



**POSITION DESCRIPTION / CLASSIFICATION REVIEW FORM**

The position description is the foundation for recruitment, determination of classification, formulation of work plans and the basis for performance management and evaluations. Supervisors are expected to review the position description with the employee: (1) when the employee begins the new assignment; (2) when the position description is revised; and (3) when the position is evaluated. Please note whenever there is a substantial change in the assignment, the position description should be revised and submitted to Human Resources to determine if there is a classification impact. This form is available on the HR webpage.

<b>Name of current incumbent (if filled position):</b>		<b>Date:</b> 10/14/2024
<i>If vacant, name of previous incumbent:</i> Scott Westall		
<b>Job (Classification) Code:</b> 3312	<b>Job Title:</b> Administrator II	<b>Position #:</b> 4776 <b>(HR use only)</b>
<b>Working Title (optional):</b> Director of Budgeting, Accounting & Reporting Services, Student Affairs		<input checked="" type="checkbox"/> <b>Exempt</b> <input type="checkbox"/> <b>Non-Exempt</b>
<b>Department ID:</b> D21132	<b>Department Name:</b> Budgeting, Accounting & Reporting Services, Student Affairs	<b>Time Base:</b> 1.0

**A. ACTION REQUESTED:**

Recruitment:

- New position
- Replacement:
  - No review required
  - Review needed – substantial changes made

Classification Review: (Section J required, Cabinet Officer signature required)

- Initiate classification review (Organizational Chart must be attached)
- Requested by:*  Employee  Supervisor/Administrator  CSU/HR

Update existing position description:

- No review required
- Review needed – substantial changes made

**B. SIGNATURES:** Signature denotes that this position description is an accurate statement of assigned duties. As a supervisor, if you are not in agreement with duties described, please attach additional sheet describing the differences which will be used for additional review by Human Resources. This job description supersedes all prior job descriptions and is intended to describe the general content and essential requirements for the position listed above. It is not an exhaustive statement of duties. Management reserves the right to add or change the duties of this position as required at any time.

\_\_\_\_\_  
(Employee) (Date)

\_\_\_\_\_  
(Supervisor) (Date)

\_\_\_\_\_  
(Appropriate Administrator) (Date)

\_\_\_\_\_  
(Cabinet Officer) req'd for classif. reviews (Date)

**C. POSITION PURPOSE:** Please describe the basic primary function(s) of the position – the reason the position exists. In order to provide an accurate description of the position, please do not copy duty statements from the CSU Classification Standards.

The Director of Budgeting, Accounting, and Reporting Services for Student Affairs reports to the Associate Vice President & Chief Accounting Officer, with a dotted line to the Vice President for Student Affairs. The position provides leadership and oversight for internal and external financial planning, budgeting (complex operations including, for example, athletics, housing, student housing, etc.), accounting, and reporting for the division of Student Affairs and related self-supporting enterprise activities and/or auxiliary organizations, if any, while assuring compliance with government, CSU system, university, and other rules, regulations, and policies. In addition, the incumbent will provide direct supervision and leadership to a team of professional staff.

**D. DUTIES AND RESPONSIBILITIES:** List 4 or 5 of the most significant or major duties in order of importance as well as marginal duties. Indicate the approximate percentage of time spent with percentages of no less than 5%. Total of all duties must add up to 100%.

1) MAJOR JOB DUTIES (Essential Functions)	PERCENTAGE %
A. Department Oversight and Leadership	60%
B. Staff Supervision/Management	30%
C. Disaster Service Worker	5%
 2) OTHER JOB DUTIES (Marginal Duties)	 5%
• Perform other job-related duties and special projects as assigned.	
• Attend training and maintain skill currency as appropriate to safely and effectively complete assignments.	

*The examples above illustrate typical work activities and are not meant to be all inclusive or restrictive.*

Total = 100%

DUTY STATEMENTS (give examples of tasks under each heading):

