



University Staff Position Description Form

Office of Human Resources

This description will be used as a basis for determining classification/skill level and will be maintained as an official record of the duties assigned to this position. Employee participation in the completion of this document is encouraged; however, the appointing authority and supervisor are accountable for establishing the assignment and ensuring the accuracy of this information.

FOR HUMAN RESOURCES USE ONLY:					
APPROVED CLASSIFICATION	CLASS CODE	EEO CAT	RANGE/ GRADE CODE	APP. BY C&C	DATE
AA/S – NE	1038	2	1	LL	10/9/24

1. POSITION INFORMATION

Employee: _____ Department: COB – Office of Student Engagement

Current Classification: AA/S - NE Working Title: Administrative Analyst, Student Success & Engagement

Time Base: F.T. P.T. _____ % Other _____ FLSA Status: EX NE

Position Provides Lead Work Direction To:

Classification: <u>Student Assistants</u>	Qty: <u>1-9</u>	FTE: <u>3.0</u>
Classification: <u>Instructional Students</u>	Qty: <u>1-9</u>	FTE: <u>3.0</u>
Classification: _____	Qty: _____	FTE: _____

Name & Title of Work Lead (if any): Bonnie Beevers, Director, Office of Student Engagement

Name & Title of Appropriate Administrator: Bonnie Beevers, Director, Office of Student Engagement

Name & Title of Dean/Manager (MPP): Jean-Francois Coget, Dean, College of Business

2. PRIMARY ACTION BEING REQUESTED (Select One)

Job Posting: New Position Replacement Position, former incumbent: Sanitta Coey

Update Position Description Only:

NOTE: An updated position description requires providing Employee with seven (7) days' advance notice. This updated position description must be endorsed by the Appropriate Administrator before being signed by the Employee. The Employee signs at least seven (7) days' prior to Effective Date.

Effective Date: _____

3. SIGNATURES

Signatures denote that this position description is an accurate statement of the duties and responsibilities assigned to this position. 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.

Employee: _____ Date: _____

Appropriate Administrator: Bonnie Beevers _____ Date: _____

Dean/Manager (MPP): Jean-Francois Coget _____ Date: _____

HR Staff Official Position Description

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4. MINIMUM QUALIFICATIONS

Please list only the Minimum Qualifications of the appropriate classification standards for this position. (Depending on the classification, this may be shown in the classification standards as Minimum Qualifications, Entry Qualifications, or Typical Qualifications. (Classification standards can be found at <https://www.calstate.edu/csu-system/careers/compensation/Pages/Classification-Standards.aspx>.)

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.

5. KNOWLEDGE, SKILLS, ABILITIES, AND EXPERIENCE

Please list any knowledge, skills, abilities, and experience for this position.

Required: Must be comparable to the Minimum Qualifications, appropriate to the skill level of the position, and would allow an incumbent to satisfactorily perform the Essential Functions of the position.

Experience

1. Experience providing administrative support to Administrator or Executive level positions.
2. Experience working with and supervising diverse groups and individuals.
3. Experience providing leadership and working collegially and collaboratively to meet organizational goals and initiatives.
4. Experience in planning and managing the operational activities of a unit.

Knowledge, Skills and Abilities

5. Excellent interpersonal skills.
6. Excellent skill level in MS Outlook including Outlook, Word, PowerPoint, and Excel with preference for some knowledge of MS Access as well.
7. Excellent time-management skills.
8. Ability to understand and communicate comprehensive and detailed knowledge of the University and College of Business Administration policies and procedures pertaining to undergraduate and graduate student services.
9. Ability to communicate clearly, professionally, and persuasively with enthusiasm with administrators, faculty, staff and students as well as external stakeholders on and off campus.
10. Demonstrated ability to analyze information, identify problems, and arrive at reasonable and sound decisions.
11. Ability to manage multiple programs with competing deadlines.
12. Demonstrated knowledge of meeting and event management, including budgeting, planning, organizational development, decision making, tracking, contracts, and policy implementation to carry out successful events on and off campus.
13. Ability to interpret and apply policies and procedures independently and use judgement and discretion to act when a precedent does not exist.
14. Ability to analyze operational procedural problems and develop, recommend and evaluate proposed solutions.
15. Ability to maintain confidentiality.
16. Ability to understand accounting procedures and budgetary requirements of the University and College
17. Ability to review student academic records and relate them to course requirements.
18. Ability to run the Office of Student Engagement independently including acquiring supplies, budget management, minutes taking and follow-up.

