



## **15. QUALIFICATIONS REQUIRED FOR EFFECTIVE PERFORMANCE**

- a. **Education:** The individual filling this position must possess a 4-year undergraduate degree in Administration, Accounting or Finance. Plus, a Certified Public Accountant (CPA) valid license is required.
- b. **Prior Work Experience:** Eight years experience in admin, accounting or finance is required.
- c. **Post Entry Training:** New APHIS employee's orientation, Civil Rights, EEO, and accounting system's on-hand training will be required.
- d. **Language Proficiency:** List both English and host country language(s) proficiency requirements by level (II, III) and specialization(sp/read): Level III (Good working knowledge) speaking/reading/writing English language is required. Level IV (Fluent) reading/speaking/writing Spanish is required.
- e. **Job Knowledge:** Knowledge of diplomatic missions and programs is required. Knowledge of laws, regulations, and administrative procedures associated with US government institutions is required. Knowledge of Panamanian laws and regulations pertaining to labor benefits and payroll deductions is required. Must be a computer-oriented person since part of the analytical criteria will be based on reports produced by computerized programs. Knowledgeable on various e-mail systems since primary communication channels are based on electronic platforms is required. Additionally, wide knowledge of Microsoft Office (Microsoft Word, Excel, PowerPoint) is required in order to assist the APHIS and/or COPEG staff on presentations for conferences, seminars and Regional meetings.
- f. **Skills, and Abilities:** Must be able to analyze complex financial reports and to produce presentations for the executive team in a less technical language. Ability to foresee and advise Directors on financial impact of actions taken by the Commission is required. Must possess ability to develop his/her duties within established norms and regulations).

## **16. POSITION ELEMENTS**

- a. **Supervision Received:** This employee is supervised and receives specific instructions from the Senior Administrative Officer (FP-2) on duties and tasks to be performed.
- b. **Supervision Exercised:** Incumbent will be responsible of supervising the COPEG Accounting Chief and approximately ten Commission's employees working in the Finance/Accounting department.
- c. **Available Guidelines:** USDA Regulations, bulletins, agency procedures and administrative notices, GOP regulations, COPEG administrative manuals, and verbal guidelines from agency supervisor.
- d. **Exercise of Judgment:** Must possess ability to exercise solid, sound judgment in carrying out duties and responsibilities with minimum supervision, as well as good working relationship with all personnel.
- e. **Authority to Make Commitments:** Has limited authority to make commitments on behalf of the agency in absence of the Admin Officer (sign checks).
- f. **Nature, Level, and Purpose of Contacts:** Maintains effective working relationships with the Commission's executive team, host country counterparts, Embassy's administrative staff, contractors, in arranging for services as needed and resolving any problems regarding such services.
- g. **Time Expected to Reach Full Performance Level:** Because of the complexity of the position and organization where he/she performs, a minimum of twelve months will be required.

Continuation....

#### **14. MAJOR DUTIES AND RESPONSIBILITIES**

Analyses reports generated by the accounting system. Reviews and signs Financial Statements for the Commission and evaluates impact on approved budget informing the executive staff of any variances or changes that might affect the normal development of the Commission's plans. Must ensure accounting cycle is accomplished in accordance with approved norms and regulations.

#### **30% OF TIME**

Provides the Screwworm Program Director, US COPEG Directors, and/or Administrative Officers, an overview of the Commission's financial status and provide financial status of funds on a regular basis. Monitors the COPEG budget planning and execution process and provides alternatives for contingencies and unforeseen expenses. Advise executive team on financial management and administrative matters.

Participate as part of the executive team in working groups to solve problems generated by administrative processes.

Serve as back-up cosigner for COPEG bank accounts.

## Computer Aided Job Evaluation (CAJE)

### Job Discussion Help Sheet (JDHS)

#### for Job Holders and Supervisors

Current job title FINANCIAL SPECIALIST

Current series and grade FSN-

Mission/Agency/Office United States Department of Agriculture (USDA)  
Animal and Plant Health Inspection Service (APHIS)  
International Services (IS)

#### Help sheet drawn up by:

Manager/supervisor John J. Hurley

Incumbent \*\*VACANT\*\*

*Interview date/time/place*

\_\_\_\_\_

*Return form to HR*

*Evaluator NLT:*

\_\_\_\_\_

#### Completing this document

The completion of this document will help *you* prepare for the job discussion with the HR Evaluator conducting the job evaluation. It is important that the evaluation of a job is carried out based on complete, accurate and objective data. As the present manager/supervisor (or the incumbent) you can provide valuable information on the types of responsibilities and demands that the job faces. Remember – it is the job that is being evaluated, not personal performance of the job holder. When thinking about the job, presume that the job duties are being performed at the fully successful level. Consider only the regular and recurring job duties and responsibilities, not necessarily events or achievements that are accomplished on a one time only basis.

