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**POSITION DESCRIPTION INFORMATION**


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To edit an approved Position Description scroll to the bottom of the form and press Update PD  
Click OK in the pop-up window that appears to reset the approval process

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**POSITION INFORMATION**


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<b>Type of Action Requested:*</b>	New (Create a new Position Description)
<b>Internal Team:*</b>	FL-Housing-Administration - 10130
<b>Job Code/Employee Classification:*</b>	Admin Analyst/Spclst 12 Mo <u>Job Code: 1038</u>
<b>Classification Title:</b>	Administrative Analyst/Specialist - Exempt I
<b>MPP Job Code:</b>	NA
<b>Position Number:</b>	Admin Analyst/Spclst 12 Mo <u>Position no: FL-10009954</u>
<b>CSU Working Title:*</b>	Senior Budget Analyst (Administrative Analyst/Specialist - Exempt I)
<b>Salary Range/Grade:</b>	1038-EXEMPT I-Grade-2 Minimum: \$ 4,598.00 Maximum: \$ 8,318.00 Pay Frequency:
<b>Reports to Supervisor:</b>	Jennifer Ortiz
<b>Reports To:*</b>	Associate Director, Admin & Conference Service <u>Position no: FL-10009337</u>
<b>Campus:*</b>	Fullerton
<b>Division:*</b>	VP, Student Affairs Office
<b>College/Program:*</b>	Student Engagement
<b>Department:*</b>	Housing-Administration - 10130
<b>FLSA Status:</b>	Exempt
<b>Hiring Type:</b>	Probationary
<b>Workplace Type (Exclude Inst Fac):</b>	
<b>Pay Plan:</b>	12 Months
<b>Pay Plan Months Off:</b>	NA

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**POSITION DESIGNATION**


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<b>Mandated Reporter:*</b>	General - The person holding this position is considered a general 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.
<b>Conflict of Interest:*</b>	None
<b>NCAA:</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Is this a Sensitive Position?:</b>	<input checked="" type="radio"/> Yes <input type="radio"/> No
<b>Care of People (including minors) Animals and Property:</b>	No
<b>Authority to commit financial resources:</b>	No
<b>Access/control over cash cards and expenditure:</b>	No
<b>Access/possession of master/sub-master keys:</b>	No
<b>Access to controlled or hazardous substances:</b>	No
<b>Access/responsibility to personal info:</b>	Yes
<b>Control over Campus business processes:</b>	No
<b>Responsibilities requiring license or other:</b>	No
<b>Responsibility for use of commercial equipment:</b>	No
<b>Is this a Campus Security Authority (CSA):</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No
<b>Serves a security function:</b>	No

**Designated recipient for crime/misconduct reports:** No

**Significant responsibility for Student Activities:** Yes

**Significant responsibility for Campus Activities:** Yes

**Job Summary/Basic Function:\***

Under the general supervision of the Associate Director for Admin and Conference Services, the Senior Budget Analyst independently performs the technical budget analysis and reporting work required to administer the revenue, operating and capital budgets for all cost centers within Housing and Residential Engagement. Serves as budget advisor to Housing and Residential Engagement staff; assists with short and long-term budget administration, planning, and analysis; coordinates training sessions for staff on budget tracking including system access and security; communicates information related to budget administration policies and procedures both in writing and verbally, as needed. The Budget Analyst processes, records, maintains, tracks, and reconciles the revenue and expenditures for all Housing and Residential Engagement accounts with the Common Financial System and the Cal State Fullerton Philanthropic Foundation reporting systems; resolves discrepancies; develops revenue and expenditure reports; monitors budgets transfers; develops and maintains salary projections; and processes the monthly Payroll and reconciles with the Payroll Expenditure Reports. The Budget Analyst assists the Associate Director for Admin and Conference Services along with the Executive Director for Housing and Residential Engagement with the complex financial forecasts, projections, and analysis needed for the department. The incumbent assists in monitoring the hiring processes within the department as it pertains to budgeting; and prepares mid-year as well as year-end financial statements and reports.

**Minimum Qualifications:\***

Bachelor's degree from an accredited four-year college or university and/or the equivalent training and administrative work experience involving the study, analysis, evaluation, development or improvement of administrative policies, procedures, practices or programs plus four years of related experience. Working knowledge of and the ability to apply standard theories, principles, practices, and techniques applicable to the program and/or administrative specialty to develop conclusions and make recommendations. Thorough knowledge of the policies, procedures, and outside regulations pertaining to the applicable program and/or administrative specialty. Working knowledge of operational and fiscal analysis and techniques. Ability to take initiative and plan, organize, coordinate, and perform work in various situations where numerous and diverse demands are involved. Skilled in the research, development, and evaluation of policies and programs. Ability to collect, evaluate, and interpret data to develop sound conclusions and make appropriate recommendations. Expertise in investigating and analyzing problems with broad administrative impact and implications. Ability to anticipate problems and address them proactively. Demonstrated ability to effectively interpret, organize, and present information and ideas in written or presentation form. Ability to train others on new skills and procedures and provide lead work direction. Detail oriented with the ability to multi-task, prioritize assignments, and work with minimal supervision. Possession of strong written and oral communication skills, as well as thorough knowledge of English grammar, spelling, punctuation, and appropriate writing style. Ability to make presentations, lead discussions, and explain complex processes to non-technical personnel.