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19. Ability to provide lead work direction to staff, and student staff.
20. Ability to provide accurate and efficient qualitative and quantitative analysis on a variety of data sets related to comprehensive programs, services, and program assessment.
21. Commitment to maintaining a welcoming and inclusive work environment with diverse colleagues and constituents including faculty, students, staff, and members of the community.

Work Schedule:

22. Ability to travel and work early mornings, evenings and weekends as needed for special events.

Condition of Employment:

- Ability to successfully pass a background check

Preferred: List any desirable qualifications beyond the Minimum Qualifications and those that are Required that would enhance an incumbent’s ability to perform the work of the position (e.g., additional years of experience, advanced education, certification and/or specialized training).

23. Experience with University academic and financial computing environments, e.g., CFS-Financials, CMS-Human Resources/Student Administration and Data Warehouse (SacVault).
24. A knowledge of foundation obtained through training and administrative work experience involving study, analysis, and/or evaluation leading to assisting in the development or improvement of administrative policies, procedures, practices or programs.
25. Knowledge of University reporting policies and procedures.
26. Knowledge of MS Access, CRM or equivalent database software.
27. Data analysis using MS Access and Excel.
28. Knowledge of web-based programs and software.
29. Knowledge of social and professional networking sites such as LinkedIn, Facebook, Instagram, Twitter, etc.
30. Ability to support the Director on the collection and analysis of AACSB reporting data and documents.
31. Ability to generate and distribute promotional materials such as flyers, brochures, videos, and supporting materials using computer software.

6. POSITION SUMMARY

Provide a few short, specific statements, which outline the purpose of the job.

Under the general direction of the Director of the Office of Student Engagement (OSE) in the College of Business (COB), the Assistant to the Director will be responsible for the operations of the office including procurement, travel, budgets (General Fund, Trust, Lottery, ProCard, etc.), and overseeing timekeeping and student payroll functions. The incumbent will work with significant independence, performing a variety of complex and confidential tasks requiring a high level of initiative, judgement, priority setting and discretion. Responsibilities and activities are related to the support of a range of undergraduate programs for over 4000 undergraduate students and a wide and comprehensive scope of programs, events and services.

The incumbent will be the lead interface with campus and vendor personnel for all on and off campus events, programs and activities. The incumbent will spearhead operational issues for the OSE which requires extensive contact with students, faculty and staff and external stakeholders such as employers and scholarship sponsors. The incumbent will support and facilitate the direction of several special events during a typical semester and must possess a thorough and in-depth knowledge and understanding of the organizational structure and functions of the OSE, COB and University to provide the required assistance to the Director and other administrators, staff and faculty.

The incumbent will be responsible for exercising initiative and judgement in the performance of the effective operations of the office, using the knowledge of the COB academic, fiscal and administrative policies and procedures. The role includes significant budgetary and expense work including a major responsibility for the proper expenditure of all OSE accounts including the collection, analysis and distribution of results and outcomes.

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The incumbent must possess good interpersonal, organizational, and verbal/written communication skills to effectively drive the success of the OSE programs.

7. ESSENTIAL FUNCTIONS OF THE POSITION

Describe each major responsibility assigned to this position and indicate the percentage of time devoted to each function, as well as the frequency in which each function is performed.

Essential Functions and Marginal Functions should have a combined total of 100% of Time.

