

Employee Name:



San Diego State University

MPP / Staff Position Description

HUMAN RESOURCES USE ONLY

Conflict of Interest (COI) Designated: Yes No

Mandated Reporter: Limited General N/A

Review Date: 10/10/2024

MPP Positions Only

MPP Job Code:

Job Family:

Job Function:

Job Category:

Mandated Reporter Per CANRA YES NO

The person holding this position is considered a 'mandated reporter,' under the California Child Abuse and Neglect Reporting Act (CANRA) and is required to comply with the requirements set forth in CSU Executive Order 1083 as a condition of employment.

Please Note: A current and accurate signed Position Description is required for each MPP / Staff position and must be on file in the Center for Human Resources. After completion, the Position Description should be reviewed, signed and dated by the employee, the supervisor and the Center for Human Resources - Classification and Compensation.

Please check one: New Position Existing Position Update

Date:	May 15, 2024
Department & Division:	EOP, Outreach and Success - Student Affairs and Campus Diversity
Employee Name <i>(leave blank if vacant):</i>	
Current Classification & Grade:	Administrative Analyst/Specialist Grade 1
FLSA Status: <i>(exempt or non-exempt)</i>	Non-Exempt
Working Title:	Budget Coordinator
Position Number & Job Code:	10001821
Working Title & Position Number of HEERA Designated Appropriate Administrator:	Director, 10009320

I. FUNCTION OF THE EMPLOYING UNIT:

Employee Name:

State the basic purpose of the Department/Unit in one brief paragraph. Include the division's DEI statement here.

The Office of the Vice President for Student Affairs and Campus Diversity is responsible for the coordination and development of student services and building the inclusive excellence of SDSU's staff and faculty at San Diego State University. Departments include, but not limited to, Assistant Deans for Student Affairs; Career Services; Communications Services; Counseling & Psychological Services; Cultural and Identity Centers; Educational Opportunity Programs, Outreach and Success; Financial Aid and Scholarships; Military Veterans Program; New Student and Parent Programs; Office of the Student Ombudsman; Residential Education; Resource Management; Student Ability Success Center; Student Health Services; Student Life and Leadership; Student Rights and Responsibilities; Testing Services Office; Well-being & Health Promotion; and programming related to Inclusive Excellence.

Division of Student Affairs and Campus Diversity

The Division facilitates the academic and career success, personal growth, and well-being of all students, and works proactively to address systemic inequities through professional learning, community building, advocacy, policy recommendations and organizational structures. We aim to foster an affirming campus culture based on the core values of excellence, equity, diversity, belonging and inclusion through:

- Recruiting and retaining faculty and staff who are reflective of the diverse student body and communities served by SDSU, and recruiting students who are representative of the rich diversity of the region and the world;
- Fostering an environment that is welcoming, affirming, and empowering for students, faculty, staff and alumni of all backgrounds;
- Enhancing the career and educational pathways of a diverse student body, the faculty and staff, including enhancing the learning environment and expanding learning opportunities for all students inside and outside the classroom, and expanding and connecting opportunities for students to participate in transformational experiences;
- Developing leaders who believe in and lead others toward supporting civility, mutual respect and diversity in our society and workplaces; and
- Cultivating relationships with the local community that advance the well-being of diverse individuals and communities.

Position upholds the Student Affairs and Campus Diversity Statement on Diversity, Equity, and Inclusion, specifically:

“The Division of Student Affairs and Campus Diversity acknowledges and honors the inherent value and dignity of all individuals by creating and nurturing a learning and working environment that affirms and leverages our community’s diversity of traditions, heritages, perspectives, and experiences. We are committed to fostering a culture of inclusive excellence designed to facilitate the personal and professional success, growth, development, and well-being of all members of our community. We manifest this commitment through our innovative, strategic and collaborative efforts to develop leaders who believe in and lead others toward practicing civility, mutual respect, and inclusion in our workplaces and society.”

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A primary goal of the Office of Educational Opportunity Programs, Outreach and Success (EOPOS) is to improve access to higher education for students from underrepresented backgrounds by implementing and administering early outreach programs and recruitment processes which develop an understanding of, and support, the pathway to higher education for students and their parents, guardians and loved ones. EOPOS builds collaborative relationships with schools, school districts, community colleges and other organizations to support this goal. EOPOS assists students in overcoming historical, traditional, social, economic, psychological, and educational barriers throughout their collegiate experience and in achieving academic success by providing a comprehensive program of support services. Typical services provided include, but are not limited to: outreach and recruitment, pre-admission counseling, screening-and-selection, professional development in teaching/learning methodologies, program orientation, summer bridge programs, financial aid advising and follow-up, special/regular admission, academic advising, tutoring, learning skills, peer mentoring, and academic/personal support services.

