A. POSITION DESCRIPTION

Incumbent: Vacant/Recruitment
EmplID: __________ Date: __________

Working Title: Student Organization Financial Coordinator
Work Direction Given By: Senior Director, SLL & Rec Sports
(Lead)

Department: Student Life & Leadership
Reports To Title: Senior Director, SLL & Rec Sports
(Adequate Administrator)

Division: Student Affairs
College (if applicable):
Reason:
☒ Vacant Position ☐ Classification Review / In Range Progression ☐ Revision ☐ Performance Evaluation ☒ New Hire

Is this a new position? No

Classification Title: Administrative Analyst/Specialist NE 12/12
Job Code: 1038

Position Number: 00006719
Level/Range/Grade: 1

FLSA Code: ☐ Exempt ☒ Non-Exempt

Time Base: 1.00 Check box if Intermittent

Pay Plan: ☒ 10/12 month ☐ 11/12 month ☒ 12/12 month

CBU/MOU: R09-Technical CSUEU

B. POSITION PURPOSE

Working independently, under general supervision, this position is responsible for the day-to-day financial administration of university recognized student clubs and organizations. Responsibilities include participating and leading trainings/orientations of student club officers and faculty members on financially related transactions and requests, representing Student Financial Services (SFIn) with various orientations and promotional events, communicating with faculty/staff advisors, working diligently with the Student Life and Leadership (SLL) Office, understanding CSU policies and procedures. This position will be responsible for recommending updates to procedures, processes and forms to efficiently manage the financial transactions for student clubs and organizations. Advise student officers to effectively manage club and organization funds to promote personal financial growth. Work with Financial Accounting and Reporting (FAR) on ledger discrepancies, reconciliations and tax reporting.

SPECIAL REQUIREMENTS OF POSITION:
This position as set forth in CSU Executive Order 1083, revised July 21, 2017 is not designated as a required mandated reporter under the California Child Abuse and Neglect Reporting Act.

California State University, Chico, in accordance with CSU policy, requires that the successful candidate complete a background check (including a criminal records check, sexual offender registry check, and/or fingerprinting) prior to assuming this position. Failure to satisfactorily complete or pass the background check may impact the job offer or continued employment of current CSU employees who apply for posted positions identified as sensitive. This position is considered a sensitive position based on CSU guidelines.

The duties of this position will include participation in a decision that may have a material/financial benefit to the incumbent. Therefore, this is a "designated position" under the California State University's Conflict of Interest Code and the incumbent will be required to file a Form 700: Statement of Economic Interest and is subject to the regulations of the Fair Political Practices Commission. (Group/Category: Procurement Card Holder, 2) Note this designation is applicable only if Procurement Card is issued.
C. ESSENTIAL FUNCTIONS AND RESPONSIBILITIES

"NOTE: This Position Description is intended to give an overview of the essential job functions, the general supplemental functions and the essential requirements for the performance of this job. It is not an exhaustive list of all duties and responsibilities of this positions. Other functions consistent with your Classification Standards may be assigned as deemed necessary."

Does this position include Work Lead Responsibilities? No

<table>
<thead>
<tr>
<th>List Functional Category with Responsibilities:</th>
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<tbody>
<tr>
<td>STUDENT SUPPORT &amp; ADVISING:</td>
</tr>
<tr>
<td>* Advises student officers on how to establish a student organization/club fund, cash handling, depositing funds and how funds can be expended.</td>
</tr>
<tr>
<td>* Exercises a high degree of initiative and judgment in the administration of student organization/club funds and independently assesses business practices for continuous improvement to enhance the student organization/club experience.</td>
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<tr>
<td>* Serves as the primary financial contact and liaison with students, advisors, SLL staff in diverse situations.</td>
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<tr>
<td>* Responsible for communication of irregularities, suspicious activities, or other issues to SLL and work with them to provide financial literacy training, and support to officers of student clubs.</td>
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<tr>
<td>* Participates in the implementation, and training of student organization leaders relevant to campus procedures and policies.</td>
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<tr>
<td>* Advocates on behalf student officers the financial needs and support for their groups.</td>
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<tr>
<td>* Participates in the development, and implementation, of student organization advisor training.</td>
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<tr>
<td>Contributes to the financial literacy learning experience of fund management.</td>
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<tr>
<td>* Guides and advises student officers in organization management, event planning, and application for campus resources. Assists students to think through their events and problems to select suitable solutions.</td>
</tr>
<tr>
<td>* Functions as liaison to specific campus offices such as Facilities Reservations, Facilities Maintenance Services and Risk Management in relation to facility use and permits for student organization generated activities.</td>
</tr>
<tr>
<td>* Assists student organization/club with donations and fundraising activity. Works with University Advancement to appropriately record donations and provide donor receipt information.</td>
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<tr>
<td>* Be proactive on emerging trends and seasons for student club and organizations and anticipate their financial needs or questions.</td>
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<tr>
<td>* Recommends changes in policies and procedures affecting the administration of student organization/club's financial transactions.</td>
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<tr>
<td>* Oversees cases that require student intervention related to processing financial transactions and work with SLL Director on resolution.</td>
</tr>
<tr>
<td>* Represents SLL at various campus events, receptions and fairs related to student organizations and clubs.</td>
</tr>
</tbody>
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| % of Time |
|------------------|------------------|
| 35% | Priority Weight |