% of Time	Frequency (daily, weekly, monthly, etc.)	Essential Functions Only (List in order of importance)
25%	Daily	<p>BUDGETING & FINANCIAL TRANSACTIONS</p> <p>The incumbent is responsible for maintaining the budget and expense records for the OSE office, developing budget timelines to facilitate meeting University deadlines and monitoring CMS reports and reconciling accounts with the accounting office. The incumbent recommends necessary budget transfers to OSE Director and COB Budget Analyst. The incumbent will supervise and coordinate ordering and maintaining office supply inventory for the entire OSE.</p> <p>The incumbent has budgetary responsibility for all OSE related expenses and developing periodic budget reports to OSE.</p> <p>The incumbent must be able to exercise sound judgement in interpreting specific and general knowledge regarding university financial policies and procedures. Working with the Director on all budget and purchasing matters utilizing the CMS, University Foundation and University Enterprises financial environments. Prepares, tracks and monitors all Requisitions, Purchase Orders, Procurement adjustments, Check Requests, Petty Cash and Staples Marketplace orders.</p> <p>The incumbent will work with the OSE team to train staff to maintain, update and track accurate payroll balance reports on Excel spreadsheet for Instructional Student Assistants, Federal Work Study Student Assistants and Regular Student Assistants and manages the payroll procedures for all student staff to include entering time, distributing paychecks and resolving problems when they occur. Manages the communication with SEO, Financial Aid and OGS to ensure compliance with campus student hiring policies and procedures; takes lead role for all student hiring for the OSE.</p> <p>The incumbent works with the OSE Director and ASCII to prepare monthly and/or quarterly reports for all budget accounts related to OSE and tracks, monitors balances, expenditures for over 50 Scholarship accounts. (i.e. General Fund, Trust Fund, E, S, T, & X accounts).</p> <p>Provides travel support to the Office of Student Engagement. Assists with university travel system, Concur, and ensures compliance with all University and College-wide travel policies and procedures to enter travel requisitions and in preparing travel claims.</p>
25%	Daily	<p>ADMINISTRATIVE & COMMUNICATIONS</p> <p>The incumbent will be responsible for monitoring the timeliness and conformity to office standards for major reports, proposals and informational items. Independently composes and coordinates a variety of written correspondence for the OSE's Director approval and signature. Utilizes Qualtrics or similar to create, collect and manage data and information regarding OSE activities. Maintains hard copy and electronic files of</p>

