Position Information

Internal Team:* SL-CSM-Biological Sciences-115100
Job Code/Employee Classification:* Admin Analyst/Spclst 12 Mo

MPP Job Code:
Position Number:

CSU Working Title:* Biological Sciences Budget Analyst
Reports To: Dept Chair - Bio Sciences
Campus:* San Luis Obispo
Division:* Academic Affairs-Provost
College/Program:* CSM-College of Science & Math
Department:* CSM-Biological Sciences - 115100

FLSA Status:* Non-Exempt

Sensitive Position:

Job Summary/Basic Function:* The Biological Sciences Department is the largest academic unit within the College of Science and Mathematics and is one of the largest departments at Cal Poly. There are approximately 900 undergraduate students and 50 graduate students. The department's mission is three-fold: 1) offer majors leading to a Bachelor of Science degree in Biological Sciences, Marine Science, or Microbiology; 2) offer courses to satisfy the biology requirements for other majors; and 3) offer courses to meet general education and breadth requirements for Cal Poly's entire student population. The department offers approximately 125 different courses to over 10,000 students annually, with the majority of courses having a laboratory component. The department is currently comprised of an elected department chair (3 year term), 32 full-time faculty, 2 full-time lectures, 35-40 part-time faculty/teaching associates, approximately 25 student assistants, and 10 support staff of which 4 provide administrative support and 6 support classroom and research endeavors. Budgets within the department include an annual operating allocation up to $230,000, as well as several hundred thousand dollars of other university support. Faculty research grants have totaled almost 7 million dollars over the past 5 years.

Working independently under general supervision of the Department Chair, this position is the department resource responsible for supporting and providing guidance in the areas of budget and fiscal operations, including but not limited to: create budget projections, prepare detailed reports, and implement procedures using sound judgment and a thorough working knowledge of accounting, utilizing campus systems and practices. The position also administers procurement of general and technical/scientific supplies and equipment used in teaching laboratories and for faculty and student research.

Minimum Qualifications:* Education AND Experience: Entry to this classification requires general knowledge and skills in the applicable administrative and/or program field with a foundational knowledge of public administration principles, practices, and methods. This foundation would normally be obtained through a bachelor's degree and/or equivalent training and administrative work experience involving study, analysis, and/or evaluation leading to the development or improvement of administrative policies, procedures, practices, or programs.
Required Qualifications:

- Knowledge of or the ability to quickly learn College, University, and CSU policies and procedures; Cal Poly Campus Administrative Policies (CAP), Campus Administrative Manual (CAM); Collective Bargaining Agreements; Executive Orders and Coded Memoranda.
- Knowledge of principles, problems, and methods of administration, operations, and fiscal management.
- Demonstrated experience working with budgetary data; experience managing multiple accounts preferred.
- Ability to organize, anticipate, analyze, prioritize, and manage many diverse and complex tasks, using sound judgment and ensure that deadlines and college and university needs are met.
- Working knowledge of budget policies and procedures.
- Ability to learn, interpret and apply a wide variety of policies and procedures and apply to complex programs and situations. Knowledge of, or the ability to quickly learn, various campus, CSU, and state policies and procedures, and faculty and staff contracts.
- Knowledge in administrative techniques, operations, and basic research and statistical methods. Ability to analyze and interpret results to develop sound conclusions and recommend new or revised policies and make decisions.
- Demonstrated ability to analyze financial data and make accurate projections using business mathematics.
- Ability to understand problems from a broad, interactive perspective and discern applicable underlying principles to conceive of and develop strategic solutions.
- Demonstrated ability to work with a wide variety of campus, public and private entities and handle potentially sensitive situations.
- Proficiency in spreadsheets; databases; word processing; on-line systems, email and calendars; and ability to adapt to changing technology.
- Outstanding written and communication skills. Ability to effectively present ideas and concepts in written or presentation format and use consultative and facilitation skills to gain consensus.
- Ability to train others by effectively imparting technical and legal knowledge on policies and procedures in a way that is understandable to administration, faculty, staff, students and general public.
- Demonstrated ability to foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere.
- Demonstrated ability to work with a diverse faculty, staff, students, and the public and maintain a cordial and positive environment.
- Ability to learn and adapt to constantly changing technology, policies, and procedures.
- Demonstrated ability to work independently to organize and plan work, including handling multiple priorities.
- Demonstrated ability to maintain a high degree of confidentiality.