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<thead>
<tr>
<th>FINANCIAL ADMINISTRATION &amp; OVERSIGHT:</th>
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<tbody>
<tr>
<td>* Primarily responsible for the financial transactions and financial health of the student clubs and organization funds.</td>
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<tr>
<td>* Reviews student club/organization deposits for completeness, accuracy, sales tax applicability, donations, UBIT (unrelated business income tax), etc.</td>
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<tr>
<td>* Ensures deposits are accurate and correctly processed with appropriate backup documentation.</td>
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<tr>
<td>* Works closely with university cashiering to maintain efficiencies and compliance to cash handling for student organization/club.</td>
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<tr>
<td>* Reviews reimbursement and cash advance requests from student organization/club for accuracy, valid transactions, appropriate signature authority and sufficient cash balances. Follows up with club advisor and/or SLL in the event of a discrepancy. If appropriate correct issue immediately so students can be reimbursed timely.</td>
</tr>
<tr>
<td>* Assists student organization/club with cash box and cash advance requests.</td>
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<tr>
<td>* Provides final approval for financial transactions from student organization/club funds.</td>
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<tr>
<td>* Prepares and work with student officers for service oriented payments via the campus purchase order process, and/or appropriate use of the campus procurement card.</td>
</tr>
<tr>
<td>* Assists student organization/club with travel preparation (hotel accommodations, airline tickets, etc.).</td>
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</tbody>
</table>
| * Establishes and removes PeopleSoft Student Center holds on student accounts if students fail to
List Functional Category with Responsibilities:

- Provide support documentation for cash advances.
- Collects new student organization/club forms yearly (or as updated), reviews and requests fund set up as needed with FAR.
- Creates and provides Ad Hoc financial reports to student organization/club officers, advisors, and other interested parties.
- Reviews student club and organization negative balances, abnormal balances, and works with FAR on reconciliation issues. Communicates with student club and organization, SLL as necessary.
- Performs yearly review of funds for inactivity, and based on campus procedures, deactivates accounts and initiates transfer of balances.
- Coordinates with University Advancement for any designated donations to student club and organizations.

TRAINING AND ORIENTATION:

- Participates and leads trainings and orientations for student organization/club officers at the beginning and throughout each semester with SLL Office staff.
- Provides one-on-one advising and training on an ad hoc basis to student officers and faculty/staff advisors.
- Creates and continuously updates training materials, such as, power point presentations, handouts, quick guides, etc.
- Educates student organization/club officers and faculty/staff club advisors on the policies and procedures for deposits, cash advances, reimbursements, payments for services, sales and use tax, and other applicable financial transactions.
- Coordinators/Prepares/Presents SLL Summer/Winter Orientation presentations.
- Coordinator other SLL outreach activities at Chico Preview Day and Choose Chico.

ADMINISTRATIVE SUPPORT:

- Assist the Director with workload organization and completion as requested, including scheduling and coordination of meetings/events.
- Assist the Director with the creation of a positive work environment within SLL and Rec Sports.
- Prepare travel arrangements and documentation for staff as needed.
- Provides phone support for SLL as needed.
- Trains back-up support to assist student organization/club officers when away from office.
- Develop procedures, guidelines, and tracking mechanisms to ensure compliance with policies and procedures.
- Support departments as needed, when vacancies arise, regarding budget, CSUBuy, Concur, CatsConnect, student payroll, etc.

OTHER DUTIES:

- Other duties as assigned.

