervision; Ability to plan, organize, control and evaluate more complex projects Planning Ability to think critically and to consider more wide-ranging impacts of decisions and actions Ability to evaluate alternative actions and resource implications Ability to negotiate relations and decisions within ambiguous situations. <p>Skill Competency:</p> <ul style="list-style-type: none"> Advancement may be based a blend of experience, demonstrated results, and academic education. An academic degree at the Bachelor level is often the norm, with an advanced degree preferred. 	<p>In addition to the previous</p> <ul style="list-style-type: none"> Ability to negotiate resources from among higher level peers and superiors Ability to monitor overall unit functioning and productivity and to implement significant process changes, where needed Participate with senior level managers in strategic planning and implementation. Ability to deal with ambiguity and change
Development Goals (specific competencies in a context)	<ul style="list-style-type: none"> Develop ability to work independently. Develop lead abilities by heading a small project or supervising temp employees. Execute non-specific projects requiring independent thinking and problem solving. OLPPS & Weblinks 	<ul style="list-style-type: none"> Develop ability to work independently. Develop lead abilities by heading increasingly complex projects or supervising temp employees. Execute non-specific projects requiring independent thinking and problem solving. 	<ul style="list-style-type: none"> Continue developing ability to work independently. Develop leadership abilities by leading project teams, participating in cross-functional committee-based projects or supervising temp. employees 	<ul style="list-style-type: none"> Develop critical thinking skills Develop higher level organization-wide awareness of stakeholders Coordinate and execute more complex, high visibility programs involving multiple organizational functions. 	<ul style="list-style-type: none"> Continue same as before Develop in-depth understanding of other organizational functions to understand needs and interests. Develop awareness of governance, affected by forces outside the organization.

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	<ul style="list-style-type: none"> Accounting Forms/Ordering Procedures 	<ul style="list-style-type: none"> Develop ability to work within a team context. Developing public presentation skills OLPPS & Weblinks 	<ul style="list-style-type: none"> Develop writing and public presentation skills Develop analytical skills Develop financial skills/OLPPS & Weblinks 	<ul style="list-style-type: none"> Cultivate more in-depth expertise in a particular functional area. Develop change management skills Develop ability to present opinion, options and perspectives, grounded in data analysis Develop the ability to make decisions relative to needed and existing resources Develop 1-1 and team-based coaching/mediation skills Develop training skills 	
Structured On the Job Training (Critical Knowledge and Skills)	<ul style="list-style-type: none"> Look for opportunities to carry out tasks described in AAll assignment description. 	<ul style="list-style-type: none"> Volunteer for more complex projects Seek out committee work to provide input and to observe and participate in team processes. Volunteer to facilitate meetings or portions of meetings, and to publish minutes Seek opportunities to research an agenda item for a meeting and to present your findings to the group. 	<ul style="list-style-type: none"> Volunteer for more complex projects Seek out committee work to provide input and to observe and participate in team processes. Volunteer to facilitate meetings or portions of meetings, and to publish minutes Seek opportunities to research an agenda item for a meeting and to present your findings to the group. Seek opportunities to work on project budgetary issues Develop advanced spreadsheet skills for purposes of data analysis and making recommendations 	<ul style="list-style-type: none"> Volunteer for more complex projects Develop relationships and alliances with higher level managers Seek out committee work involving cross-functional representatives working in a team setting. Volunteer to facilitate higher level meetings. Seek opportunities to research and to present findings on more complex issues at meetings and committees, grounded in data and analysis. Learn to develop the financial language of business Develop an understanding of this organization's culture and strategy Develop advanced spreadsheet skills for purposes of data analysis and making grounded recommendations 	<ul style="list-style-type: none"> Participate in off-site leadership development seminars Participate in technical seminars to develop strategic functional perspectives.
Core Programs Essential Training	<ul style="list-style-type: none"> Survival Skills for the Administrative Assistant. Word. Excel PowerPoint Access I or Filemaker Pro Travel & Entertainment Expense Processing. Material Management/Purchasing Vendor Payments Workers' Comp Payroll Procedures & Web Calculators Fund Accounting & General Ledger Basics ICAs 	<ul style="list-style-type: none"> Survival Skills for the Administrative Assistant. Word. Excel PowerPoint Access I or Filemaker Pro Participate in professional organizations, such as the Intl Assoc. of Admin. Professionals 	<ul style="list-style-type: none"> Supervisor Training Program Management Skills Assessment Program (MSAP) Academic Business Officer Group (ABOG) UCSF Mentoring program Consider a specialized academic certificate or college degree if you don't already have one. 	<ul style="list-style-type: none"> Participate in MSAP Business Officer Institute (BOI) Consider a college degree or advanced degree, or specialized education programs. Consider external management development seminars Participate in ABOG Participate in the Mentoring program 	<ul style="list-style-type: none"> Consider executive coaching with multi-rater feedback Participate in strategic planning and implementation, and policy formulation activities Seek out rotational assignments Off-site advanced academic management development programs
Targeted Training (Recommended)	<ul style="list-style-type: none"> Team Development Customer Service Skills 	<ul style="list-style-type: none"> Project management Meeting participation skills Interpersonal communication skills Basic financial processes and analysis 	<ul style="list-style-type: none"> More complex project management Public speaking Basic supervision skills Facilitation skills Budgeting and budget analysis Intermediate spreadsheet skills 	<ul style="list-style-type: none"> More complex project management Supervision skills Develop knowledge of law and policies Develop organizational awareness Develop advanced financial awareness and analytical skills 	<ul style="list-style-type: none"> Governance High level organizational system analysis, modification and integration seminars Anticipate environmental factor on organizational functioning State of the art management issues in your functional area