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		<p>OSE correspondence and activities and budgetary matters. The incumbent provides leadership and serves in an administrative professional capacity to the Director of Office of Student Engagement [Undergraduate Business Advising Center & Business Student Services], ensuring compliance with the College, University, directives and procedures in matters delegated to the OSE.</p> <p>As the administrative analyst, the incumbent is responsible for carrying out special projects in tandem with the Director which requires contacting people and organizations, collecting needed information, purchasing needed materials, and creating spreadsheets and reports.</p> <p>The incumbent makes recommendations regarding solutions to administrative problems and ensures that office procedures are in compliance. Assists the Director with coordinating implementation of new programs and policies. Assists in ensuring that the goals and objectives of the OSE are met.</p> <p>The incumbent plays a key role in the administration of and management of the COB/OSE scholarship program, to include monitoring the master list of scholarships and awards, managing the COB's portion of the online scholarship portal, initiating and verifying award disbursements, creating and sending award memos to Financial Aid, verifying student eligibility, facilitating the post-acceptance process and processing student thank you letters.</p> <p>The incumbent serves as the OSE administrative coordinator for COB Academic Internships, to include fielding student questions, processing applications, forms and documentation related to academic internship application and approvals and works with the Associate Dean for Academic Programs office regarding enrollment and unique case scenarios.</p> <p>The incumbent serves as a resource person to COB faculty, students and staff on policies and procedures regarding student services and various other specialized areas.</p> <p>Provides training, lead work direction, and authority for other staff pertaining to the administrative problems related to day-to-day work unit and program operation. Serves as key member for all hiring and training of all student assistants. Maintains an awareness of established deadlines to ensure they are met.</p> <p>The incumbent serves as the contact person for other campus offices such as Graduate Studies, Accounts Payable, University Foundation (Sponsored Programs Administration), Procurement/Contract Services, Career Center, International Programs and Global Engagement, Facilities, Scholarships, Print & Mail, Associated Student, Inc. (ASI).</p> <p>Responsible for the management, utilization and upkeep of OSE online communication tools to provide information for students, employers, community partners and faculty, as related to the programs and services provided by the OSE office. This will include website pages, office email account, phone tree messages and online social media accounts. Maintains and utilizes OSE listserv system (BizList) to communicate information to students regarding all student services, important deadlines, announcements, events and employment opportunities. As part of a team, responsible for evaluating the effectiveness of all online communication methods. Trains and assists professional and student staff in the use of all online communication tools.</p> <p>The incumbent is responsible for overseeing the implementation of the office's reception functions: greet public, answer phones, send and respond to email and screen mail.</p>
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20%	Weekly	<p>EVENT PLANNING, MARKETING & MANAGEMENT</p> <p>The incumbent serves as a key team player and assists to initiate, plan, and manage all OSE events (including venue, catering, attendance tracking, vendor coordination, procurement and payment, student staffing and supervision for all OSE related special events during the year to include Beta Gamma Sigma induction ceremony, BizFest, Commencement ceremonies, Scholarship and Student Award recognition events, Prep Week Meal Streak, Business Pathway Networking Event, BizGen1, Study-Break and Coffee Break events) and similar networking events. Provides support for other events sponsored by the COB as needed and as new OSE events emerge.</p> <p>The incumbent is responsible for identifying, implementing, and tracking the marketing plan for all OSE events, services and programs. This will include the creation of flyers, and video as required; strategic and creative implementation of social media channels and making recommendations regarding new initiatives and strategies; effective use of website; and overseeing student employees tasked with marketing related activities. The incumbent will prepare and provide marketing reports to the Director to identify results of marketing plans and strategies and provide input on continuous improvement plans.</p> <p>The incumbent is responsible for ensuring the OSE’s compliance with all University branding policies and procedures for all OSE marketing material and maintains currency with any changes or updates.</p>
15%	Weekly	<p>DATA & ENROLLMENT MANAGEMENT</p> <p>The incumbent is responsible for collecting, managing and analyzing data from surveys, generating and analyzing a focus report for Beta Gamma Sigma, adding sections for internship classes and managing the enrollment.</p> <p>The incumbent must be familiar with the curriculum of all undergraduate and graduate programs and must maintain currency with regard to changes in policy and practice in the program areas.</p> <p>The incumbent is responsible for direct support of the programmatic activities of the OSE to include coordination, process improvement, reporting, communicating and collaborating with faculty, staff and numerous offices/contacts throughout the University, training student staff to support OSE programs effectively. This includes working with the OSE Coordinator of Student Programs to coordinate & execute the invitation process for the National Honor Society, Beta Gamma Sigma and other OSE programs to include Tutoring & Study Center, Commencement ceremonies, Internship program, Scholarship & Outstanding Student Award program, Business Student Organizations, BizGen1 Program and all other special events.</p>
10%	Daily	<p>LEAD WORK & PERSONNEL</p> <p>The incumbent manages the hiring and oversight of all student staff (Instructional Student Assistants, Student Assistants and Federal Work Study Students) and provides support for the hiring process for professional staff in the COB Office of Student Engagement. The incumbent utilizes CMS, FWS, EAB, Handshake, Adobe Sign and similar, and all student time reporting and payroll systems to include the full utilization of CMS for Student Hires, Job Data, Timekeeper and payroll distribution.</p> <p>The incumbent maintains confidentiality of sensitive information and attends all campus meetings and workshops as OSE office representative and shares pertinent information with different personnel. The incumbent will review and evaluate the work of OSE student assistants and instructional student assistants to facilitate the smooth operation</p>

Employee Initials:

Date:

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		<p>of OSE program activities and provide efficient service to students, faculty and staff. Responsible for hiring, training and overseeing the tracking of timesheets for office student assistants and instructional student assistants. Responsible for training on office procedures, computer software and evaluate their performance and take corrective action as necessary.</p> <p>Responsible for ensuring that the OSE office student staff provides accurate information to student, staff, faculty, employers and the general public. Train student assistants in all OSE programs and procedures.</p>
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8. MARGINAL FUNCTIONS OF THE POSITION

Describe each non-essential duty assigned to this position and indicate the percentage of time devoted to each function, as well as the frequency in which each function is performed.