II. PURPOSE OF POSITION:

State the basic purpose of the position in one to three specific statements.

Under the supervision of the Director of Educational Opportunity Programs, Outreach and Success (EOPOS) the Budget Coordinator has oversight responsibilities for department funds, to include accounting, purchasing, preparation and review of various fiscal and accounting forms. The incumbent will be the primary person conducting all major purchases for the department. They serve as a budget officer and designated liaison staff for the office of the Associate Vice President for Student Affairs, interacting with appropriate department staff to identify, prepare and submit draft fiscal budget requirements. The incumbent is also responsible for assisting with annual reporting including but not limited to: CSU Foster Youth funding, CSU Early Assessment Program funding, EAP Grant utilization, Price Community Scholars scholarship and in-kind purchases, philanthropy funding and gift card distributions and the various programs housed under EOPOS.

The incumbent coordinates the processing of personnel records for full-time staff and student employees, including payroll and attendance reports, and other human resources forms such as Position Descriptions, Staff Transaction forms and Personnel Requisition Requests and any other document required for personnel. Identifies and tracks salary savings, position conversions, and prepares reports on all salary commitments and salary savings. Work requires coordination and communication on all levels within the organization and the campus community.

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.

III. CHANGES IN RESPONSIBILITIES

(What changes have occurred in the assigned duties and responsibilities since the position was filled or the last review? Be specific. If responsibilities have increased, which ones and in what way? Were new duties added? What did they replace? **Leave blank if this is a brand new position.**)

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IV. MAJOR RESPONSIBILITIES:

Clearly list the major responsibilities/essential functions in descending order from the most important to the least important. Indicate the approximate percentage of time spent in each (percentages should not be less than 5%). The percentage must total 100%.

Description of Responsibilities:	(%) Percent of Time
<p>Budget</p> <ul style="list-style-type: none">• Knowledge of standard theories, principles, practices, and techniques applicable to the programs to make recommendations regarding fiscal management.• Prepares initial budget annually (and for mid-year review) for the Director’s review by cost centers. Interacts with unit supervisors in determining fiscal budget requirements and projections.• Serves as liaison to the staff of the SDSU Human Resource and budget office in the Office of the Vice President of Student Affairs.• Works closely with Student Affairs Resource Management Director to ensure that all EOPOS budget and HR related issues are handled in the most fiscally responsible, accurate and timely manner.• Works closely with SACD RM to learn, interpret, and apply a wide variety of policies and procedures relating to and impacting the applicable program, organizational unit, and/or administrative specialty to stay in compliance with SACD and SDSU practices.• Attends trainings and professional development opportunities to learn and stay abreast of policies, procedures, and outside regulations which includes operational and fiscal analysis and techniques.• Works closely with the Director and SACD RM team to ensure work is accurately being managed and following current procedures and guidelines.• Coordinates, reconciles, and tracks all EOPOS, GS general funds, Compact Scholars and SDSU Foundation accounts and contracts.• Analyze budget and hiring data and make accurate projections using business mathematics and basic statistical techniques.• Prepares monthly reports for all accounts. Reconciles monthly reports to University SDSU Research Foundation and The Campanile Foundation accounting systems (Oracle and Banner) and researches and resolves any issues or discrepancies.• Orders necessary supplies, equipment, subscriptions, and memberships, etc. Researches, evaluates, and completes purchases.• Initiates necessary transfer of funds between accounts and reports transfers to the Director(s). Analyzes the various spending patterns	75%