**A. Department Oversight and Leadership (60%)**

- a) Serves as the primary business administrative officer for the division of Student Affairs and participates in direct report management meetings with the Vice President for Student Affairs as appropriate.
- b) Serves as the primary business administrator accountable for the following:
  - i. Identification, definition, planning, budgeting, accounting, and reporting of all funds within the division of Student Affairs and related self-supporting enterprise activities and/or auxiliary organizations, to ensure that each fund is used strategically for the purpose intended, is operating within a reasonable annual budget variance, and is solvent with appropriate reserve balances.
  - ii. Making recommendations to the Vice President for Student Affairs on all division-wide budget activities, including providing financial and managerial analysis and related reporting that supports division-wide budgetary decisions including forecasting revenues and managing expenditures including position control (salaries and benefits) and operating expenditures.
  - iii. Providing budgeting, accounting, and reporting for the division of Student Affairs and related auxiliary organizations requiring comprehensive knowledge of government and not for profit accounting methods (i.e., GAAP, FASB, GASB, UPMIFA and OMB guidelines), and university budget policies and procedures.
  - iv. Preparing information for annual audit(s), including providing schedules and reports as appropriate, for the division of Student Affairs and related self-supporting enterprises and/or auxiliary organizations, if any.
- c) Collaborates with division-wide and campus-wide personnel and serves as a primary business administrator accountable to ensure appropriate internal controls are in place to safeguard assets, and to provide accurate and timely internal and external financial and managerial reporting.
- d) Leads and provides training to appropriate staff within the division of Student Affairs to ensure effective use of PeopleSoft and Questica, and/or similar or related reporting tools, to achieve appropriate reporting efficiencies and accountability.
- e) Oversees complex projects requiring considerable coordination with campus constituents as well as the CSU Chancellor's Office staff as appropriate.
- f) Exercises considerable discretionary decision making as it pertains to reviewing and preparing necessary journal entry transactions and planning daily tasks and work activities.
- g) Performs financial planning, budgeting, accounting, and reporting for the division of Student Affairs including:
  - i. Providing accurate and timely PeopleSoft and Questica, and/or similar or related data maintenance, transaction analysis, reconciliation activities, and related financial and managerial reporting.
  - ii. Providing recommendations to the Vice President for Student Affairs on how to best achieve strategic goals and ensure compliance with identified rules, regulations and/or policies.
- h) Responsible for the financial management of the California State University, Bakersfield, Student-centered Enterprises Inc. (SEI or auxiliary), Associated Students, California State University, Bakersfield, Inc. (ASI or auxiliary), and for

developing and implementing fiscal policies and procedures to ensure compliance with appropriate government regulations and related accounting pronouncements (GAAP, GASB, FASB, etc.), and accurate and timely cash management, financial and managerial reporting, and financial account closeout procedures.

**B. Staff Supervision/Management (30%)**

- a) Directly supervise staff through selecting, training, and disciplining as needed.
- b) Establish job standards and effectively evaluate staff through mentoring and training to ensure competence, efficiency, and professionalism to provide “best-in-class” service to internal and external customers.
- c) Plan, organize, and direct others in their work while providing leadership and encouragement of staff growth, cross-curricular experiences, and increased responsibility.

**C. Disaster Service Worker (5%)**

- a) All MPP employees are considered Disaster Service Workers, (CA Gov. Code Section 3100), and are required to attend trainings and possibly hold a position in the CSUB Emergency Operations Center (EOC), as assigned.

**E. REQUIRED QUALIFICATIONS:** These should match those listed on the classification standards. Any supplemental qualifications should be listed as “preferred”.

- 3) **EDUCATION AND EXPERIENCE:** Equivalent to a bachelor’s degree in accounting, finance, business administration or related field and five (5) years of professional level accounting experience in a high-volume automated accounting department. Experience should include managing and leading various classifications of employees.
- 4) **LICENSES, CERTIFICATES, CREDENTIALS:** Possession of a valid driver’s license or the ability to obtain by date of hire.
- 5) **SKILLS, KNOWLEDGE, ABILITIES (SKA’s):**
  - Regular and reliable attendance is required.
  - Strong analytical and critical thinking skills, and the ability to think strategically in the preparation, review, maintenance, and reporting of complex financial data.
  - Strong working knowledge of general accounting functions to include applicable rules, regulations, and internal controls.
  - Strong knowledge of GAAP as well as GASB and FASB standards for financial reporting.
  - Ability to build queries/reports and analyze systems and processes within an automated financial system with an emphasis on improved efficiency.
  - Management and leadership skills with the ability to be creative, make informed decisions, and inspire staff to perform successfully.
  - Demonstrated customer service experience requiring a very high level of diplomacy and professionalism.
  - Ability to use tact and diplomacy to effectively handle a broad range of high level and sensitive interpersonal situations with diverse personalities, and to respond appropriately to conflicts and problems.
  - Ability to initiate, establish, and foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in the University with the ability to establish and maintain effective working relationships within a diverse population and with those from various cultural backgrounds.
  - Excellent communication skills: ability to effectively communicate information in a clear and understandable manner, both verbally and in writing.
  - Thorough knowledge of English grammar, spelling and punctuation.
  - Ability to interpret, communicate and apply policies and procedures.
  - Demonstrated ability to maintain a high degree of confidentiality.
  - Excellent organizational and time management skills with the ability to set own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines.
  - Excellent computer skills and competence with a variety of computer applications including word-processing, spreadsheets, databases, on-line systems, Internet as well as online calendaring and email.
  - Working knowledge of or ability to quickly learn University infrastructure, policies, and procedures.

**F. PREFERRED QUALIFICATIONS:** Note any additional knowledge, skills, experience, certificates, education, or licenses that are desired for this position.

- Certified Public Accountant (CPA).
- Master’s degree in accounting or related field.
- Experience in public accounting, preferably at a California State University campus.
- Experience using PeopleSoft, Questica, and/or similar or related reporting tools.
- Experience with independent financial statements audit, including single audit, and/or other compliance auditing.
- Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.