**Required Qualifications:**

**Preferred Qualifications:**

A master's degree in accounting, business administration or a related field from an accredited four-year college or university. Previous CSU experience, especially in a budget/administration and/or housing related position is highly desirable.

**Special Conditions:**

A background check (including a criminal records check) must be completed satisfactorily before any candidate can be offered a position with the CSU. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for the position.

**License / Certification:**

**Supervises Employees:\***

Yes  No

**If position supervises other employees; list position titles:**

## Job Duties

### JOB DUTIES

% of time	Duties / Responsibilities	Essential / Marginal
30	<p>Housing Budget Administration</p> <ol style="list-style-type: none"> <li>1. Independently performs the technical budget analysis and reporting work required to administer the revenue, operating and capital budgets for all cost centers within Housing and Residential Engagement.</li> <li>2. Assists with short and long-term budget administration, planning, and analysis; coordinates training sessions for staff on budget tracking including system access and security; communicates information related to budget administration policies and procedures both in writing and verbally, as needed.</li> <li>3. Responsible for financial planning, forecasting, and analysis to ensure effective allocation of resources and compliance with budgetary guidelines for ongoing and future Capital Projects</li> <li>4. Provide direction to the Business Operations Coordinator in purchasing card reconciliation, invoices, purchase orders, deposits, requests for transfer, and end of year fiscal reports.</li> <li>5. Provide direction to the Business Operations Coordinator to administer Summer Conference quotes, invoices, and ensure final billing has been processed.</li> </ol>	Essential
25	<p>Budget Tracking/Reconciliation</p> <ol style="list-style-type: none"> <li>1. Processes, records, maintains, tracks, and reconciles the revenue and expenditures for all Housing and Residential Engagement accounts with the Common Financial System and the Cal State Fullerton Philanthropic Foundation reporting systems; resolves discrepancies; develops revenue and expenditure reports; monitors budgets transfers; develops and maintains salary projections; and processes the monthly Payroll and reconciles with the Payroll Expenditure Reports.</li> <li>2. Assists Associate Director for Admin and Conference Services along with the Executive Director for Housing and Residential Engagement with the complex financial forecasts, projections, and analysis needed for the department; prepares mid-year as well as year-end financial statements and reports.               <ol style="list-style-type: none"> <li>a. Assists the Executive Director with administering an annual department budget in excess of \$33 million.</li> <li>b. Ensures that audits of automated accounting systems are conducted on a regular basis to ensure integrity of accounts.</li> <li>c. Reviews quarterly receivables and ensures that necessary funds are remitted to Dining Services provider.</li> <li>d. Reviews contracts with third-party vendors, including Dining Services provider, to ensure commission checks are received and processed.</li> <li>e. Acts as a liaison with University departments to coordinate department's fiscal affairs including annual payment processes and setting up item types.</li> <li>f. Reviews collections processes to reduce annual accounts receivables.</li> </ol> </li> </ol>	Essential
20	<p>Financial Advisement</p> <ol style="list-style-type: none"> <li>1. Serves as financial advisor to the cost centers to process financial documents; applies budgetary and accounting theories, principles, practices, and techniques to ensure appropriateness and proper expenditures.</li> <li>2. Performs analysis, independently identifies problems, investigates options, determine results, formulates recommendations and responds appropriately.</li> <li>3. Counsel students on financial difficulties relating to payment of their License agreement.</li> <li>4. Counsel students regarding cancellation of their License agreement and respond to any appeal to break License agreement.</li> <li>5. Oversees coordination of financial activities for residents: administers billings, refunds, certification and deferment programs for students.</li> </ol>	Essential
10	<p>Financial Reporting</p> <ol style="list-style-type: none"> <li>1. Analyzes department budget allocations, compares and contrasts current year allocations with previous year allocations.</li> <li>2. Prepares other analytical reports, as assigned, and reports findings to the Executive Director; coordinates year-end fiscal activities for all departmental accounts.</li> <li>3. In collaboration with the Assistant Director for Occupancy and Operations, reviews and negotiates annual housing agreement with campus partners and third-party vendors, including Athletics, Guardian Scholars, etc.</li> <li>4. In collaboration with Executive Director, establishes and distributes established room and board rates annually as needed.</li> </ol>	Essential
10	<p>Budget Coordination</p> <ol style="list-style-type: none"> <li>1. Coordinates with the Division of Administration and Finance regarding budget allocations, account balances, transfers and expenditures using an online Common Financial System (CFS) as well as the Cal State Fullerton Philanthropic Foundation system.</li> <li>2. Reviews Position Control Report for recruitment requests, to monitor budgeted salaries, clarify payroll issues and assist with correcting errors.</li> <li>3. Identifies goals and objectives for the Administrative and Financial Operations area.</li> <li>4. Assist the Assistant Director for Conference Services and Off-Campus Housing by supporting Summer Conference initiatives by analyzing revenue streams, optimizing financial performance, and ensuring alignment with overall financial goals.</li> </ol>	Essential
5%	<p>Other Duties as Assigned</p> <ol style="list-style-type: none"> <li>1. Performs other duties as assigned.</li> </ol>	Essential

