



## POSITION DESCRIPTION

Department:	Office of Writing and Learning
Classification Title:	Administrative Analyst/Specialist, Non-Exempt, I
Working Title:	Budget and Administrative Analyst for Writing and Learning
FLSA Status:	<input checked="" type="checkbox"/> Non-Exempt <input type="checkbox"/> Exempt
Incumbent:	

### Position Summary

As the primary academic support department on campus, the Office of Writing and Learning fosters learning and achievement by coordinating a comprehensive menu of programs and services that operate under three dynamic units: Academic Preparation and Transitions, Learning Support Programs, and Writing Across the Curriculum. These units are designed to enhance student success and retention by addressing equity gaps, optimizing learning, and supporting the diverse needs of Cal Poly students.

Under the general supervision of the Executive Director for Writing and Learning, the incumbent in this position provides all facets of budget and program data analysis as well as administrative assistance in matters related to the day-to-day operations and communications for all programs under the Office of Writing and Learning's three units. This position is also responsible for providing executive-level assistance in direct support to the executive director including matters that involve the application of policies and resolution of complex problems and sensitive matters. This position involves the research, analysis, design, implementation, and evaluation of various administrative systems to support unit operations; plays a critical and technical role in budget, data, and personnel management; and fosters connections among staff and a range of campuswide stakeholders, including students and faculty.

### Duties and Responsibilities

The following examples illustrate typical work activities and are not meant to be all inclusive or restrictive:

Essential Job Functions	Daily	90%
1. Manage the Office of Writing and Learning budgets, which includes multiple state, lottery, fee, and grant-based funding accounts; prepare monthly budget projections and evaluate the impact of expenditures, projects, and existing programs; discuss projections, cost implications, options, and recommendations with management; assist in all phases of budget planning and administration to ensure strategic and efficient use of resources.		
2. Monitor and reconcile monthly accounting activity including expense and payroll adjustments; report on weekly and monthly budget activity; and report on monthly, quarterly, and annual reconciliation reports.		
3. Reconcile purchase orders, receipts for goods and services, payments, department expenditure transfers, cost recovery charges, and University reports and budgets with the unit's internal accounting system; monitor encumbrances and open purchase orders; resolve problems related to purchase orders, process change orders, and handle direct buy invoices; monitor requisitions through receipt and payment for goods or services through invoicing; process, monitor, and reconcile all purchasing and procurement card usage; process direct buys, check requests, and fund transfers.		
4. Create and monitor requisitions for and follow up on purchase of office equipment, including computers and services working closely with all units/vendors involved; work with campus partners, e.g., Facilities, to facilitate office needs and improvements; request work orders and work with project managers once work order has been established.		
5. Access and extract online and organizational data, request accurate ad hoc data, conduct research and collect other data as needed in support of Office of Writing and Learning units, services, and initiatives (e.g., academic preparation and placement data of first-year students, GPA equity gaps and DFW rates in critical courses, and written communication competency).		
6. Track and assess key factors leading to or inhibiting student success, retention, and persistence to graduation in collaboration with Office of Writing and Learning managers and program coordinators;		

- analyze data to make inferences and recommendations on continuous improvement for Office of Writing and Learning units and services.
7. Prepare reports and develop presentations using tools such as PolyData Dashboards and/or Excel as requested; contribute accurate data and information for Office of Writing and Learning assessment efforts, University reporting requests, and other publications and reports.
  8. Understand and ensure compliance with relevant CSU and University financial and data management policies and procedures; interpret and explain policies to staff, faculty, and students.
  9. Provide executive-level administrative support to the executive director. Maintain a detailed calendar of the Executive Director.
  10. Provide administrative support to the writing across the curriculum manager, including offering clerical support for the GWR Advisory Board by scheduling meetings, preparing materials, and maintaining records; answering questions from students, faculty, and staff regarding GWR policies and practices; assisting with outreach to students who are eligible to fulfill the GWR and communications to students enrolled in GWR-designated courses; supporting the coordination and assessment of UNIV 401: GWR Portfolio course materials; and entering end of term data to verify students have satisfied the GWR.
  11. Serve as the academic scheduler for all OWL units, using CLSS and dashboards to schedule, proof, and monitor enrollment for math and science supplemental workshops, writing support courses, tutor training courses, and UNIV 401: GWR Portfolio sections; assist managers and program coordinators with permission numbers for all OWL associated courses.
  12. Serve as the primary personnel and payroll specialist for all Office of Writing and Learning units; track and monitor professional and student staff recruitment and hiring processes, in range progressions, and reclassifications in collaboration with Office of Writing and Learning managers, HR, and Academic Personnel; assist Office of Writing and Learning management and program coordinators with employee on-boarding; monitor and approve monthly payroll for approximately 200 student employees associated with all Office of Writing and Learning units; review and reconcile staff leave time, clarifying inconsistencies and notifying managers when reconciled.
  13. Monitor and process staff travel requests and expense reports in Concur and assist staff with Concur system.
  14. Maintain ongoing fiscal, personnel, and operational record-keeping history to assist the executive director with long-range planning.
  15. Develop the Business Process Guide for all processes within this role; recommend process changes when inefficiencies exist.
  16. Serve as liaison between students, faculty, staff, and/or administrators to translate and convey the ideas, needs, and concepts of Office of Writing and Learning units, services, and projects and to troubleshoot problems; represent the office on various committees, as needed.

