

### ACUBO Competency Survey. Completed September 2005

ACUBO represents a coalition of the five associations serving college and university business officers—CACUBO, EACUBO, NACUBO, SACUBO and WACUBO. Formed in 2001, the ACUBO coalition uses a knowledge-based approach to strengthen member services through collaborative projects. The survey's purpose was to identify key competencies and the professional development needs of finance and business professionals.

Competencies are listed for each of the major job groups of respondents.

Chief Business Officers 2,200 surveys, 241 responses, 11%

Staff in the Business Office, 6,000 surveys, 613 responses, 10%

Individuals, Administrative & Financial Responsibilities, Academic, Other Units, 500 surveys, 55 responses, 10%

	<b>Individuals with Administrative and Financial Responsibilities in Academic or Other Units</b>	Importance	PD Complex	Comp. Type
Accounting/Auditing	Internal audits	2.69	33	O
	External audits	2.36	29	O
Administration	Projecting the need for and obtaining resources to carry out initiatives	3.38	42	L
	Accounting concepts (e.g., accruals; prepaids; fixed assets)	3.13	27	C
Budgeting and Planning	<b>Strategic and multi-year financial planning (e.g., operating vs. capital budgets; projecting expenses; analyzing historical data)</b>	<b>3.80</b>	<b>51</b>	T
	<b>Budget development, management and oversight</b>	<b>3.80</b>	<b>33</b>	T
	Budget as a management communications tool	3.39	44	O
	Identifying internal and external funding sources	3.27	40	T
Business Knowledge and Skills	Internal control systems	3.30	47	T
Business Process	<b>Business process and improvement techniques (e.g., business mapping; process mapping; process redesign)</b>	2.93	<b>55</b>	T
Capital Projects Planning and Management	Space planning, utilization and management	2.40	45	T
	Capital project planning (e.g., feasibility study; select and manage project team; financial modeling; programming)	2.36	40	T
Communications	Communicating effectively with diverse individuals and groups	3.47	45	L
	Managing expectations	3.40	49	L
	Communications--interactions and follow through (e.g., solicit feedback; identify ways to improve; develop future plans; follow-up on problem areas; reinforce positive gains)	3.23	49	O
	Interpreting policies and procedures between/among constituencies within the institution	3.00	38	O
	Selecting and applying communications techniques based on situation and audience	2.98	47	O
Conflict Management	<b>Conflict resolution</b>	3.18	<b>62</b>	L

**Importance:** How important is this competency to perform effectively in your current position? (Scale of 0 to 4; 0= no importance; 4= very important) Average of responses shown; bolding for those rated 3.5 or above

**PD Complex.** Percentage of respondents who selected, "I could use professional development to handle complex and/or unusual issues/situations more effectively." Bolding for those with scoring of 55 percent and above.

**Comp. Type.** C= Core: business operations of a higher education institution; T= Technical: major business areas; O= Organizational: performance management and organizational oversight; L= Leadership: determining institutional directions and encouraging and/or enabling others to achieve those directions

	<b>Individuals with Administrative and Financial Responsibilities in Academic or Other Units</b>	Importance	PD Complex	Comp. Type
Diversity	Supporting diversity in the workplace	3.16	42	L
Ethics	<b>Adhering to ethical business principles and promoting ethical behavior</b>	<b>3.76</b>	<b>31</b>	L
Financial Management	Financial reporting concepts (e.g., non-profit/fund accounting including endowment management)	3.17	36	T
Goals	Goal setting and implementation strategies	3.13	40	O
Grants and Contracts, Sponsored Programs	Grant and contract management (budgeting, control, reporting, closeout and collection)	2.64	42	T
	Indirect cost concept	2.60	40	T
	Indirect cost applications (e.g., off campus/on campus; modified total direct cost [MTDC])	2.42	33	T
	Regulation and compliance (e.g., A-21 and A-110 cost principles; intellectual property; cost sharing; export controls; certifications and compliance [human subjects, HIPAA])	2.39	45	T
	Pre-award management (e.g., budget development, proposal preparation, and review)	2.15	31	T
Higher Education Environment	Regulatory and political environment in which the institution functions (e.g., tenure; academic governance; academic freedom)	3.24	42	C
	<b>Socioeconomic environment in which the institution functions (e.g., market forces; workforce issues; community; state; national and international)</b>	2.72	55	C
Human Resources	Working with and/or managing people with different behavioral and learning styles	3.29	47	L
	Supervising the workforce (e.g., hiring; planning work; motivating; delegating and empowering)	3.25	42	O
	Human resource management (e.g., the institution's compensation and benefits systems; labor relations; performance management; governmental requirements--non US citizens)	2.95	45	O
Metrics/Measurement	<b>Strategic and operational measures (e.g., benchmarks; budget; systems; performance; productivity measures): developing internal and external measures</b>	3.35	71	T
	<b>Employing comparative analysis strategies</b>	2.94	55	T
Mission	Institutional vision, mission, and objectives	3.36	22	C
Organizational Dynamics and Governance	Organizational dynamics including the governance structure, political realities, and the institutional and departmental culture (internal focus)	3.20	53	C

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Professionalism	Acquiring and staying current with the professional body of knowledge (e.g., participating in one's professional organization)	3.20	53	L
	Networking with colleagues (internal and external)	3.11	40	L
Relationships	<b>Creating an organizational climate that facilitates individual motivation, commitment, achievement and growth</b>	3.24	<b>55</b>	L
	Managing relationships (e.g., academic units; external stakeholders)	3.22	45	O
	Leadership styles/techniques of self and others	3.11	53	L
Risk Management	<b>Liability (e.g., regulatory compliance; financial; general; property; contract management; personnel management issues)</b>	2.98	<b>60</b>	T
Roles	Roles of the different constituent units in the institution	3.18	22	C
Strategic and Tactical Planning	<b>Design process for creating short-range and long-range strategic plans</b>	3.04	<b>58</b>	O
Strategy	<b>Exploring opportunities for the growth and development of the organization on a continuous basis</b>	3.20	<b>71</b>	L
Technology	<b>Information systems</b>	2.98	<b>60</b>	T
	Security issues (e.g., identity theft; password protection; confidential information; data security-- authorization and access)	2.80	44	T
	Technology trends	2.51	47	T
	Internet liability issues	2.33	38	T
Use of Computer Technology	<b>Desktop applications (e.g., database; spreadsheets; query tools)</b>	<b>3.55</b>	<b>49</b>	T
	<b>Enterprise Wide Solution (e.g., SAP; PeopleSoft; Oracle)</b>	2.98	<b>55</b>	T
	Research techniques using the internet	2.11	35	T

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