Preferred Qualifications:

- Experience in budget or fiscal management
- Experience with Excel, Word, PeopleSoft (Finance, Human Resources and Student Administration), and Dashboards is preferred.
- Experience in purchasing scientific supplies and equipment.
- Ability to read and understand technical manuals and product literature.

Special Conditions:

- Ability to work with computer keyboard and mouse to enter, manipulate, and retrieve data.
- Ability to work in a busy office environment where there are constant interruptions and noise due to multiple conversations of students, faculty, and staff.
- May be required to work additional/variable hours to complete work during peak times.
- This position classification has been defined as non-exempt and is subject to overtime provisions of the Fair Labor Standards Act (FLSA).

License / Certification:

N/A

Mandated Reporter:*

Limited - The person holding this position is considered a limited mandated reporter under the California Child Abuse and Neglect Reporting Act and is required to comply with the requirements set forth in CSU Executive Order 1083, revised July 21, 2017.

NCAA:  Yes  No

Conflict of Interest:*

None

Supervises Employees:*

Yes  No

Job Duties

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<th>% of time</th>
<th>Duties / Responsibilities</th>
<th>Essential / Marginal</th>
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• Administer the day-to-day fiscal operations of the Biological Sciences Department, including: develop and recommend short- and long-term purchasing plans; and research and procure a wide variety of general and technical/scientific supplies and equipment for department use.

• Responsible for department’s day-to-day fiscal accountability; project monthly and annual expenditures on an on-going basis to stay within allocations.

• Oversee and approve expenditures from department's budget up to $650,000 consisting of general operating fund ($250,000), College-Based Fee fund (up to $150,000), Frost fund support (up to $100,000), and Foundation/Corporation funds ($130,000), as well as multiple faculty grants in the amount of up to $2 million. Full signature authority on all State accounts, Foundation/Corporation discretionary fund, and several Foundation/Corporation grants, restricted funds, and special accounts.

• Develop plans to allocate and expend resources from individual funds to maximize resources and meet the short- and long-term goals of the department.

• Research, analyze, and evaluate financial information to project department needs and spending trends. Working in consultation with the Department Chair and/or area advisory committees, develop a working budget and formalize allocation of resources to specific program areas.

• Serve as a member of the Fiscal Affairs Committee. Provide technical resource data to the committee (i.e., projections, trends, and forecast of department needs).

• Acquire general and technical/scientific supplies, equipment and services. Identify suitable vendors, obtain quotes, and complete procurement transactions by purchase requisition, direct pay or credit card.

• Independently request creation of new financial accounts within PeopleSoft as needed for accountability and new grants.

• Act as department resource to department chair, faculty, staff, and students to provide information regarding current department and university policies and procedures related to use of funds and acquisition of equipment and supplies.

• Develop, design, create, and maintain detailed spreadsheets of expenditure accounts for all category expenditures (e.g., classroom supplies, equipment, field trips, student projects, student salaries, travel, and grants).

• Interpret State, university, college, department, and Foundation/Corporation policies and procedures regarding fiscal issues; apply this knowledge with authority on a continuing basis.

• Review all College Based Fee and Frost fund requests for compliance with department, college, and university use guidelines. Monitor, track, and process all faculty and student reimbursements, and prepare financial data for use by department faculty and College Based Fee committees.

• Enroll student assistants in university payroll system and track expenditures to ensure allocations are not exceeded. Serve as timekeeper for student assistants and approve monthly payroll. Prepare monthly and ad hoc reports for distribution to department faculty, collection curators, and other appropriate department individuals or groups.

• Responsible for establishing and revising department budget/fiscal procedures and deadlines.

• Reconcile and monitor department, State and Foundation/Corporation budgets using on-line financial systems and related repotting tools to ensure accuracy; resolve discrepancies with all levels of fiscal offices.

• Independently prepare budget and/or expenditure transfers.

• Research and compile historical and comparative budget data and prepare reports, including responses to college and university requests and department internal and external reviews.

• Verify Procurement Card purchases of up to $500,000 annually.

• Reconcile with vendors issues of missing, delayed, or damaged merchandise.

• Initiate and approve all direct disbursements and reimbursements.

• Advise, consult and train other personnel on current fiscal policies and processes

• Attend training and maintain skill currency as appropriate to safely and effectively complete assignments

• Perform other duties, special projects, and analyses deemed necessary or as requested by department chair or faculty

• Provide backup for department office personnel, when necessary

• Other duties as assigned