Essential Functions and Marginal Functions should have a combined total of 100% of Time.

% of Time	Frequency (daily, weekly, monthly, etc.)	Marginal Functions Only (List in order of importance)
5%	As Needed	Other duties as needed.

9. ADDITIONAL INFORMATION

To enable appropriate classification determination, please elaborate on the information provided in the previous sections by completing the section below.

<p>9a. Nature and Scope of Authority: Identify the kinds of decisions made, judgment required, freedom to act, and supervision received (i.e., direct or general). Also indicate if position acts as a lead or supervises others, and explain.</p> <p>Recommends procedural changes as programs are developed and/or revised; evaluates current systems in relation to College and University policies. Provides lead work direction and/or supervision to ASC staff and student assistants (1-9) and Instructional Student Assistants (1-10) and FWS students (1-3) related to operational work unit and program areas for the OSE Recommends and implements changes as needed</p> <p>Significant budgetary responsibility related to the OSE operational budgets, including General Fund, Foundation and Lottery funds.</p>
<p>9b. Problem Solving: Types of problems encountered; issues, concerns addressed; types of problems incumbent required to refer to supervisor or others.</p> <p>Posses high-level problem solving and analytical skills in resolving problems. Incumbent must possess the ability to determine when it is suitable to involve the Director of the Office of Student Engagement.</p>
<p>9c. Contacts On- and Off-Campus: Purpose and nature of working relationships with on- and off-campus contacts.</p> <p>Representing the COB and the Director of the COB Office of Student Engagement, incumbent builds relationships with administrators, faculty, students and staff of the University. Incumbent also strives to build relationships with leaders of the business community and other community members to promote the University and the COB Office of Student Engagement programs, activities and services. It is critical that the incumbent exercise diplomacy and tact in interpersonal relationships.</p>

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10. ADA REQUIREMENTS – MUST BE COMPLETED

To comply with the Americans with Disabilities Act (ADA) of 1990, which prohibits discrimination against qualified individuals on the basis of disability, it is necessary to specify the physical, mental, and environmental conditions of the Essential Functions of the job (with or without a reasonable accommodation).

Use these codes to complete the section below: F (frequently), O (occasionally), N (not at all). Do not use “X.”

PHYSICAL		MENTAL		ENVIRONMENTAL	
F	Sit	F	Direct others	N	Is exposed to excessive noise
F	Stand	F	Concentrate	N	Is around moving machinery
F	Walk	F	Analyze	N	Is exposed to marked changes in temperature and/or humidity
F	Have mobility	F	Use reason/logic		
F	Bend	F	Demonstrate recall	N	Is exposed to dust, fumes, gases, radiation, microwave (circle)
F	Climb	F	Make decisions	F	Works rapidly
F	Reach	F	Works rapidly	N	Drives motorized equipment
F	Kneel	F	Handle multiple tasks/priorities	N	Works in confined quarters
F	Push/Pull	F	Tolerate variety	N	Works in high places
F	Have gross hand coordination	F	Work with others		Other:
F	Have fine hand coordination	C	Other: Speaking in Public		
F	Hear with background noise				
F	Hear the spoken word				
F	Hear over a phone/other device				
F	See to read fine print				
F	See to read bold print				
F	See to accomplish a task				
F	Talk				
F	Communicate				
F	Lift: <u>15</u> lbs. max				
F	Carry: <u>15</u> lbs. max				
F	Operate equipment				
F	Perform keyboard entry				
	Other:				

11. FOR INFORMATION TECHNOLOGY POSITIONS ONLY

PROJECT COORDINATION/LEAD RESPONSIBILITIES

Describe on-going project coordination and/or lead responsibilities, if any, including the number and type of positions for which lead direction is provided. Any projects or accountabilities of a temporary nature must include duration of assignment.

TECHNOLOGY USAGE

Please list the type of computer and/or technology systems used by this position to perform the work, as well as the associated operating systems, software, and applications used.

Hardware Type	Software Applications Used