The job discussion help sheet is divided into a number of sections: the position in the organization; the main purpose and duties; and questions corresponding to each of the five CAJE evaluation factors. The five CAJE factors are:

- Responsibility. Considers the extent to which the job controls resources, the amount of discretion the position possesses and the level of advice provided to others.
- Knowledge. Considers the type of knowledge, education, training, experience and skills that is essential to be considered for the job.

- Intellectual skills. Concentrates on the types of intellectually demanding tasks and situations that anyone doing the job must tackle.
- Communication. Records the type and nature of contacts with which the position must communicate in order to do the job effectively.
- Environment. Considers where the job is carried out, the types of potential hazards and physical demands, as well as any unusual work pattern demands.

Please refer to the position description, where appropriate.

### 1. Position in the organization

Please draw a simple organization chart (or attach an up to date chart). Please include at least two levels above and below the job. Identify the position being discussed with an asterisk (\*).

**Please refer to Attch 1 – Organizational Chart**

### 2. Main purpose and duties

Please describe, in a sentence or two, the main purpose/essence of the position

**Incumbent performs duties as the Panama-United States Commission for the Eradication and Prevention of Screwworms (COPEG) Finance Chief providing administrative support through a day-by-day analysis of its financial reports and accounting data. He/She will supervise approximately eleven employees working under the Finance/Accounting Department and will be responsible for all actions that this supervisory factor involves.**

Please expand on the main purpose by describing 4 or 5 key aspects of the job. For example, describe the 4 or 5 major “roles” this job has. Exclude duties performed less than 10% of the job holder’s time:

**1. FINANCIAL ADMINISTRATION:** Incumbent is responsible for day-to-day operations of the COPEG Finance Department. Reviews and signs Financial Statements for the Commission and evaluates impact on approved budget informing the Executive Staff of any variances or changes that might affect the normal development of the Commission’s plans. Must ensure accounting cycle is accomplished in accordance with approved norms and regulations.

**2. ANALYSIS:** Analyzes data captured and reports produced by the accounting and budget systems. Identifies discrepancies and coordinate required corrective actions.

**3. FINANCIAL ADVISORY:** Must provide to the US and/or Panamanian officials an overview of the Commission’s financial status on a recurring basis. Monitor the COPEG budget planning and execution

process and be able to provide alternatives for contingencies and unforeseen expenses. Advise executive team on financial management and administrative matters.

**4. SUPERVISORY RESPONSIBILITIES:** He/she is responsible for supervising approximately 11 employees working under the Finance Department and all aspects involved in this supervisory role.

*Interviewer's notes*

### 3. Responsibility

This factor considers the extent to which the position requires the planning, organization, direction and control of resources (money, people, equipment, supplies, land, buildings, information). Consider the scale of the resources and the authority of the job holder to manage those resources. This factor also considers the freedom to act with which the job holder is expected to have, the advice given and the resulting impact the position has internally and externally.

**3.1 Staff/contractors** This question involves information about the “people” resources managed by the job holder. Management and/or supervision of people resources have different dimensions, from guiding others to full supervision. Please indicate the jobs of any staff/contractors controlled, specifying the number of people in each job. Please complete each sub-section where applicable, but avoid double counting. Example: Line Management for 4 employees would not be listed in Daily Work Guidance for the same group of people.

Long term strategic planning of staff. <i>This means planning for an entire workforce in a large organization. This is not actual supervision or traditional line management of staff.</i>	<b>Incumbent must coordinate with Commission HR staff to assure that obligated funding will be available for long term workforce needs.</b>
Line management of staff. <i>This means full administrative and technical supervision of staff. Full supervision implies approval of leave, selection of new employees, applying discipline, and monitoring employee performance. Include the total number in the job holder's own "chain of command".</i>	<b>Incumbent is responsible for full supervision of ten employees assigned to the Finance Department as well as the Accounting Chief (mid level supervisor).</b>
Project management. <i>This implies management of people in a project setting, where the project has a defined duration. Exclude persons counted in "line management" above.</i>	
Contractors. <i>This means persons outside the job holder's normal chain of command who may be outside or third-party contractors.</i>	
Training – delivery of training courses in a formalised learning environment. <i>This means people managed by the job holder in relation to the job holder's role as a formal Teacher or Instructor.</i>	<b>Incumbent is responsible for briefing Executive Staff on COPEG Financial Status on a recurring basis. Executive team comprised of two General Directors, two Administrative Directors, and eight Commissioners.</b>