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Description of Responsibilities:	(%) Percent of Time
<p>of all accounts, including anticipated personnel changes affecting funds, and makes appropriate recommendations to the Director(s).</p> <ul style="list-style-type: none"> • Coordinates all processing and tracking of purchase requisitions and purchase orders. Direct payments and Credit card transactions. Informs and requires staff to comply with budget expenditure limits, deadlines, and changes in purchasing policies. Interacts with supervisors regarding special requests and justifications for contracts, equipment, and supplies. • Supports the department’s procurement processes for specialized cases involving technology acquisition, equipment, renovations, space, and facilities requests. • Supervises maintenance of student assistant and work study budgets. Monitors procedures for tracking salary and step schedule for student employees and makes recommendations to the Director(s). Prepares monthly reports for the Director(s) on student assistant budget expenditures. • Performs analysis in preparing periodic reports with recommendations to the Director(s) regarding budget needs, spending patterns and possible cost savings. • Supports EOPOS staff with purchasing items for planned programs. This may include transporting to stores to make purchases. • Performs analysis of all program budgets against actual expenditures reconciling the spending patterns. • Gathers and analyzes data related to all EOP cost centers. • Establish and maintain effective working relationships within and outside EOPOS and SDSU and serve as a liaison and representative of SDSU EOPOS to all outside constituents. 	
<p>Personnel</p> <ul style="list-style-type: none"> • Coordinates budget and personnel records for 29+ full-time staff and approximately 150+ student employees. Implements and updates tracking systems for permanent and temporary positions. • Manages the processing and submission of monthly payroll for staff and student assistants and analyzes for accuracy. • Coordinates personnel and accounting records with respect to position conversions, job descriptions, leaves of absence, organizational charts, and overtime. Interacts with employees and Personnel Services in determining benefits eligibility and leaves of absence. Manages and prepares monthly status reports for the Director(s). • In collaboration with the EOPOS Operations Coordinator, oversees preparation of personnel requisitions and closely monitors filling 	20%

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Description of Responsibilities:	(%) Percent of Time
<p>vacant positions. Analyzes funding sources for position changes and advises Director(s).</p> <ul style="list-style-type: none"> • Works closely with the hiring manager when hiring new personnel and serves as a liaison with HR. Reviews, prepares and routes staff transaction forms, recruitment forms, organizational charts and all HR forms as needed. • Manages temporary help account and salary savings requirements. Prepares documents for position conversions and temporary help commitments, including calculation of time-base, pay, step, dates of conversion and salary adjustments. • Assists with training EOPOS staff on new skills and procedures implemented for SDSU and SACD and provide updated processes for the EOPOS team to follow to ensure the unit stays in compliance. • Prepares quarterly reports for the Director(s) on budgeted positions, temporary help conversions and commitments and salary savings. • Coordinates and is responsible for student assistant and work-study personnel and payroll to ensure department is not going over its allocations. 	
<p>Other duties as assigned:</p> <ul style="list-style-type: none"> • Attend/participate in staff meetings and events as required. • Serve as a responsible role model for student program participants. • Assist with planning annual events such as, but not limited to: <ul style="list-style-type: none"> ○ EOP First Contact ○ Explore SDSU Open House ○ EOPOS Graduation ○ EOPOS Welcome Week • Assist with other events, programs and activities as needed. 	5%
	100%

V. LEAD WORK DIRECTION OVER OTHERS:

List of individuals the incumbent supervises/leads. Indicate the type of supervision, whether direct (directly supervises the position and conducts performance evaluation) or general (acting in a lead capacity or assigning work).

Classification	Working Title	Type of work direction (Direct or General)
Student Assistant	Student Assistant	Hourly

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Type of supervision received by this position (check one):

Greatest amount of supervision; methods of performing tasks are well established; assistance readily available if a problem occurs.

Definite work objectives are set by the supervisor; the methods of performing tasks are frequently left to the judgment of the employee with a supervisor giving occasional instruction or advice on decisions.

Has responsibility for planning and organizing the methods and details for accomplishment; determines priorities; selects methodology from various approaches; recommends actions that may impact the work of others.

Responsibilities are defined by the scope of the function; responsible for formulating operational Policy for a separate, comprehensive, and diversified program; implements programs.

VI. POSITION REQUIREMENTS:

A. List education and years of experience required that are based on the classification standards.

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.

B. Skills, knowledge, and abilities required for this position that are based on the classification standards.

- Working knowledge of general practices, program, and/or administrative specialty.
- Basic knowledge of and ability to apply fundamental concepts.
- Working knowledge of budget policies and procedures.
- Ability to learn, interpret, and apply a wide variety of policies and procedures relating to and impacting the applicable program, organizational unit, and/or administrative specialty.
- 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 program or administrative specialty.
- Demonstrated ability to establish and maintain effective working relationships within and outside the work group and serve as a liaison for the organizational unit.

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C. Specialized skills required for this position.

(Skills/experience that are not listed in the CSU Classification and Qualification Standards but are required in order to perform the job.)