## SELECTION CRITERIA

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There are no items to show

### Physical Mental and Environmental Demands

**\*\* Physical Mental and Environmental Requirements Must be Completed for all Positions \*\***

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Please indicate the frequency (Constantly; Frequently; Occasionally; or Never) and whether or not the requirement is essential.

#### Physical and Mental Requirements

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<b>Bending:</b>	Occasionally
<b>Climbing:</b>	Never
<b>Concentrating:</b>	Frequently - Essential
<b>Crawling:</b>	Occasionally
<b>Decision Making:</b>	Frequently - Essential
<b>Keyboarding and Mousing:</b>	Constantly - Essential
<b>Lifting or Carrying up to 10 lbs.:</b>	Occasionally
<b>Lifting or Carrying up to 25 lbs.:</b>	Occasionally
<b>Lifting or Carrying up to 50 lbs.:</b>	Occasionally
<b>Lifting or Carrying over 50 lbs.:</b>	Never
<b>Performing Calculations:</b>	Constantly - Essential
<b>Pushing or Pulling:</b>	Occasionally
<b>Reaching Overhead:</b>	Occasionally
<b>Repetitive Motion of Upper Extremities:</b>	Occasionally
<b>Sitting:</b>	Frequently
<b>Standing:</b>	Frequently
<b>Stooping Kneeling or Squatting:</b>	Occasionally
<b>Walking:</b>	Occasionally

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To add additional Physical and Mental Requirements - Please provide the 1) Physical and/or Mental Requirement description; 2) Frequency (Constantly; Frequently; Occasionally; or Never) and 3) Whether it is Essential to the position:

**Other Physical & Mental Requirement No. 1**

**Description:**

**Other Physical and Mental Req No.1 Frequency:**

**Other Physical & Mental Requirement No. 2**

**Description:**

**Other Physical and Mental Req No.2 Frequency:**

**Other Physical & Mental Requirement No. 3**

**Description:**

**Other Physical and Mental Req No.3 Frequency:**

**Other Physical & Mental Requirements:**

#### Environmental Requirements

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<b>Drive motorized equipment:</b>	Occasionally - Essential
<b>Excessive Noise:</b>	Never
<b>Hazards:</b>	Never
<b>Outdoor:</b>	Never
<b>Elevated Work:</b>	Never
<b>Extreme Temperature (hot or cold):</b>	Never
<b>Indoor (Typical office environment):</b>	Constantly - Essential

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To add additional Environmental Requirements - Please provide the 1) Environmental Requirement description; 2) Frequency (Constantly; Frequently; Occasionally; or Never) and 3) Whether it is Essential to the position:

**Other Environmental Requirement No. 1**

**Description:**

**Other Environmental Req No.1 Frequency:**

Other Environmental Requirement No. 2  
Description:

Other Environmental Req No.2 Frequency:

Other Environmental Requirement No. 3  
Description:

Other Environmental Req No.3 Frequency:

Other Environmental Requirements:

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### POSTING DETAILS

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**Advertising Summary:**

Advertisement text:

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### USERS AND APPROVALS

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**Justification for Position:**

**Hiring Administrator:\***

Kafele Khalfani

**Email address: [kkhalfani@fullerton.edu](mailto:kkhalfani@fullerton.edu)**

**Approval process:\***

FL - PD Approval (Staff/MPP) - Dept Head

1. MPP Supervisor:	Jennifer Ortiz	✓ Approved Oct 25, 2024
2. Department Head/Associate Dean:	Kafele Khalfani	✓ Approved Oct 25, 2024
3. HR Classifier:	Tammy Dietzel	✓ Approved Oct 25, 2024
4. Appropriate Administrator/Dean:	Vincent Vigil	✓ Approved Oct 25, 2024

**HR/Faculty Affairs Representative:\***

FL-HRDI Classifier

**Email address: [hrrecruitment@fullerton.edu](mailto:hrrecruitment@fullerton.edu)**