<p>Work allocation – eg daily work guidance/supervision. <i>Consider the job holder's role in giving out work assignments, or giving daily instructions to others, but for whom the job holder does NOT have full supervisory responsibility. Example: Team Leader or Work Leader role</i></p>	
------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	--

*Interviewer's notes*

**3.1 Other resources**

**For each of the following headings, indicate the type of resources controlled by the position and the nature of that control. Give some indication of overall value for each basic category (or scale of the resource in the case of information).**

<p>Equipment – personal use, repair and maintenance, security, safety, purchase decision, etc <i>Consider tools and equipment, including PCs. Define what the job holder does with the equipment (i.e. user, repairer, purchaser, etc.)</i></p>	<p><b>Responsible for APHIS info management equipment in the amount of approx US\$10,000 as well as COPEG assets assigned to the Finance Department in the amount of over US\$50,000</b></p>
<p>Expendable supplies – issue/receive, determine supplies levels, purchase supplies, etc <i>Consider office supplies or other work supplies, the way in which the job holder deals with them. Estimate the value of goods held at any one time. Example:” orders monthly office supplies of \$250 per month”</i></p>	
<p>Buildings/land – security, maintenance/refurbishment, sell/purchase decision, etc</p>	
<p>Financial matters – handling cash, formulating, monitoring or managing budgets, etc. <i>Consider the role of the job holder with respect to cash, funds, budgets or accounts. Define the role and the amounts involved.</i></p>	<p><b>Incumbent is responsible for formulation, distribution, and execution of annual COPEG budgets in the amount of approx. US\$17 millions. Certifies budget availability contracts and purchase orders required for facility and field daily operations and/or contingencies.</b></p>
<p>Information – upkeep, access/security, management of information resource, etc. <i>Consider the job holder's responsibility for files, databases, records or controllable information items. Provide examples of the type and volume of information resources used, maintained or managed.</i></p>	<p><b>Responsible for the accuracy, maintenance, and safeguarding of COPEG financial records as well as back up documentation availability for any required audits/reviews.</b></p>
<p>Contracted out goods and services – contract support, management, negotiation, etc. <i>Does the job holder have a responsibility for contracted out (outsourced) goods and</i></p>	<p><b>Responsible for managing Department budget and determine/prioritize purchases to take care of needs (goods or services) identified within the</b></p>

services. Define the role responsibility and the amount involved. Example: Serves as COTR for window cleaning service contract.	section.
---------------------------------------------------------------------------------------------------------------------------------	----------

*Interviewer's notes*

**3.3 Freedom to Act**

**Indicate the job holder's responsibility to plan work, resolve problems, make decisions, etc.**

<p>Discretion over own work and work of others.</p> <p><i>Consider the job holder's freedom to adjust daily work or to plan work over period of days; whether he/she can amend existing practices; plan the work of others; liaison with external organizations; can veto actions of others.</i></p>	<p><b>He/she has the freedom to adjust daily work not only for him/herself but for the whole Department staff. These adjustments are necessary to fulfill Department's mission and be able to deal with unforeseen cases.</b></p>
<p>Discretion to resolve problems and/or situations.</p> <p><i>Consider the job holder's autonomy to resolve problems, e.g., needs to check with supervisor, resolves problems without assistance, resolves unusual problems referred by others.</i></p> <p><i>Give specific examples.</i></p>	<p><b>Incumbent is fully responsible for resolving problems related to financial matters within the COPEG organization and leading the Department staff toward unusual problems solutions in order to ensure COPEG continuous and smooth operations.</b></p> <p><b>Examples: last minute payments, budget adjustments for contingencies, etc.</b></p>
<p>Non-routine or special projects.</p> <p><i>Consider well-defined projects for which job holder is responsible. Indicate length of project and number of staff involved.</i></p>	<p><b>Incumbent is required to participate in committees to evaluate and resolve problems that affect the administrative processes. These activities might last days, weeks, or months.</b></p>

<p>Operational decisions.</p> <p><i>Consider the job holder's responsibility to determine and/or identify significant changes to key operations of the organization. Provide specific examples of how they affect Mission policy or strategy.</i></p> <p><i>This is a very high level of responsibility and not common in many positions. Do not include just giving advice or recommendations, which is covered elsewhere.</i></p>	<p><b>He/she is expected to contribute with ideas for a continuous improvement process within the administrative arena and communicate to executive members about process disruptions as well as possible corrective actions.</b></p> <p><b>Incumbent is expected to understand COPEG's policy and procedures, and provide guidance and assistance in making operational changes to the procedures.</b></p>
-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

