<table>
<thead>
<tr>
<th>Position</th>
<th>Financial Manager</th>
</tr>
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<td>SL-FacMgmt-FMD Cust&amp;Business Svc-127902</td>
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<td>San Luis Obispo</td>
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<td>Administration and Finance</td>
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<td>College/Program:*</td>
<td>Facilities Management and Dev</td>
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<td>Sensitive Position:</td>
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<tr>
<td>Minimum Qualifications:*</td>
<td>Bachelor’s Degree from a four year accredited college or university AND five (5) years of progressively responsible experience in the area of financial management with direct responsibility for budget and financial oversight.</td>
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</table>
**Required Qualifications:**

Demonstrated skill in fiscal analysis, budget organization, planning, and administration.

Thorough knowledge of basic principles of accounting and financial management; and a general knowledge of business system applications and software, including standalone systems and enterprise-scale technologies.

Demonstrated ability to effectively supervise and manage others, including delegation of work assignments and problem resolution.

Demonstrated knowledge of a wide range of effective business practices, including but not limited to base budget and annual operating plan, budget and accounting, and financial systems.

Demonstrated experience identifying areas of improvement based on department needs, changes in policy, regulations, Federal and State statutes, etc.; and the ability to provide recommendations for improvement to existing processes and procedures to provide continual improvement in financial operations for the department and University.

Ability to maintain high quality/standards of work, leadership, ethics, commitment, and professional responsibility and judgment; and ability to represent the University and its interests in a professional and conscientious manner.

Ability to independently interpret, explain, and apply a variety of complex statutes, regulations, codes, collective bargaining provisions, policies and procedures.

Demonstrated ability to comprehend financial reports prepared in accordance with Generally Accepted Accounting Principles (GAAP).

Strong analytical reasoning and problem solving skills including the ability to gather, interpret, and assess information/data from a variety of sources in support of recommendations; and the ability to formulate well-reasoned courses of action to solutions to complex problems.

Ability to take initiative, anticipate problems, and solving issues in an imaginative, thorough, and practical timely manner.

Ability to assess opportunities for and integrate technology into work environments to increase effectiveness, efficiency, and communication.

Excellent communication skills; ability to effectively communicate complex information in a clear and understandable manner to a diverse audience, both verbally and in writing; and demonstrated skill in training/instructing others.

Demonstrated ability to exercise tact, sound judgment, diplomacy and discretion to effectively handle a broad range of high level, sensitive situations and confidential information and data, and to respond appropriately to conflicts and problems.

Ability to initiate, establish, and foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in and outside the University with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds.

Excellent organizational and time management skills with the ability to set own priorities to coordinate multiple assignments with fluctuating, overlapping and time-sensitive deadlines with a high level of detail and accuracy.

Demonstrated customer service experience requiring a very high level of diplomacy and professionalism.

Excellent computer skills and proficiency with a variety of computer applications including word-processing, spreadsheets, databases, presentation software, on-line systems, Internet as well as online calendaring and email.

Working knowledge of or ability to quickly learn University infrastructure, policies and procedures.
Preferred Qualifications:

Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.

Management and budgetary experience in higher education setting, preferably in a large unionized public or private organization.

Knowledge of state governmental regulations and public policy.

Knowledge of the State of California budget structure as it specifically relates to the CSU; and an understanding of the State Budget Act.

Knowledge of CSU policies, state statutes, regulations, and codes under which the CSU operates.

Experience working with relational databases such as PeopleSoft and Oracle Dashboards.

Special Conditions:

Must be willing to travel and attend training programs off-site for occasional professional development.

Must be able to work overtime, occasional holidays, and adjust working hours to meet special jobs. May be called back periodically to perform work as needed on an emergency basis.

The person holding this position is considered a '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 as a condition of employment.

Must be able to successfully pass a pre-employment background/fingerprint check.

Full-time MPP employees are required to disclose outside employment at time of hire or within 30 days of taking additional outside employment subsequent to time of hire.

This position classification has been defined as "Exempt" and is not subject to the 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

JOB DUTIES

% of time Duties / Responsibilities Essential / Marginal
Analysis of the recharge reimbursement component.

Use judgment, ingenuity, and innovation to develop processes and conceive of new approaches and solutions for business processes and to address problems and issues associated with providing planning, analysis, and administrative support to Facilities employees with budgetary responsibility.

Hire, lead, and develop high-performing direct reports to achieve identified strategies and daily operational effectiveness. Provide frequent feedback regarding performance and progress on established goals and objectives.

Assist with FMD budget development for all departments.

Work with the CBS Director and CBS’s Training and Personnel Manager to verify all FMD centralized salary and benefits and budgeted for the FMD departments and communicate with management if requesting a change or completing a recruitment.

In coordination with the CBS Director, CBS’s Training and Personnel Manager, and Budget and Finance, to analyze and maintain the position number inventory.

With the guidance of the CBS Director, create and distribute monthly financial reports and review with FMD management.

Review, analyze, approve, and forecast various departmental expenses.

Distribute budget by funds and accounts according to State University Administrative Manual (SUAM) and Facilities Information and Resources Management System (FIRMS).

Analyze the proposed project expenses, contingencies, project time frame, and projections.

Reconcile and approve project expenses.

Review project schedules to determine if any modifications to the applicable budget cycle.

Complete a project expense and projection review with the Project Manager and the Executive Director of Facilities Planning and Capital Projects.

Develop and maintain the Project Statement of Finance for the Senior Vice President of Administration and Finance, the Associate Vice President for Facilities Management and Development, and the Director of Customer and Business Services.

