Staff / MPP Position Description

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| HR USE ONLY  |
| Conflict of Interest (COI) Designated: [ ]  Yes [ ]  No  Mandated Reporter: [ ]  Limited [ ]  General [ ]  N/A Campus Security Authority (CSA): [ ]  Yes [ ]  No | **HR Reviewed By & Date:**  |

Conflict of Interest Per Political Reform Act of 1974

If the person holding this position is considered a ‘Conflict of Interest Designate’, under the Political Reform Act of 1974. They are required to comply with the requirements set forth in Conflict-of-Interest codes as a condition of employment.

Mandated Reporter Per CANRA

If the person holding this position is considered a ‘mandated reporter’, under the California Child Abuse and Neglect Reporting Act. They are required to comply with the requirements set forth in [CSU Executive Order 1083](https://calstate.policystat.com/policy/10927154/latest/#attachments/c69e6c3b-de81-4119-9dcb-ead514145a9a/EO-1083%20AttachB_Final%20Draft.pdf) as a condition of employment.

**Campus Security Authority**

This position may be considered a “Campus Security Authority”, pursuant to the Clery Act, and is required to comply with the requirements set forth in CSU Executive Order 1107 a condition of employment.

# SECTION I. POSITION INFORMATION

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| **Reason for Position Description (Please check all that apply):** | [ ]  Classification Review [ ]  Update Position Description[x]  New Position [ ]  Existing Position [ ]  Temporary Reassignment[ ]  Permanent Reassignment [ ]  Recruitment |
| **This position description is being submitted by:** | [ ]  Employee [x]  Supervisor/Lead[x]  Dean/Chief Administrator |
| **Effective Date:** |  |
| **Division:** | Admin Affairs |
| **Department:** | Budget |
| **Employee Name:** |  |
| **Humboldt Employee ID:** |  |
| **Current Classification:** | Admin Analyst/Specialist I-NE |
| **Position Number:** | 00024257 |
| **FLSA Status:**  | [ ]  Exempt (not overtime eligible) [x]  Non-exempt (overtime eligible) |
| **Working Title:** | Budget Analyst |
| **Time Base:** | 1.0 |

# SECTION II. PURPOSE OF POSITION

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| **State the basic purpose of the position in one or two specific statements.** | Under the supervision of the Director of Budget and Financial Planning, this position is responsible for independently performing a broad range of technical, reporting, and analytical functions that assist the University Budget Office in administering the CSU budgetary program and in providing consultative budget services to campus constituents. Incumbents in this classification are assigned to assist and may work with, or under the guidance of, various members of the University Budget Office team. |

# SECTION III. MAJOR RESPONSIBILITIES

List the major responsibilities/functions of the job in descending order from the most important to the least important. Indicate approximate percentage of time spent in each (percentages should not be less than 5%). An Essential Function is a job-related task that is essential to the job. A marginal function is a job-related task that is not an essential aspect of the job. Essential Functions and Marginal Functions should have a combined total of 100%.

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| **Description of Major Responsibilities:**  | **Essential Functional or Marginal Function?** | **(%) Percent of Time** |
| * Independently perform in-depth analysis and interpretation of complex data and information and present and/or communicate findings in a clear and effective manner.
* Analyze data and develop financial forecasting models using mathematical and statistical techniques (revenue projections, spending projections, salary cost estimates, peer data comparisons, etc.).
 | E | 45% |
| * Research, analyze, and prepare reports on performance metrics, financial ratios, and financial trends reflecting institutional and unit performance; analysis should incorporate best practices benchmarks and peer comparisons.
* Develop and maintain budget and financial reports and dashboards, including the use of SQL, creation of fields and tables, and other database development as necessary; reports and dashboards may reflect data on a monthly, quarterly, annual, multi-year, or ad­ hoc basis; serve as the primary contact for such reports and dashboards.
* Participate in the design, development, testing, and installation of budgeting system improvements and upgrades.
 | E | 25% |
| * Lead and work collaboratively with diverse groups to build alignment and successfully accomplish assigned projects and initiatives that lead to organizational improvement, greater efficiency, and improved customer service to the campus.
* Provide training, guidance and assistance to the campus community and develop resources for use by campus budget analysts, professional, and/or technical staff.
 | E | 20% |
| * Research and develop policy recommendations, business processes, standards, and procedures; assess, formulate, and evaluate impacts of recommended or implemented policies and procedures from a strategic and operational perspective.
 | E | 5% |
| * Other duties as assigned.
 | E | 5% |
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| **Total =100%** |  |