*Interviewer's notes*

**3.4 Advice / recommendations**

**If the position is required to provide advice to others inside or outside of the organization, please indicate the type of advice given and the recipients. Consider advice and recommendation that the job holder is responsible for providing to subordinates, colleagues, clients or management. Provide good examples of the kind of advice and recommendations that are required of the job holder on a regular basis.**

**Advice is expected from incumbent at different levels. Advice might be required by subordinates on daily accounting operations (example: defining correct transaction codes, defining adequate financial reports for the executive staff including data presentation and format used) or executive staff on financial status and how to face unforeseen or non-budgeted initiatives. (example: provide funding alternatives for unforeseen expenses like utilities cost increase or major projects).**

*Interviewer's notes*

**3.5 Impact** Determine who is affected by the work of the job holder—individuals or organizations—both internally and outside of the organization, and explain in which way. Also consider external individuals or organizations, particular sectors, external groups or clients that are key to the Mission, etc.

<p>Impact on internal organization.</p> <p><i>Define effect on, e.g., the job holder's own work area, the work area of others, the organization as a whole, the organization on a country wide, a regional or worldwide level.</i></p> <p><i>Provide specific examples.</i></p>	<p>Since this position has no counterpart on the Panamanian team, his/her performance has a critical impact on the whole Commission (COPEG).</p> <p>The financial health of COPEG is critical to the programs health. As such, this position is of extreme value to the organization functions, and management.</p>
<p>Impact on external relations.</p> <p><i>Consider the job holder's ability to shape the organization's dealings with external contacts, e.g., none or limited; impact on a small proportion of the organization's contacts, particular external group(s); a country-wide/regional, definitive impact on U.S. external image.</i></p> <p><i>Provide specific examples.</i></p>	<p>Being USDA-APHIS-IS the representative of United States interest in this program, incumbent's ability will reflect upon US performance as part of this bilateral organization.</p>

***Interviewer's notes***

#### 4. Knowledge

Consider the essential education, training, experience and skills that a person must possess in order to do the job. This may be different from those that the incumbent actually possesses. *Think about the "know-how" requirements as if the position were undergoing recruitment. Consider the minimum requirements to perform job duties at a fully successful level.*

<p>Knowledge of the organization, external environment and/or specialist field <i>1. What does the job holder have to know about the agency/Mission/Section? 2. What does the job holder have to know about the host country/region? 3. What kind of subject matter knowledge is required, independent of internal procedures or USG policies?</i></p>	<p><b>Must be knowledgeable of agency administrative policies and regulations as well as COPEG mission and goals. Must be fully trained on accounting and budget matters in order to lead the Department in accordance with applicable rules and regulations.</b></p>
<p>Education <i>The minimum academic requirement, include the level and the type.</i></p>	<p><b>4-yr undergraduate degree in Administration,</b></p>

<p><i>Examples: Completion of secondary schooling in general studies; Bachelors Degree in Nursing</i></p>	<p><b>Accounting, Finance, or related fields.</b></p>
<p>Training / membership of professional body <i>What kind of occupational training is required? Include specialized job training. Examples: safe driver training, word processing training, software applications training, procedural training (Consular or Admin training), cashier training, etc.</i></p>	<p><b>Plus, a Certified Public Accountant (CPA) valid license is required.</b></p>
<p>Previous experience <i>Specify the minimum months or years of prior job-related experience, and the type of experience. Examples: 3 years trades and crafts; 5 years accounting; 1 year general clerical, etc. If prior supervisory experience is required, specify the minimum number of months/years required that is beyond job related experience: Example: 1 year previous supervisory experience in addition to 3 years journeyman level experience.</i></p>	<p><b>Eight years of related experience.</b></p>
<p>Language and other essential skills <i>Specify the minimum host country language and English language requirements in order to perform job tasks at fully successful level. Level 1: Rudimentary; Level 2: Limited Knowledge; Level 3: Good working knowledge; Level 4: Fluent; Level 5: Credentialed Professional Translator/Interpreter</i></p>	<p><b>English level 4</b> <b>Spanish level 4</b></p>

**Interviewer's notes**

## 5. Intellectual skills

Considers the extent to which the position demands the analysis and evaluation of information in order to formulate conclusions, ideas or judgements. Please indicate the types of problems the position has to solve, the degree of future planning required and the need for innovation. Please provide examples.

