| **Position Number:** | 00004994 |
| --- | --- |
| **Working Title:** | Senior College Financial and Data Analyst |
| **Classification Title:** | Administrative Analyst/Specialist - Exempt III |
| **Job Code/Grade:** | 1038 / 4 |
| **Department ID/Name:** | 1171 / College of Engineering |
| **Appropriate Administrator Title/Position Number:** | Director of Resources and Operations / 00014535 |
| **Work Lead or Department Chair Title/Position Number:** | N/A |
| **Employee Name (once filled):** |       |
| **Employee 9-digit ID (once filled):** |       |

## POSITION PURPOSE

| San José State University’s Charles W. Davidson College of Engineering is an innovative, collaborative, and supportive environment that empowers employees to achieve professional and personal goals while contributing to the university’s student-centered mission. A member of the 23-campus California State university system, San José State University is situated in the entrepreneurial heart of Silicon Valley. The College of Engineering at San Jose State University comprises ten departments and independent programs which employs nearly 400 faculty and staff to support more than 7,000 local and international students. Committed to excellence and service, the expert staff of the College of Engineering frequently work with multiple external stakeholders and partners from across campus and other institutions. The College of Engineering’s Senior Financial and Data Analyst is a key member of the college’s resources and operations group. The Senior Financial and Data Analyst works collegially and cooperatively with employees of the college to perform duties under limited supervision, and works independently to achieve specified outcomes while reporting to the Director of Resources and Operations. The Senior College Financial and Data Analyst oversees the budget and financial affairs of the college to ensure proper financial management, working closely with the senior management team to maintain, enhance and grow the college's programs and financial objectives to achieve goals. The Senior Financial and Data Analyst performs a number of highly complex technical functions, using advanced fiscal analysis and projections for finding solutions to problems and developing new methods for execution. As the financial expert for the college, the Senior Financial and Data Analyst monitors and guides the college departments to appropriately manage their budgets and fiscal resources. The Senior Financial and Data Analyst oversees all college finances, including operating funds, PaCE funds, SSETF funds, and over 150 auxiliary accounts and advises the Dean and management team in making critical business decisions.The College of Engineering is committed to bringing anti-racism practices into services and operations. This position advances strategic initiatives and ensures day-to-day business functions are aligned with the core values of equity, diversity, inclusion, and accessibility.  |
| --- |

## TYPE OF SUPERVISION RECEIVED *(Select one and enter the number below)*

1. Direct Supervision: Work is performed according to detailed instructions and the supervision is available on short notice. The methods of work are well established and outlined. (Typical supervision for entry level, non-exempt positions)
2. General Supervision: Objectives are set for position, but incumbent works independently referring to policies, practices and procedures. (Typical supervision for mid-level exempt or non-exempt positions)
3. Limited Supervision: Incumbent proceeds on own initiative while complying with policies, practices and procedures described by the Supervisor. Incumbent seldom refers matters to supervisor except for clarification of policy. (Typical supervision for professional or advanced-level exempt positions)
4. General Direction: Incumbent has broad responsibility for planning, organizing and prioritizing work. Active control by the manager is only exercised on longer term goals and policy issues. (Typical supervision for middle managers and high level professionals)
5. Administrative Direction: Management decisions are comprehensive and the work function is broad. (Reserved for Administrator IV positions)

| 3) Limited Supervision |  |
| --- | --- |

## ESSENTIAL FUNCTIONS

| **Essential Functions and Associated Tasks** | **% of Time Annually** |
| --- | --- |
| **Financial Reporting, and Transactions:** * Prepares reports that outline and clarify the financial position of the college across multiple funding sources and auxiliary organizations.
* Generates all critical and significant correspondence relating to planning, development, and decision making within the college related to budget and financial matters.
* Develops and implements processes to audit transactions of departments while directing departments on processes to resolve any audit issues.
* Develops and designs database improvements, including reports for monitoring unit allocations.
* Represents the college on all financial and budget matters to constituents across the university, including Academic Business and Strategic Operations, and Finance and Business Services, College ofInformation, Data & Society, University Advancement, Tower Foundation, Research Foundation, industry partners, and other external entities and agencies.
* Reviews/approves financial transactions, including but not limited to, budget requests, travel transactions, and procurement/payment transactions for appropriate use of funding sources, compliance with university policies, and timely/accurate internal reporting.
* Processes financial transactions including but not limited to, budget/expense journals, expense transfers, HR expense adjustments, direct payments, reimbursements, invoicing, requisitions, and change orders.
 | 35 |
| **Budget Management and Planning:** * Advises the Dean and Director of Resources & Operations on sound fiscal practices and provides strategic guidance on managing the college’s annual operating fund budget, in excess of $20M.
* Collaborates with the Dean and Director of Resources & Operations to establish major economic objectives and advises in making important budget decisions.
* Serves as the key expert consultant in the college for other CSU campus programs, advising them in the development of their own off campus program model.
* Manages the quarterly projections and year-end closing processes.
 | 25 |
| **Data Analysis of Finance, Enrollment and Research Activities*** Performs research, analysis, development, evaluation, and implementation for the college’s critical programs, including collaborations with SJSU colleges, CSU entities, external academic institutions, and industry partners.
* Performs fiscal analysis related to budgets, funding, and critical projects involving the College.
* Analyzes and evaluates the impact of changes in the budget process.
* Collaborates with college and department representatives to study personnel data and conduct salary analysis, to ensure appropriate funding allocations.
* Oversees analysis of enrollment trends for all graduate and undergraduate programs in the college.
* Projects fiscal impacts based on enrollment and future enrollment targets of curricular programming.
* Moderates the collection and submission of data pertaining to faculty workloads, assigned time, and buyouts including tracking of projected salary expenditures.
* Analyzes data of faculty and student external grant submissions and research awards from the Research Foundation and Tower Foundation.
* Performs data analysis of metrics from student and faculty success programs to assess efficacy.
 | 15 |
| **Manages Compliance to Financial and Procurement Processes and Procedures:** * Provides leadership and training to the College’s department chairs and departmental administrative staff, providing expert advice and guidance to facilitate compliance to financially related policies and procedures.
* Develops and communicates methods for tracking and analyzing data.
* Leads process improvement efforts to develop new strategies and solutions related to the college’s business operations.
* Oversees the coordination of vendors, contracts, and insurance requirements, according to risk management guidelines.
* Audits the departments’ financial transactions to ensure compliance to the university’s policies and procedures.
 | 15 |
| *
 | 10 |
| Work Lead and Team Responsibilities* Provides back-up coverage and on-site supervision for dean’s office and departments within the college, as needed
* Provides leadership and work direction to a team of staff
* Oversees the performance of the work of others in order to maintain levels of productivity and quality
* Plans, organizes, sets priorities for, and delegates finance and purchasing services for the College of Engineering
* Communicates and participates as part of a team, which includes:
	+ Increases knowledge of team building skills,
	+ Establishes effective working relationships, and
	+ Works cooperatively with team members on projects
* Maintains flexibility and ability to adapt to change
* Attends, unit, college, division/campus, and system-wide meetings, including Academic Affairs Resource Team
* Participates on college/campus committees and task forces
* Serves on college/campus recruitment committees
* Attends appropriate training/information sessions
* Performs other duties as assigned
 | 10    |