Provide training and support to management and supervisory staff regarding purchasing methods for contracts, services, equipment, and supplies purchases (Joint Operations Center (JOC), Technical Operations Support Activity (TOSA), Standard Bid, Purchase Requisition, Direct Buy), using SUAM and State purchasing requirements.

Provide training and support to Facilities financial users on policies, procedures, and systems. As needed update the applicable financial policies and procedures to ensure compliance with applicable regulations and procedures.

Provide training and support to campus technicians and departmental Budget Specialists on the Group II (project furniture and fixtures) process.

Provide accountability for FMD with the implementation and support of the FMD informational systems as it relates to the financial operations of minor and major capital projects, work hours, and labor hours.

Annual APPA Facilities Performance Indicators

Annual Sightlines facilities audit

Recharge and overhead rate studies

Public requests for information
Job Summary
Under the general direction of the Director of Customer and Business Services (CBS), the incumbent will serve as a resource for Facilities directors, managers, associate and assistant directors in administering and oversight of a comprehensive budget development program, financial policies, reporting, and training, and fiscal leadership for Major and Minor Capital Outlay projects. This position will interface closely with campus Budget and Finance, Strategic Business Services, and Fiscal Services to assure consistent application of CSU/University policies, procedures, and practices, and compliance with collective bargaining agreements.

Department Summary
Facilities Management and Development (FMD), a unit within the Administration and Finance Division (AFD), is responsible for the planning, design, construction, operations, maintenance, and repair of university facilities and grounds. FMD consists of five critical and interdependent support departments, including Facilities Customer & Business Services; Energy, Utilities, & Sustainability; Environmental Health & Safety; Facilities Planning & Capital Projects; and Facility Operations. In support of the Cal Poly mission, the Facilities and Management and Development department is committed to promoting a culture that values individual and organizational integrity, civility, and diversity.

Key Qualifications
- Demonstrated skill in fiscal analysis, budget organization, planning, and administration.
- Thorough knowledge of basic principles of accounting and financial management; and a general knowledge of business system applications and software, including standalone systems and enterprise-scale technologies.
- Demonstrated ability to effectively supervise and manage others, including delegation of work assignments and problem resolution.
- Demonstrated knowledge of a wide range of effective business practices, including but not limited to base budget and annual operating plan, budget and accounting, and financial systems.
- Demonstrated experience identifying areas of improvement based on department needs, changes in policy, regulations, Federal and State statutes, etc.; and the ability to provide recommendations for improvement to existing processes and procedures to provide continual improvement in financial operations for the department and University.
- Ability to maintain high quality/standards of work, leadership, ethics, commitment, and professional responsibility and judgment; and ability to represent the University and its interests in a professional and conscientious manner.

Education and Experience
Bachelor’s Degree from a four year accredited college or university AND five (5) years of progressively responsible experience in the area of financial management with direct responsibility for budget and financial oversight.

Salary:
Commensurate with education and experience.
Cal Poly

Known for its Learn by Doing pedagogy, Cal Poly is the flagship of the world-renowned California State University system. Annually recognized as one of the top public universities in the nation, Cal Poly continues to offer an academic curriculum based on learned experience gained through real-world practice. Located in San Luis Obispo, Cal Poly is nestled comfortably among the coastal foothills, minutes from the Pacific Ocean and equidistant to the Bay Area and Los Angeles.

Cal Poly offers a best-in-class benefits program, including health, dental and vision insurance, retirement participation in the Public Employees’ Retirement System, and educational benefits for eligible employees. See our benefits website for additional information.

Diversity Statement

At Cal Poly, we believe that cultivating an environment that embraces and promotes diversity is fundamental to the success of our students, our employees and our community. Bringing people together from different backgrounds, experiences and value systems fosters the innovative and creative thinking that exemplifies Cal Poly’s values of free inquiry, cultural and intellectual diversity, mutual respect, civic engagement, and social and environmental responsibility.

Cal Poly’s commitment to diversity informs our efforts in recruitment, hiring and retention. California Poly is an affirmative action/equal opportunity employer.

Supplemental Information

Following a conditional offer of employment, a background check (including a criminal records check) must be completed satisfactorily before any candidate may start work with Cal Poly. Failure to satisfactorily complete the background check may result in the withdrawal of the offer of employment. Current employees who are offered positions on campus will be required to undergo a background check for any position where a background check is required by law or that Cal Poly has designated as sensitive.

The person holding this position is considered a ‘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 as a condition of employment.

This position may be “Designated” under California State University’s Conflict of Interest Code. This would require the filing of a Statement of Economic Interest on an annual basis and the completion of training within 6 months of assuming office and every 2 years thereafter.

Cal Poly, San Luis Obispo is not a sponsoring agency for staff positions (i.e. H-1B visas).

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**USERS AND APPROVALS**

Justification for Position:

For all positions, please summarize the following points for budget and senior leader review. Please note, this information is required; and requests will be returned if not completed:

Business Need: What operational or strategic goals will this role support? What are the consequences of not filling it?

Impact on Operations: What are the anticipated benefits to business operations (i.e. enable greater customer service focus, decrease backlog, serve students more efficiently, etc.)?

Anticipated Cost: What is the overall cost for the role (include base salary range + average benefit cost, advertising, relocation, and hiring bonus, if applicable)?

Budget Analysis: How is this position to be funded? If funded from current departmental operating funds, please indicate if department has sufficient budget to support the hire.

Changes to Position: For existing positions, list changes (if any) you are making to this position number (i.e. change to classification, time basis, reports-to, etc.):

Additional information for new MPPs:

Please attach an organizational chart in the Documents tab above.