<p>Problem solving. <i>Identify the typical problems that the job holder is expected to resolve independently. Provide examples of most common problems solved by job holder regularly, and an example of most difficult problem solved.</i></p>	<p><b>Must be able to resolve minor and major problems within the Department as well as advising Directors on possible solutions for funding constrains.</b></p> <p><b>Most common problems solved might be related to payments to sources or employees, miscoding transactions in the accounting system, expediting payments for local and international sources, <u>provide alternative funding for emergency purchases.</u></b></p>
<p>Planning ahead <i>Think about the job</i></p>	<p><b>Incumbent must plan his/her work with at least a week</b></p>

<p><i>holder's work horizon, i.e. how far in advance the job holder must plan his/her own activities?. Example: "The technician plans own work at least 3 days in advance; The Accounting Chief must plan the work unit tasks at least quarterly"</i></p>	<p><b>in advance. Some projects, like budget formulation and financial status reports or commissioner's meeting presentations must be coordinated weeks or months in advance in order to meet deadlines.</b></p>
<p><i>Innovation. Think about the opportunity and/or need to develop new approaches, procedures, designs, plans, guidelines. Examples: "must design new configurations for LAN"; "must adapt agency regs into internal SOPs"</i></p>	<p><b>Incumbent is fully responsible for suggesting improvements in processes that affect normal Department's operations. Must work toward adopting better practices into COPEG internal operating procedures and norms.</b></p>

*Interviewer's notes*

## 6. Communications

**6.1 Contacts** Consider who the position communicates with, both within and outside of the organization, and the nature of the communication. For each key contact, please indicate the purpose of the contact and the type of information communicated.

a. Internal contacts

If contacts are at different levels (low-mid-high), indicate purpose of contact for each level. For instance, to make appointments, provide information and/or advice, discuss, negotiate...

**High - Job holder must maintain excellent contacts and relationships with COPEG General Directors (Panama and US) as well as all Directors within the COPEG organizational structure. Deals with IS HQ (Riverdale, MD) personnel on funding matters.**

**Med – Deals with other mid level staff from all departments and sections within the organization. Deals with US Embassy staff especially in Admin, FM, and GSO sections. USDA and other related sister agencies (FAS, FSIS, etc).**

**Low – Deals with any other COPEG employee involves in any financial issues if required.**

b. External contacts

If contacts are at different levels (low-mid-high), indicate purpose of contact for each level. For instance, to make appointments, provide information and/or advice, discuss, negotiate...

Mid – Deals with local and/or international sources on payment status, statements reviews, etc.

*Interviewer's notes*

**6.2 Oral Communication** Identify if any specialized oral communication skills are required. *For instance, counsels victims of assault; refers callers to offices; delivers speeches to conferences; explains scientific data to non-experts; interviews claimants for benefits; calms down agitated customers.*

**Deliver speeches to COPEG Executive staff meetings whenever necessary. Explain financial data to attendees. Train administrative staff on budget formulation and execution guidelines.**

*Interviewer's notes*

**6.3 Written Communication** Give an indication of the complexity of written communication skills required of the job holder. *For instance, completing pre-formatted letters or forms; straightforward or routine letters, e-mails, reports, etc.; non-standard, original-thought correspondence; highly complex, one-time documents dealing with technical, conceptual, policy or other complex subject matters.*

**Must prepare, explain, and/or justify financial reports and statements that reflect financial situation in COPEG.**

*Interviewer's notes*

## 7. Environment

Considers the physical environment in which the job holder operates. It also considers any job related physical or psychological demands. Identify any job-related particular hazards that exist. Please be specific, including frequency and/or duration where appropriate.

Job location. <i>Identify the primary location of the work, and any secondary locations.</i>	<b>Primary location is the COEPG Sterile Fly Rearing facility at Pacora, Panama.</b>  <b>Routine visits might be required at the US Embassy compound, Clayton, Panama.</b>
Potential job related hazards. <i>Exclude hazards that may apply to all staff in the country/city.</i>	
Physical demands or Psychological demands. <i>Examples: heavy lifting; repetitive work; job related mental stress.</i>	<b>Must be able to work long hours if required.</b>
Unusual work pattern demands – frequent travel, working away from duty station, rotating shift work, etc	<b>Might be required to work after duty hours if emergency arises.</b>

*Interviewer's notes*

## 8. Other

Are there any other features of the position which should be noted?

*Interviewer's notes*

