



# 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- EX I	1038	2	2	LL	7/5/24

## 1. POSITION INFORMATION

Employee: \_\_\_\_\_ Department: CCE / Organizational Excellence & Leadership Program (CTOD)

Current Classification: AA/S – Ex I Working Title: Lead Program Management Specialist

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

Position Provides Lead Work Direction To:

Classification: _____	AA/S NE	Qty: _____	1	FTE: _____	1
Classification: _____	ASC II	Qty: _____	2	FTE: _____	2
Classification: _____	SA	Qty: _____	1	FTE: _____	0.5

Name & Title of Work Lead (if any): \_\_\_\_\_

Name & Title of Appropriate Administrator: Deborah Hunt, Chief Deputy Director, Organizational Excellence and Leadership

Name & Title of Dean/Manager (MPP): Jenni Murphy Dean, College of Continuing Education

## 2. PRIMARY ACTION BEING REQUESTED (Select One)

Job Posting:  New Position  Replacement Position, former incumbent: Monique Abed- 00010871

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: Deborah Hunt, PhD Date: Jul 30, 2024

Dean/Manager (MPP): Jenni Murphy Date: 07/31/2024

FOR HUMAN RESOURCES USE ONLY:	
APPROVED CLASSIFICATION	WORKING TITLE

#### 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 in both in-person and virtual conference and event planning, delivery, and pre- and post-event management
2. Experience in independent performance and responsibility for the planning, coordination, and completion of comprehensive in-person and virtual conferences and trainings
3. Experience in using Microsoft Office products (or equivalent programs for word processing, spreadsheets, and slideshow), virtual meeting platforms, and other project management databases and/or software
4. Experience in assessing needs from clients and determining feasibility of meeting those needs based on budget and available resources
5. Experience in monitoring project budgets
6. Experience in reviewing and negotiating facility/venue contracts
7. Experience in staff oversight or management

Knowledge, Skills, Abilities:

8. Project management and organizational skills in leading the planning and coordination of complex conferences, events, and/or training activities that involve many different tasks, competing priorities and timelines, and deliverables
9. Demonstrated ability to effectively interpret, organize, and present information and ideas in written or presentation form
10. Skills and abilities to provide project leadership or represent the work unit on key projects within and outside the organization
11. Considerable judgment and discretion reflective of a thorough knowledge of a professional conference or project manager, with policies and practices referenced for guidance
12. Effective interpersonal and communication skills with exceptional attention to detail in order to effectively interact with all levels of staff and external constituencies
13. Ability to take initiative and independently plan, organize, coordinate, and perform work to meet clients' needs and to continue to improve internal capacity and abilities
14. Understanding of and experience being quality-oriented and customer-centric (detailed, accurate, thorough, timely, meets deadlines, dependable, responsive, proactive)
15. Project budget management and expense tracking skills
16. Ability to train others on new skills and procedures and provide lead work direction.

FOR HUMAN RESOURCES USE ONLY:	
APPROVED CLASSIFICATION	WORKING TITLE

17. Commitment to maintaining a welcoming and inclusive work environment with diverse colleagues and constituents including faculty, students, staff, and members of the community.

Other Requirements:

- 18. Ability to work in evenings and weekends as needed
- 19. Ability to travel statewide, including overnight stays, to support the essential functions of the position

Conditions 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).

- 20. Seven plus (7+) years of experience in conference and/or event planning
- 21. Bachelor’s degree in a related discipline or completion of certificates or training in meeting or event planning
- 22. Certification in the Meeting Planning Industry and/or completion of conference planning coursework
- 23. Experience with online platforms for synchronous conference and training delivery
- 24. Experience working in a financially self-support organization

**6. POSITION SUMMARY**

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

Under the general direction of the senior staff of the Organizational Excellence & Leadership revenue center at the College of Continuing Education (CCE), the Lead Program Management Specialist is responsible for leading the planning and the delivery of educational services and programs for employers and organizations, including conferences, trainings, events, and other in-person and virtual education projects. The Lead Program Management Specialist is responsible for leading project planning; monitoring and evaluating project execution; tracking the progress and document outcome for reporting; and leading unit-wide initiatives and improvement projects;

The incumbent is part of the Organizational Excellence & Leadership revenue center with over 40 staff that aims to provide transformative opportunities for clients to solve organizational challenges by providing educational services and programs that lead to actionable solutions and sustainable outcomes. A commitment to quality and to providing the highest level of customer service possible are also requisites for this position.

**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%	Weekly/ As-Needed	<p><b>Project Development and Oversight</b></p> <ul style="list-style-type: none"> <li>- Meets with prospective organizational clients to build relationships and develop contract services.</li> <li>- Prepares proposals with scope of work for prospective clients and works with unit contract and financial specialist to develop budget for proposals.</li> </ul>