Please note that during periods of declared state or campus emergencies, state employees can be designated as “disaster workers” and may be required to report to the campus to deal with the emergency. Emergency assignments will be made at the time of your call to campus.

# SECTION IV. CHANGES IN RESPONSIBILITES

1. What overall percentage of changes occurred in the assigned duties and responsibilities since the position was filled or the last review? Be specific. If responsibilities have increased or decreased, which ones and in what way? What new duties were added and what did they replace?

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| **Changes in Responsibilities:**  | **(%) Percent of Change** | **Date Changed** |
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1. *Did the new duties transfer from another employee? If so, which employee? If the added duties*

*replace other assignments, what will happen to the duties that were removed? (List other positions*

*affected and summarize impact, if applicable.)*

# SECTION V. WORK DIRECTION OVER OTHERS

If this position leads (or manages/supervises if MPP) other positions, then list the classifications. Indicate type of direction, whether direct (directly supervises the position and conducts performance evaluation, MPP Only) or indirect (acting in a lead capacity or assigning work).

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| **Classification** | **Working Title** | **Type of work direction** **(Direct or Indirect)** |
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# SECTION VI. POSITION REQUIREMENTS:

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| **List education and years of experience required, as listed in Classification Standards. If applicable, include necessary certificates and licenses (Driver’s License).** | 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. |
| **List REQUIRED skills, knowledge, and abilities required for this position.**  | **As listed in Classification Standards:*** General knowledge of and ability to apply fundamental concepts of financial, budgetary, and accounting principles and practices.
* Knowledge of basic methods and procedures for research and statistical analysis and the ability to apply them.
* Ability to analyze data and make accurate projections using business mathematics and basic statistical techniques.
* Ability to organize and plan work and projects including handling multiple priorities.
* Ability to make independent decisions and exercise sound judgment.
* Ability to compile, write, and present reports related to finance, budget, and accounting.
* Demonstrated ability to establish and maintain effective working relationships within and outside the University Budget Office and serve as a liaison for the office.
 |
| **List PREFERRED skills, knowledge, and abilities required for this position.**  | * Technical fluency with Oracle/PeopleSoft, CSU Common Management System, or equivalent information system.
* Microsoft Office Professional; Google Workspace (Gmail, Docs, Sheets, Drive, Calendar, Forms, etc.).
* Experience in a higher education.
 |

**SECTION VII. *Background Check, Credit Check, and Sensitive Information:***

1. **Background Check***: A background check must be satisfactorily be completed before a candidate can be offered this position. Failure to satisfactorily complete the background check may affect the application status of applicants or continued employment of current CSU employees who apply for this position. The background check consists of the following: Employment and education verification, reference checks, and checks of the following systems and databases: National Social Security number/Address Locator, Felony/Misdemeanor, National Criminal Database, Federal Criminal, Department of Motor Vehicles, and National Sex Offender Registry.*
2. **Credit Check**: Credit checks will only be performed for new hires or current employees who are voluntarily reassigned or reclassified into a position that requires a credit check. To determine if this position requires a credit check, please consult with Classification & Compensation Services and reference the [CSU Background Check Policy](https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy) located at: <https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy>.

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| **Does this position require a credit check?** | ***Yes***[ ] ***No***[x]  |

1. Sensitive Position*:* For current employees who are voluntarily reassigned or reclassified to a sensitive position, a background check is also required. To determine if this position is a sensitive position, please consult with Human Resources and reference the [CSU Background Check Policy](https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy) located at: <https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy>, complete Attachment B.