- Working knowledge of personnel policies and procedures.
- Ability to communicate effectively with various departments on campus.
- Knowledge of SDSU Budget and Finance policies and procedures regarding position conversions, deadlines, and reclassifications.
- Ability to oversee the processing of all purchase requisitions, to work independently, to make reliable decisions and recommendations.
- Skill in planning, organizing, coordination and performing work in situations where numerous demands are involved.

D. License and Certification Required (I.e., Driver's License and Grade, Certification, etc.)

- Driver's License (Class C)

VII. PREFERRED QUALIFICATIONS:



(Education, experience, knowledge, skills and/or abilities which are preferred but not required.)

- Experience working with a diverse population of students, staff, faculty, and administrator. General understanding of low-income and underserved communities.

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VIII. SIGNATURES:

The signature indicates position description is an accurate and correct statement of duties and responsibilities assigned to the position. (Limited to 3 Signers as listed below)

Incumbent's Signature/Acknowledgment		Date
		Oct 22, 2024
Appropriate Administrator Signature		Date
 <small>Glenn Perez (Oct 23, 2024 11:13 PDT)</small>		Oct 23, 2024
Classification & Compensation Services		Date

Signature: 
Email: mftaylor@sdsu.edu

Signature: 
Tonika Green (Oct 22, 2024 15:10 PDT)
Email: tduren@sdsu.edu

Signature: 
Email: jscatena@sdsu.edu

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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.

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 involves 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 the codes below for each of the items which most accurately describe 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

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

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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](#).

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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	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).
2. 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?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Access to Level Protected Level 1 Data: (i.e., Passwords, DOB, Credit Card Numbers, SSN's, Medical Data, Law Enforcement Records, etc.) - Link to or incorporate ICSUAM pages.
3. Does this position have access to student records?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	FERPA (Access to student education records)
4. Is the position responding for recording/reporting Clery Data?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	Clery Act Basics
5. Does the position have access to protected health information?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	HIPAA
6. Will this position be an active/participating member of the SDSU Emergency Operations Team?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	EOC Member
7. Does this position have responsibility for operating commercial vehicles, machinery or equipment that could pose environmental hazards or cause injury, illness, or death?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	Motor Vehicle Records/Licensing Check is required. CA Defensive Driver
8. Does the position influence or make decisions regarding real property, real property acquisitions and/or leaseholds, land use and/or development?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	COI CAT 1
9. Does the position influence or make decisions regarding the purchase of goods, service or construction work? Note: Having a procurement card is not qualifying if the individual is limited to making directed and supervised purchases from established vendors.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	COI CAT 2

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10. Does the position influence or make decisions regarding the investment of SDSU/CSU funds.	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	COI CAT 5
11. Does the position influence or make decisions regarding the sale of campus goods, services, products, or commodities (including agricultural commodities), which are sold by the campus?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	COI CAT 6

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Attachment C

Complete for **MPP Positions Only**

Mental Effort:

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

1=Never Occurs 2=Seldom Occurs 3=Sometimes Occurs 4=Occurs Often 5=Almost Always Occurs

<u>Planning</u>		<u>Staffing</u>	
	Forecast		Define Roles
	Set Program Goals		Give Input to Position Descriptions
	Determine Budget Allocations		Determine Selection Criteria
	Establish, Implement, Revise Policies		Recruit/Interview/Select
			Orient Staff
<u>Organization</u>		<u>Employee Relations</u>	
	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		
<u>Direction/Leadership/Supervision</u>		<u>Performance Evaluations</u>	
	Educate		Determine Performance Standards
	Delegate		Authorize/Approve Awards
	Coordinate		Prepare Performance Evaluations
	Coach/Train/Develop		Observe/Follow-Up on a Daily Basis
	Recommend Formal Training		Correct Work/Behavior Problems
	Motivate		
	Instruct/Demonstrate		
	Schedule Staff/Readjust Schedule		
<u>Organization</u>		<u>Other</u>	
	Describe Relationships Between Functions		
	Define Department/Divisional Structure		
	Establish Priorities to Meet Goals		
	Schedule Work for Employees		
	Establish deadlines		
	Implement procedures		
	Determine work methods		
	Balance multiple tasks/projects		

MPP Job Code:

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Attachment D

Department Organization Chart

Instruction: Please insert an image of your department's organization chart and highlight where this Position Description falls within the chart.