#### **Related Job Functions**

**As Needed**

**10%**

- Plan staff meetings, department retreats, guest speakers, and other events.
- Update web content.
- Attend trainings, implement new processes and technologies as they are introduced, and promote their effective use within Office of Writing and Learning departments.
- Perform other job-related duties and special projects as assigned.

#### **Required Education, Experience, and Credentials**

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##### Education and Experience:

- Equivalent to graduation from a four-year college or university. One year of technical or administrative experience. A graduate degree in a related field may be substituted for one year of the required experience. Additional qualifying experience may be substituted for the required education on a year-for-year basis.

##### Licenses, Certificates, Credentials:

- Possession of a valid driver's license or the ability to obtain by date of hire.

#### **Required Skills, Knowledge, and Abilities**

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1. Working knowledge of operational and fiscal analysis techniques.
2. Expertise in investigating and analyzing problems with a broad administrative impact; ability to

- anticipate problems and address them proactively.
3. Demonstrated ability to interpret, communicate, retain, and apply a wide variety of academic policies and procedures and understand the underlying intent when processing exceptions and/or requesting exceptions to be reviewed or approved.
  4. Strong analytical and data interpretation skills; detail-oriented, creative, inquisitive, persistent, and self-motivated in applying research and analytical abilities in meaningful ways to support student success and retention.
  5. Demonstrated strong attention to detail with the ability to enter data accurately and create accurate data queries.
  6. Skill in effectively interpreting, analyzing, organizing, and presenting complex financial data and information. Ability to analyze data and make accurate projections using business mathematics and basic statistical techniques.
  7. Skill in the research, development and evaluation of data, policies and programs and procedures, including skill in the collection, evaluation, and interpretation of data to develop sound conclusions and make appropriate recommendations.
  8. Ability to produce highly readable, informative reports for a variety of audiences, including non-technical users.
  9. Demonstrated ability to take initiative, make independent decisions, and exercise sound judgment in planning, organizing, coordinating, and performing work in various situations where numerous and diverse demands are involved, in a busy office environment with overlapping deadlines and constant interruptions.
  10. Ability to adhere to the established policies related to Cal Poly data, screen security and confidentiality.
  11. Demonstrated success in maintaining confidentiality and handling sensitive information and situations utilizing professionalism in effectively dealing with a broad range of interpersonal contacts, including those at a higher level.
  12. Demonstrated ability to update documentation of procedures; clearly and professionally compose correspondence, compile, write and present reports.
  13. Demonstrated ability to reason logically, make independent decisions, exercise sound judgment, analyze operational and procedural problems and develop, recommend, and evaluate proposed solutions.
  14. Ability to foster communication and teamwork by maintaining a positive, cooperative, productive work atmosphere in and outside the Office of Writing and Learning, serving as a liaison between students, faculty, staff, and administrators.
  15. Ability and skill in communicating effectively both orally and in writing in a clear and understandable manner.
  16. Excellent proofreading skills with a thorough mastery of English grammar, punctuation, and spelling and a high attention to detail.
  17. Excellent organizational and time management skills with the ability to set own priorities to coordinate multiple assignments with fluctuating and time-sensitive deadlines.
  18. Excellent computer skills with proficiency in spreadsheets, databases, word processing on-line systems, email and calendars, internet, and search engines.
  19. Ability to learn, adapt to and train others in the use of ever-changing technology, systems, and software.
  20. Ability to proficiently operate standard office equipment including trouble-shooting problems with equipment.
  21. Experience working with individuals from various cultural backgrounds and marginalized populations, and a demonstrated inclusive mindset in the workplace.
  22. Working knowledge of or ability to quickly learn University infrastructure, policies, and procedures.
  23. Ability to work occasional evenings and weekends.

### **Preferred Skills and Experience**

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- Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.
- Proficiency and experience with the PeopleSoft Financial Administration system.

### **Special Conditions**

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- Must be able to work overtime, occasional holidays, and adjust working hours to meet special jobs; may be called back periodically to perform work as needed on an emergency basis.

- Must be willing to travel and attend training programs off-site for occasional professional development.
- Must be able to successfully pass a pre-employment background/fingerprint check.
- 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.
- This position classification has been defined as non-exempt and is subject to overtime provisions of the Fair Labor Standards Act (FLSA).

**INCUMBENT:** I have read this position description and understand its contents.

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INCUMBENT NAME	SIGNATURE	DATE
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**SUPERVISOR:** I certify that all statements on this form are complete and accurate.

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IMMEDIATE SUPERVISOR NAME AND SIGNATURE TITLE	DATE
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**DEAN/DEPARTMENT HEAD:** I certify that all statements on this form are complete and accurate.

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DEAN/DEPARTMENT HEAD NAME AND SIGNATURE TITLE	DATE
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**HUMAN RESOURCES USE ONLY**

Employee ID#: _____	REQUEST FOR:	CLASSIFICATION INFORMATION
Position Number: _____	<input type="checkbox"/> Update Review for File	Classification Title: AA/S Non-Exempt, I
FTE: _____	<input type="checkbox"/> Classification Review	Class Code/Range: 1038 - I
<input type="checkbox"/> Permanent	<input type="checkbox"/> New Position	CBID: R-09
<input type="checkbox"/> Temporary	<input type="checkbox"/> Replacement	MPP Job Code: n/a
<input type="checkbox"/> COI Position	Recruitment	Classifier Initials: HR
Recruitment Number: _____	Recruitment	Date: 7/11/24