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| **Does this position meet the criteria for a sensitive position?** **See Attachment B** | ***Yes***[x] ***No***[ ]  |

# SECTION VIII. SIGNATURES

Signature indicates position description is an accurate and correct statement of duties and responsibilities assigned to position.

Employee’s Signature & Date

Position Lead Signature & Date

[Name]: Sarah Long, [Position Title]: AVP Financial Operations & University Controller (Acting Director of Budget & Financial Planning

Appropriate Administrator’s/Supervisor Signature & Date

[Name]: Sarah Long, [Position Title]: AVP Financial Operations & University Controller (Acting Director of Budget & Financial Planning

Dean’s or Chief Administrator’s Signature & Date

[Name]: Sherie Gordon, [Position Title]: VP Admin & Finance

# Attachment A

Complete for all positions

**To comply with the provisions of the Americans with Disabilities Act, specify the physical, mental, and environmental conditions of the essential functions of the job, please complete the sections below.**

**Physical Summary:** Choose one description out of the categories below that best describes this position.

[x]   **Sedentary Work:** Involves mainly sitting. Walking and standing are minimal. Lifting is limited to lightweight objects (10 pounds or less).

[ ]   **Light Work:** Job involves some lifting of medium weight objects (10-20 pounds) and/or 10% -20% of the job involves standing or walking.

[ ]   **Medium Work:** Job **i**nvolves lifting heavy-weight objects (20-40 pounds) and/or 20%-40% of the job involves standing, squatting, kneeling, or walking. May require pushing or pulling objects within the weight limits.

[ ]   **Heavy Work:** Job involves lifting more than 40 pounds. Approximately half of the incumbent’s time will be spent walking, standing, squatting, kneeling, or climbing.

**Use codes below for each of the item(s) which most accurately describes the extent of the specific activity performed in this position.**

“C” = constantly or 6-8 hours per day “F” = frequently or 3-6 hours per day

“O” = occasionally or up to 3 hours per day “N” = never

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|  **Physical Requirements of the Position**  |  **Mental Requirements of the Position** |
| O | Bending (neck) | F | Reading & Comprehending |
| O | Bending (waist) | F | Writing |
| N | Climbing | F | Performing Calculations |
| N | Crawling | F | Communicating Orally |
| N | Kneeling | F | Reasoning & Analyzing |
| O | Pushing/Pulling | F | Decision Making |
| F | Sitting |  | Other: |
| N | Squatting |  | Other: |
| O | Standing | **Environmental Working Conditions** |
| O | Twisting (neck) | N | Exposure to variations in temperature/humidity |
| O | Twisting (waist) | N | Exposure to chemicals, gases, dust, or fumes |
| O | Walking | N | Operates machinery or drives motorized equipment |
| O | Handling Objects | N | Exposure to bio-hazards |
| F | Manual dexterity | C | Working in normal office environment |
| O | Reach above/below shoulder | N | Uses specialized equipment |
| N | Using foot controls |  | Other: |
|  | Other: |  | Other: |

# Attachment B

Complete for all positions

***Sensitive Position:*** *For current employees who are voluntarily reassigned or reclassified to a sensitive position, a background check is also required. To determine if this position is a sensitive position, please consult with Human Resources and reference the CSU Background Check Policy located at:* [*https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy*](https://csyou.calstate.edu/Policies/HRPolicies/HR2017-17.pdf#search=background%20check%20policy)*.*