FOR HUMAN RESOURCES USE ONLY:	
APPROVED CLASSIFICATION	WORKING TITLE

20%	Daily	<ul style="list-style-type: none"> <li>- Oversees and maintains the full cycle of project development and execution, from initiation, planning, execution, to closing.</li> <li>- Builds collaborative relationships with clients and project partners to ensure successful delivery of project requirements.</li> <li>- Handles highly confidential information requiring a high degree of tact and discretion</li> <li>- Maintains fiscal oversight of projects; develops project budgets and forecasts.</li> <li>- Engages clients and partners in needs assessment and connects project success indicators to meeting those needs.</li> <li>- Negotiates and manages selection and implementation of service delivery formats including in-person, virtual, or a blended approach.</li> </ul> <p><b>Project Detail Planning</b></p> <ul style="list-style-type: none"> <li>- Creates work plans with roles, responsibilities, project tasks, deliverables, and timelines.</li> <li>- Approves appropriate resources for the service location and/or virtual platform.</li> <li>- Identifies, negotiates, and confirms speakers, moderators, facilitators, instructors, and/or vendors for the project.</li> <li>- Delegates tasks to appropriate team members and other CCE support staff and communicates project requirements and timeline.</li> <li>- Estimates workload of team members on each project and makes sure work hours stay within contract budgets</li> </ul>
20%	Daily	<p><b>Implementation Management</b></p> <ul style="list-style-type: none"> <li>- Serves as the lead project manager representing CCE and University.</li> <li>- Ensures compliance with policies and regulations of University, CCE, and facilities.</li> <li>- Monitors progress and performance of work provided by vendors and team members.</li> <li>- Maintains effective communications with clients and partners and handles all non-routine issues.</li> <li>- Oversees on-site project delivery for large, complex, high attendee events</li> <li>- Aggregates all costs related to materials and labor hours to ensure projects stay within budget.</li> </ul>
15%	Daily	<p><b>Lead Work Direction for the Team</b></p> <ul style="list-style-type: none"> <li>- Provides training and mentoring to team members; sets work priorities and timeline.</li> <li>- Serves as a resource to team members to resolve problems.</li> <li>- Seeks training and development opportunities to strengthen leadership skills and experience.</li> <li>- Reinforces University, CCE, and department values to create a welcoming and inclusive workplace environment.</li> </ul>
10%	Monthly/ As-Needed	<p><b>Project Reporting</b></p> <ul style="list-style-type: none"> <li>- Leads client debriefs and documents all feedback and lessons learned; provides reports as requested for client.</li> <li>- Performs final budget reconciliation for the training or event with the finance team members.</li> </ul>

FOR HUMAN RESOURCES USE ONLY:	
APPROVED CLASSIFICATION	WORKING TITLE

5%	Daily	<ul style="list-style-type: none"> <li>- Prepares post-project documentation as needed by University, CCE, and/or department.</li> </ul> <p><b>Organizational Citizenship</b></p> <ul style="list-style-type: none"> <li>- Shows a commitment to fostering a diverse, equitable, and inclusive work and learning environment</li> <li>- Maintains strong abilities to articulate and explain general University and CCE policies, procedures, services and programs, and organizational structure.</li> <li>- Promote and instill a strong culture of teamwork by working together safely, effectively, and respectfully with all associates.</li> <li>- Ensures continuity of services during periods of staffing shortages or unanticipated increases in unit workload.</li> <li>- Serves on organizational committees and work groups; participates in organizational events.</li> <li>- Participate in the development and implementation of diversity, equity, inclusion, and belonging practices.</li> <li>- Adhere to the “Hornet Honor Code” by actively promoting honesty, integrity, respect, and care for every person, ensuring a welcoming campus environment, and striving to help every member of our Hornet family, including partners, learners and clients, feel a strong sense of belonging.</li> </ul>
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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%	D,W,M	Other duties as assigned

## 9. ADDITIONAL INFORMATION

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

**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.

Work is performed independently under general direction related to goals. The incumbent’s responsibilities are completed using established policies and procedures. This position will also be responsible for documenting organizational policies, procedures and best practices. Review from work lead is sought for any extreme deviation prior to implementation. The work lead sets broad goals and objectives for the position. The incumbent may provide lead work direction and set project priorities to professional and support staff.

**9b. Problem Solving:** Types of problems encountered; issues, concerns addressed; types of problems incumbent required to refer to supervisor or others.

Incumbent has direct contact with clients, vendors, instructors, speakers, venue contract managers, learners, and attendees; incumbent must advise and forward to appropriate contact within CCE or campus department if issues

FOR HUMAN RESOURCES USE ONLY:	
APPROVED CLASSIFICATION	WORKING TITLE

arise. Concerns may include accomodation requests, contract negotiation, speaker/exhibitor/sponsor negotiation, instructor pay, student issues, and venue scheduling issues. Incumbent must troubleshoot any onsite facility issues if problems arise.

**9c. Contacts On- and Off-Campus:** Purpose and nature of working relationships with on- and off-campus contacts.

Other CCE staff: coordinate instructor pay and travel reimbursements, speaker contracts and travel arrangements/reimbursements, attendee registration, facility and technology requests, finance code approvals, and database mangement.

Instructors, speakers, and facilitators: screen and receive applications for potential instructors or speakers, coordinate materials for delivery, confirming and processing payment, and arranging and monitoring travel reimbursements.

Potential clients, contract clients and high profile government officials: develop regular communications with the client, and become familiar with client/departmental objectives, work style preferences and personalities.

Offsite conference facilities: coordinate, negotiate, and manage all program logistics with off-campus facilities.

**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	O	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)
O	Climb	F	Make decisions		
F	Reach	F	Works rapidly	F	Drives motorized equipment
O	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		Other:		
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				
O	Lift: 25 lbs. max				
O	Carry: 25 lbs. max				
O	Operate equipment				
F	Perform keyboard entry				
	Other:				

<b>FOR HUMAN RESOURCES USE ONLY:</b>	
APPROVED CLASSIFICATION	WORKING TITLE

**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