The incumbent 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. Incumbent is also required to promptly report any knowledge of a possible Title IX related incident to the Title IX Office.

Percentages are used to classify the position. Actual amount of time spent on each Essential Function may vary based on department cycles and priorities. Other duties may be assigned by the Appropriate Administrator.

## KNOWLEDGE, SKILLS and ABILITIES

| Knowledge, Skills and Abilities required to perform the Essential Functions in Section C |
| --- |
| * Ability to work independently, as well as collaboratively with a team, as required.
* Extensive and in-depth knowledge of budgetary procedures, accepted accounting principles, and financial management practices.
* Ability to forecast and plan the use of revenue streams available to the College from all funding sources (including State General Funds, Trust Funds, external gifts, and contract awards) and advise the Dean on the use of these funds to meet the College’s short-term and long-term needs and development.
* Ability to understand and analyze complex problems from a future-oriented and broad interactive perspective.
* Ability to exercise initiative, flexibility, and substantial judgment and discretion.
* Expert knowledge of software applications: word processing, spreadsheet, presentation programs, database management.
* Ability to quickly learn PeopleSoft, Data Warehouse, and Common Finance System data management systems.
* Excellent oral and written communication skills.
* Working knowledge of public administration principles, practices, and methods.
* Demonstrated knowledge of English grammar, business writing, punctuation and spelling; ability to compose and appropriately format correspondence and reports.
* Excellent oral communication skills.
* Strong analytical and problem-solving skills.
* Ability to respond to problems quickly, exercising sound judgment, making constructive recommendations, interpreting and applying fiscal policies and procedures, and performing work in various situations where numerous and diverse demands are involved.
* Ability to perform in a detail-oriented environment.
* Ability to read, analyze, and interpret common technical concepts, reports and legal documents.
* Ability to quickly learn and apply a variety of state, federal, CSU, and SJSU policies and procedures.
* Ability to use expertise, persuasion and negotiation skills to build consensus to achieve short -and long-term goals and objectives.
* Ability to effectively communicate with and influence high-level and diverse contacts inside and outside of the organization
* Excellent customer service and public relations skills.
* Ability to effectively present information and respond to questions from groups of managers, customers, and the general public.
* Ability to maintain confidentiality and appropriately handle sensitive communications with employees and external agencies.
* Ability to train and supervise staff members.
 |

## CASH HANDLING

| Does this position handle cash? |
| --- |
| YesChoose an item. |

## NON-STUDENT POSITIONS MANAGED/LED BY INCUMBENT (if applicable)

| **Position Number** | **Classification/Working Title (to insert additional rows, click Tab in the last row)** |
| --- | --- |
| 00014249 | Associate Financial Analyst, AAS EX I |
| N/A | Financial Assistant – Tower Foundation |

## PHYSICAL DEMANDS and WORK ENVIRONMENT (include alternate work schedule when applicable)

| Describe the physical demands required of this position (e.g. lifting, sitting, standing) and the work environment (e.g. typical office environment, moderate noise level). If this position will work an alternate schedule (not M-F, nights, weekends) please include details. |
| --- |
| PHYSICAL DEMANDS:The physical demands described are representative of those that must be met by the employee to successfully perform the essential functions of the job. The position is required to work at a computer terminal and desk for long periods of time. May be required to travel between campus offices and off-campus locations. Must be able to bend and lift up to 20 pounds, pull/push heavy carts, and other equipment/materials. WORK ENVIRONMENTThis is a typical fast-paced office environment with high traffic volume and interruptions. This position requires an on-site presence.  |

## QUALIFICATIONS

| **Minimum Qualifications**(for non-MPP positions, UP will complete this section) | **Preferred Qualifications**(used for recruitment purposes only) |
| --- | --- |
| **Education**:       | **Education**:       |
| **Experience**:       | **Experience**:       |

## SIGNATURES (Enter names only; Signatures will be obtained when UP finalizes position description)

|  |  |  |  |
| --- | --- | --- | --- |
| EmployeeName/Signature: |       | Date Signed: |       |
| Appropriate Administrator Name/Signature: |       | Date Signed: |       |
| University Personnel Name/Signature: |       | Date Signed: |       |