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|  *Consideration for designation as a sensitive position per HR Technical Letter 2017-17* |
| 1. Does this position have responsibility for the care, safety, and security of people (including children and minors), animals, and CSU property?
 | [ ] Yes [x]  No | For example, lifeguards, health care professionals, custodians assigned to housing areas, etc.Sexual offender registry check for those who perform work involving regular or direct contact with minor children and those who are identified as mandated reporters of child abuse and neglect under Executive Order 1083 and California Penal Code §11165.7(a). |
| 1. Does this position have authority to commit financial resources of the university through contracts greater than $10,000
 | [ ] Yes [x]  No |  |
| 1. Does this position have access to, or control over, cash, checks, credit cards, and/or credit card account information?
 | [ ] Yes [x]  No |  |
| 1. Does this position have responsibility or access/possession of building master or sub-master keys for building access?
 | [ ] Yes [x]  No | Broad access to buildings or facilities |
| 1. Does this position have access to controlled or hazardous substances?
 | [ ] Yes [x]  No | Examples:* Dispenses prescription medication.
* Maintains drug formulary.
* Duties requiring access to controlled substances.
* Uses hazardous chemicals.
 |
| 1. Does this position have access to and responsibility for detailed personally identifiable information about students, faculty, staff, or alumni that is protected, personal, or sensitive?
 | [x] Yes [ ]  No | Protected data ([Level 1 data](https://its.humboldt.edu/protected-data)) |
| 1. Does this position have control over campus business processes, either through functional roles or system security access?
 | [x] Yes [ ]  No | Control over/ability to modify employee, student, financial databases, or other business mechanisms |
| 1. Does this position have responsibilities that require the employee to possess a license, degree, credential, or other certification to meet minimum job qualifications and/or to qualify for continued employment in an occupation or position?
 | [ ] Yes [x]  No | List professional licensing, certification, and/or credential verification required *(ex. CPR/BLS certification, equivalent to Bachelor’s, etc.):* [ ]  \_\_\_\_\_\_\_ |
| 1. Does this position have responsibility for operating commercial vehicles, machinery or equipment that could pose environmental hazards or cause injury, illness, or death?
 | [ ] Yes [x]  No | Motor Vehicle Records/Licensing Check is required (*ex. Valid CA class c driver’s license*): [ ]  \_\_\_\_\_\_\_  |
| **If you answered yes to any of the questions above, this position shall be deemed a sensitive position which may require additional background components.**  |

# Attachment C

Complete for MPP Positions Only

**Mental Effort:**

Enter frequency of occurrence for all applicable activities using the following key:

 “C” = constantly or 6-8 hours per day “F” = frequently or 3-6 hours per day

 “O” = occasionally or up to 3 hours per day “N” = never

|  |  |
| --- | --- |
| **Planning** | **Performance Evaluations** |
|  | Forecast |  | Determine Performance Standards |
|  | Set Program Goals |  | Authorize/Approve Awards |
|  | Determine Budget Allocations |  | Prepare Performance Evaluations |
|  | Establish, Implement, Revise Policies |  | Observe/Follow-Up daily |
|  |  |  | Correct Work/Behavior Problems |
| **Organization** | **Employee Relations** |
|  | Describe Relationships Between Functions |  | Initiate Corrective Action |
|  | Define Department/Divisional Structure |  | Authorize Formal Discipline |
|  | Establish Priorities to Meet Goals |  | Administer Collective Bargaining Agreements |
|  | Schedule Work for Employees |  | Prepares/Investigates Grievance Awards and Complaints |
|  | Implement procedures |  | Formulates/Represents University Position for Formal Grievances/Complaints |
|  | Determine work methods |  |  |
|  | Balance multiple tasks/projects |  |  |
| **Direction/Leadership/Supervision** | **Other** |
|  | Educate |  |  |
|  | Delegate |  |  |
|  | Coordinate |  |  |
|  | Coach/Train/Develop |  |  |
|  | Recommend Formal Training |  |  |
|  | Motivate |  |  |
|  | Instruct/Demonstrate |  |  |
|  | Schedule Staff/Readjust Schedule |  |  |
| **Staffing** |  |  |
|  | Define Roles |  |  |
|  | Give Input to Position Descriptions |  |  |
|  | Determine Selection Criteria |  |  |
|  | Recruit/Interview/Select |  |  |
|  | Orient Staff |  |  |
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