

PROCESSING AND RETENTION OPERATIONS UNIT MANAGER ROLE

Role Summary

The Processing and Retention Operations (PRO) Unit Manager Role consists of one grade level (15). Incumbents are responsible for managing the day-to-day activities of their respective units; assist the bureau chief in determining short and long-range goals and objectives; and monitor and report the progress of work plans, goals, and objectives to the bureau chief. Primary contacts are the division administrator, bureau chief, management officer, staff, other agencies, and internal/external customers.

Working Conditions

Considerable mental stress and pressure due to supervisory issues, workload, deadlines, time constraints, and significance of decisions made. Must be able to supervise numerous projects at one time and determine priorities on a daily basis.

Education and Experience

- Grade 15: competencies and degrees of proficiency are typically acquired through a combination of education and experience equivalent to a bachelor's degree in business, public administration, or closely related field; three years of experience with document processing procedures, document processing technology, tax and/or data management systems; and one year of supervisory experience. Other combinations of education and experience will be evaluated on an individual basis.

Department Core Competencies

In addition to the role specific competencies, there are four, department core competencies that all employees are expected to successfully achieve. These are:

- *Interpersonal Skills:* Builds constructive and effective relationships with internal and external customers and is committed to meeting customer needs in a timely and accurate manner. Listens actively and attentively and demonstrates an appreciation of other perspectives. Builds the appropriate rapport required to do business. Openly demonstrates an understanding of and respect for the value of co-workers' contributions to the department mission.
- *Decision-Making and Accountability:* Considers the department's vision, mission, and values in making decisions and taking actions. Identifies and considers possible alternatives before making decisions. Bases decisions on achieving desired outcomes pursuant to the departmental business plan or management direction. Uses a combination of analysis, experience, and sound judgment that results in fairness and consistency, while being accountable for actions. When serious ethical issues are at stake, takes all necessary actions.
- *Commitment to Continuous Improvement:* Ability and willingness to continually seek greater efficiency in agency programs, is results driven, and meets changing requirements in work or direction. Adapts to changing conditions and work responsibilities. Accepts constructive criticism and suggestions and uses them to improve performance.

- *Personal and Work Ethics:* Creates own measures of excellence, and practices what he/she promotes. Sets goals that provide challenges and measures goal attainment regularly. Displays a contagious optimism about the work to be done. Goes beyond traditional ways to address issues despite obstacles or resistance. Is able to generate ideas, fresh perspectives, and original approaches and engages in open-minded thinking. Employs strategies to promote ideas and proposals to increase probability of acceptance. Mentors others to improve the performance necessary to achieve success. Reflects a belief that the results achieved are a direct result of his/her personal decisions and actions.

Grade Levels

Each grade level lists the essential duties that describe work performed 50 percent or more of the time (predominant work). Established work plans identify day-to-day tasks.

Grade 15

Predominant/Essential Duties

- Assist the bureau chief in determining short and long-range goals and objectives associated with the unit.
- Make necessary resource allocation decisions for unit functions.
- Coordinate efforts with necessary individuals to identify resource needs across bureau activities.
- Define work responsibilities for the unit functions.
- Supervise, coordinate, monitor, and review assigned duties of the teams/individuals to ensure work plans are accomplished and tasks are completed timely and accurately.
- Coordinate efforts with the unit and affected teams to establish work priorities of the team on a weekly and monthly basis.
- Coordinate the development of timelines and parameters for work plans based on established goals and objectives.
- Make and enforce decisions dealing with hiring, discipline, individual performance, leave or flextime, and recommend termination.
- Perform performance appraisals of subordinate staff.
- Assist the bureau chief in developing solutions for resolving problems and/or potential problems that arise during planning and implementation efforts.
- Coordinate efforts to establish Integrated Revenue Information System (IRIS) training, system defect resolution and enhancement priorities in relationship to workload, work priorities, and work concerns and issues.
- Coordinate the development of IRIS checks and balances to review and monitor individual work performance regarding the use of IRIS applications related to bureau/unit activities.
- Identify and develop key monitoring points to ensure quality work and efficiencies are achieved.
- Identify training needs.
 - Establish on-the-job training.
 - Assign mentors and monitor progress of training.
 - Coordinate the development of training curriculums.
 - Provide training to staff on an ongoing basis.
- Identify areas where improvement in process activities could take place and determine improvement solutions for these areas.
- Coordinate the development and implementation of procedures, guidelines, and standards for unit activities.

- Coordinate the design and development of software applications used to monitor and maintain team activities.
- Develop spreadsheets, graphs, charts, and presentations for legislature and leadership under guidance of the bureau chief to illustrate accomplishments related to processing of payments and returns processing.
- Coordinate the development of legislation and legislative presentations related to bureau and unit activities and procedures.

Competencies and Degrees of Proficiency

The Competency/Proficiency Chart identifies the role specific competencies, degrees of proficiency, and guidance required for each grade level. Role specific competencies describe the knowledge, skills, and abilities required to perform the essential duties. The degrees of proficiency indicate the difficulty and/or complexity level of the tasks and assignments.

Competency/Proficiency Chart – Processing and Retention Operations Unit Manager Role

Competencies	Grade 15 Minimal Guidance
Demonstrated skill and ability to work on multiple tasks.	C
Demonstrated ability to provide timely and effective written, oral, and interpersonal communication.	C
Demonstrated ability to think creatively and recommend innovative solutions.	C
Proactively focus efforts and energy on successfully attaining goals and objectives, assuming accountability for decisions, actions and results. Follow issues through to completion.	C
Demonstrated knowledge and ability in conflict resolution techniques relative to the role.	C
Demonstrated knowledge of department business processes and ability to apply that knowledge effectively.	C
Demonstrated knowledge and effective application of federal/state statutes, administrative rules, and state policies and procedures relative to the role.	C
Demonstrated skill and ability to identify and allocate resources.	C
Demonstrated ability to understand the value, objectives, and political structure of the organization.	C
Demonstrated skill and ability to make decisions based on less than complete information.	B
Demonstrated knowledge of concepts and practices of personnel management and supervision.	C
Demonstrated ability to analyze operations and apply theoretical knowledge of management principles.	B
Demonstrated skill and ability to build long-term internal and external relationships with customers critical to the organization.	C
Demonstrated knowledge of department tax types and their relationships within the organization and within GenTax.	B

Degree of Proficiency

A: A degree of knowledge, skill or ability commensurate with elementary-level tasks and assignments.

B: A degree of knowledge, skill or ability commensurate with intermediate-level tasks and assignments.

C: A degree of knowledge, skill or ability commensurate with advanced-level tasks and assignments.

D: An advanced degree of knowledge, skill or ability commensurate with considerable experience and the application of the competency to non-standard tasks and assignments.

E: The most advanced degree of knowledge, skill or ability evidencing complete mastery and understanding of the subject.