Total should equal 100% Time and 100 Weight  Total

D. GENERAL GUIDELINES AND EXPECTATIONS

1. Represents the University promoting a positive public image.
2. Acknowledges, respects, and values each individual.
3. Applies the highest standard of excellence to the delivery of service to our customers and community.
4. Demonstrates an open, participatory, team-oriented style; working cooperatively toward the achievement of your department's mission and goals; and demonstrating flexibility and adaptability regarding changes.
5. Keeps commitments. Notifies supervisor if a deadline cannot be met by describing what measures can be taken to correct the situations.
6. Maintains knowledge and skills at a level necessary to perform work.
7. Adheres to established work hours including starting time, and lunch and rest breaks. Provides appropriate planning and notice for all absences.
8. Is fiscally responsible with the organization’s equipment, property and funds.
9. Adheres to the highest level of professionalism by demonstrating honesty, integrity and reliability. Encourages others to act in this professional manner.
10. Demonstrates the ability to effectively establish and maintain cooperative working relationships with a diverse multicultural environment.
E. QUALIFICATIONS

To perform this job successfully, an individual must be able to perform each essential duty satisfactorily. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

This position requires the ability to effectively establish and maintain cooperative working relationships within a diverse multicultural environment.

1. Demonstrated Knowledge, Skills and Abilities

Must have the knowledge, skills and abilities to perform the responsibilities of this position as stated in the sections for Essential Functions and Responsibilities, Work Lead Responsibilities (if applicable) and General Guidelines and Expectations.

KNOWLEDGE:
Incumbent must possess:
Working knowledge of:
* Financial record-keeping, accounting and administration.
* Budget policies and procedures.

Basic knowledge of methods and procedures for research and statistical analysis and the ability to apply them.

Proficiency with integrated financial systems and other types of records management systems and current computer word processing and spreadsheet software programs, such as Microsoft Word, Excel, Access, Outlook, as well as web browsers, query tools, and mainframe applications and/or automated accounting systems.

SKILLS:
Incumbent must possess:
* Demonstrated skill with planning and prioritizing tasks.
* Analytical skills, to identify underlying reasons or facts and summarize information or data into appropriate parts.
* Problem solving skills to evaluate alternatives and recommend effective solutions.
* Communication skills to understand, interpret and communicate procedures, policies, information and instructions, orally and in writing, as appropriate for the needs of the audience.
* Effective interpersonal skills as work often involves front-line contacts with a variety of campus and community individuals.

ABILITIES:
Incumbent must have the ability to:
* Learn, interpret, follow, and apply a wide variety standard of policies and procedures relating to and impacting the applicable program, organizational unit, and/or administrative specialty.
* Analyze data and make accurate projections using business mathematics and basic statistical techniques.
* Organize and plan work and projects including handling multiple priorities.
* Make independent decisions and exercise sound judgment.
* Compile, write, and present reports.
* Demonstrated ability to establish and maintain effective working relationships within and outside the work group and serve as a liaison for the organizational unit.
* Perform assigned duties.

2. Education and/or Experience

The knowledge, skills and abilities listed above would normally be obtained through a bachelor’s degree and/or full-time equivalent training and one year of full time administrative work experience involving study, analysis, and/or evaluation leading to the development or improvement of administrative policies, procedures, practices or programs.
F. PHYSICAL REQUIREMENTS
The physical requirements described are representative of those that must be met by an employee to successfully perform the essential functions of the job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Incumbent/applicant will need to be able to perform the essential job functions (duties) of this position with or without reasonable accommodation. This position alternates between remaining in a stationary position operating a personal computer for long periods of time and frequently moving about inside the office. Must be able to travel across campus to other offices and buildings for meetings and events. Also refer to the Physical Requirements & Work Environment form regarding this position.

G. WORK ENVIRONMENT

This position involves frequent to constant interaction with students, guests, faculty and staff. The office is a typical office environment with standard office equipment. This position requires occasional irregular hours such as evenings and weekends. Due to the requirement of performing responsibilities at meetings or events, the hours of work may vary at times. Notification of changes will be provided in accordance with the CBA. Also refer to the Physical Requirements & Work Environment form regarding this position.

H. PREFERENCES - This section is for recruitment purposes only
Please indicate what special skills, education or knowledge are preferred.

I. ADDITIONAL RECRUITMENT INFORMATION - This section is for recruitment purposes only

Replace this text with additional recruitment information. This box will expand as needed when you tab to next field.

APPROVAL

In Order of Approval

Incumbent: ____________________________ Date: ____________
Appropriate Administrator: ____________________________ Date: ____________
Vice President (or Designee): ____________________________ Date: ____________
Classification/Compensation: ____________________________ Date: ____________