**G. SPECIAL CONDITIONS:**

- Must be willing to travel and attend training programs off-site for occasional professional development.
- Must be able to work occasional holidays and adjust working hours to meet special jobs. May be called back periodically to perform work as needed on an emergency basis.

- **BACKGROUND CHECK:** Satisfactory completion of a background check (including a criminal records check) is required for employment. CSU will make a conditional offer of employment, which may be rescinded if the background check reveals disqualifying information, and/or it is discovered that the candidate knowingly withheld or falsified information. Failure to satisfactorily complete the background check may affect the continued employment of a current CSU employee who was conditionally offered the position.
- **SENSITIVE POSITION:** This position is considered a sensitive position. Sensitive positions are designated by the CSU as requiring heightened scrutiny of individuals holding the position, based on potential for harm to children, concerns for the safety and security of the people, animals, or property, or heightened risk of financial loss to the CSU or individuals in the university community.
- **MANDATED REPORTER: Limited:** The person holding this position is considered a limited 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.
- **DESIGNATED POSITION:** This position is currently on the List of Conflict of Interest Designated Positions for CSU Bakersfield. This requires the filing of a statement of Economic Interest on an annual basis and the completion of training within 6 months of assuming office and every two years thereafter.
- **EQUAL EMPLOYMENT OPPORTUNITY:** This University is committed to Equal Employment Opportunity. Applicants will be considered without regard to gender, race, age, color, religion, national origin, sexual orientation, genetic information, marital status, disability or covered veteran status.

**H. PHYSICAL DEMANDS & WORK ENVIRONMENT (must be completed):**

Indicate the type of physical effort which is essential to the position activities:

- SEDENTARY WORK** – involves mainly sitting; minimal walking and standing; lifting light weight objects limited to 15 pounds.
- LIGHT WORK** – involves mainly sitting, up to 25% standing or walking; lifting medium weight objects limited to 25 pounds.
- MEDIUM WORK** – up to 40% of the activities involve sitting, standing, squatting, kneeling or walking; lifting heavy weight objects limited to 50 pounds; may involve pushing and pulling objects within the weight limits.
- HEAVY WORK** – 50% or more of the activities involve walking, standing, squatting, kneeling or climbing; lifting heavy weight objects which may exceed 50 pounds.

Indicate the type(s) of environmental factors which are essential to the position activities:

- Is exposed to excessive noise
- Is around moving machinery
- Is exposed to marked changes in temperature and/or humidity
- Is exposed to dust, fumes, gases, or radiation, microwave
- Drives motorized equipment
- Works in confined quarters
- Works in high places
- Other:
- N/A

**I. SUPERVISION:**

**Supervision Received:** Describe the nature of supervision the employee in the position will receive.

- Direct Supervision - Employee receives immediate, close and regular supervision
- General Supervision - Employee receives some delegation of responsibility and independence
- General Direction – Employee functions independently under broad guidelines
- Administrative Direction – Responsibilities are defined by the scope of the organizational functions; responsible for formulating operational policies for a comprehensive and diversified program; makes top level management decisions. (Management Only)

<b>Name of Supervisor:</b> Heather Macaulay	<b>Job (Classification)Title:</b> Interim Associate Vice President & Chief Accounting Officer, Administrator III
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**Supervision Given:** List name(s) and title(s) of employee(s) that this position will supervise directly (if applicable):

<b>Name:</b>	<b>Job (Classification)Title:</b>
Kathryn Parry	Accountant III
Nicole Hernandez	Accountant II
Karl Pascua	Accountant I
Elana Moreno	Administrative Analyst/Specialist Exempt I

**J. CLASSIFICATION REVIEW REQUESTS:** If this is an existing position that you believe has changed, describe what is different about the assignment in terms of responsibility, complexity, authority, and skill levels. In order to assist you with this analysis, please answer the following questions. **Include organizational chart.** If necessary, attach additional sheets.

1. Which parts of the assignment are the most difficult and/or require the greatest skill to perform? Why? Please give examples.
2. To what extent do the duties of this position involve independent action or require decisions on the part of the person in the position? Which, if any, are the most difficult, and how frequently do they occur?
3. What would be the probable result of a poor judgment, decision, or action by the person in this position? How would these errors be detected? What would be the consequence of the errors?
4. How is work assigned to this position? To what extent does the person in this position have authority to determine what is to be done and when?
5. In what way is the work of this position reviewed? That is, is work spot-checked or is all work reviewed? Are there standardized controls or checks which would normally catch errors made by the person in the position? Please explain.
6. Do you assist in developing departmental policy? If yes, please explain.
7. Does this position have supervisory responsibility? Please specify.

**Additional comments: (optional)** Clarify duties assigned and/or include any additional information that you think would be helpful in the review of this position.