



## POSITION DESCRIPTION

Department:	University Housing - Business and Financial Services
Classification Title:	Administrative Analyst/Specialist – Exempt I
Working Title:	Lead Business Services Analyst
FLSA Status:	<input type="checkbox"/> Non-Exempt <input checked="" type="checkbox"/> Exempt
Incumbent:	

### Position Summary

University Housing (UH), a unit within the Division of Student Affairs, consists of Facilities Operations, Housing Administration, Custodial Operations, Diversity and Inclusion, and Residential Student Experience. University Housing provides a premier living and learning experience for over 8800 students in residence hall and apartment-style communities. University Housing’s mission is to create a diverse and engaging experience that inspires all residents to Learn by Living.

The incumbent in this position is a member of the University Housing team. In conjunction with the Executive Director, Associate Directors and other managers, staff, and students, this position assists in carrying out the mission and philosophy of University Housing. The incumbent is responsible for supporting and contributing to an atmosphere that facilitates respect, inclusion, and collaboration.

Under the general direction of the Director of Business & Finance for University Housing, the Lead Business Services Analyst independently provides specialized administrative, consultative, and analytical support for Business & Finance matters. This position assists in the accurate and timely completion of financial processes; gathers and provides financial and statistical information; and analyzes financial data, patterns and projections; the incumbent leads or coordinates complex and long-term projects supporting UH initiatives and presents information and ideas in written or presentation form.

### Duties and Responsibilities

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

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|-------------------------|-------|-----|
| Essential Job Functions | Daily | 90% |
|-------------------------|-------|-----|
1. Lead an assigned team, including developing, administering, and supporting resource management for assigned activities, such as travel, procurement, event coordination, risk management, technology equipment management and payroll. Provide broad program responsibility to support UH leadership.
  2. Maintain understanding of current VPSA and campus policies and serve as a resource for staff to clarify policies and practices in the areas of travel, procurement, invoice approval, payment processing, budget authorization, recruitment, payroll and others.
  3. Create, edit, proof, and/or analyze detailed financial reports and budget projections for a variety of users. Assist in ensuring all department budget and fiscal procedures and deadlines are met.
  4. Research, collect, and present data related to UH projects, reports, programs, operations, services, and initiatives.
  5. Proactively analyze and recommend new and innovative approaches to improve existing processes and workflows.
  6. Document and maintain accurate files for reference materials, procedural guidelines, historical information, and current policies, practices, and procedures.
  7. Advise management and staff on use of software systems as they pertain to business operations and financials, troubleshoot access and navigation issues and process report requests, assist in the development of documentation for user guides and training materials.
  8. Troubleshoot and resolve complex fiscal problems; make appropriate adjustments, reconcile various fiscal reports to ensure accurate accounting, and escalate issues or concerns.

9. Serve as liaison between UH and campus partners to ensure timely processing of financial actions, accuracy of posted transactions, and resolution of discrepancies including verification that revisions have been made.
10. Prepare forms, compose appropriate cover memoranda, and create templates for future use to facilitate actions based on knowledge of policy and practice.
11. Analyze invoices for rate accuracy and scope and ensure that previous payment and remaining balances correspond with accounting records.
12. Approve and reconcile purchase order payments, which involves the investigation of discrepancies, determination of remedies, and implementation of corrections.
13. Ensure campus and CSU policies and guidelines are met.
14. Maintain confidential information; securely store and report potential breaches to supervisor.
15. Oversee and/or perform transactional processes using established guidelines and standards. This may include but is not limited to transactions such as deposit of cash receipts, travel, procurement card reconciliation and payment, invoice payments, expenditure transfers, campus chargebacks and budget transfers.
16. Create and use spreadsheets; access, extract and analyze online data, and make inferences and recommendations; develop reports using all reporting tools available.
17. Support UH's assessment efforts by providing accurate and timely responses to reporting requests, conducting research, preparing reports, and developing presentations. Distribute reports to management according to established timelines.
18. Participate in implementation of new processes and technology as systems are introduced and promote their effective use in UH.
19. Assist and participate with UH special events including move-in, move-out and open house.
20. Participate in diversity, equity, and inclusion training curriculum.

Related Job Functions

As Needed

10%

- Perform other job-related duties and special projects as assigned.
- Attend training and maintain skill currency as appropriate to safely and effectively complete assignments.
- Provide general administrative support for the office, screening phone calls for executive staff and program directors, as well as visitors that come into the office, provide referrals where necessary, and independently research matters to respond to inquiries.
- Supervise student assistants on projects and assignments.

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

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Education and Experience:

- Equivalent to graduation from a four-year college or university. Three years 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 it by date of hire.

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

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- Working knowledge of operational and fiscal principles, techniques, and best practices.
- Demonstrated skill in investigating and analyzing problems with a broad administrative impact and implications. Ability to anticipate problems and address them proactively.
- Knowledge of, or the ability to quickly learn and apply, college, university, and CSU policies and procedures, Cal Poly Campus Administrative Policies (CAP), Collective Bargaining Agreements, Executive Orders and Coded Memoranda.
- Knowledge of or ability to learn and apply Cal Poly and CSU policies and procedures for budget and financial activities.

- Strong analytical skills and the ability to gather, interpret and assess information and data in support of recommendations; ability to understand and analyze problems from a broad, proactive approach.
- Ability to work with significant autonomy and exercise a high level of independent thinking and creativity.
- Demonstrated skill in training/instructing others on new skills and procedures and ability to provide lead work direction.
- Ability to analyze operational and procedural problems and develop, recommend, and evaluate proposed solutions. Ability to use ingenuity and perspective when considering problems and recommending solutions.
- Ability to use initiative and judgment in analyzing information and determining a course of action.
- Demonstrated ability in maintaining strict confidentiality and sensitivity.
- Demonstrated ability to compile and maintain complex and extensive records and prepare reports and summaries; ability to effectively write and present own reports.
- Working knowledge of and ability to apply standard theories, principles, practices, and techniques in the research, collection, evaluation and interpretation of fiscal and administrative data and information from a wide variety of sources to develop conclusions and make appropriate recommendations.
- Ability to recognize and communicate deviations from established policies and procedures. This includes the capacity to assess, formulate and evaluate the impact of new or changed policies and their effects on administrative functions.
- Demonstrated ability to take initiative and independently organize and plan work, including handling multiple priorities, meeting deadlines, and determining priorities. Strong organizational skills, with the ability to work independently with limited supervision or as part of a team.
- Excellent computer skills and proficiency with a variety of computer applications including word-processing, spreadsheets, presentation, databases, online systems, and Internet as well as online calendaring and email.
- Demonstrated ability and capacity to learn and adapt quickly to new technology, software, situations, methods and procedures.
- Thorough mastery of English grammar, spelling, and punctuation; excellent proofreading skills; ability to perform very detailed work with a high degree of accuracy and attention to detail.
- Demonstrated oral and written communication skills. Demonstrated ability to effectively communicate complex information to a diverse audience.
- Ability to analyze data and make accurate projections using business mathematics and basic statistical techniques.
- Working knowledge and experience in general administrative practices.
- Demonstrated ability to effectively interpret, organize, and present information and ideas in written or presentation form.
- Demonstrated ability to establish and maintain effective working relationships with others; exercise tact, courtesy, alertness, and good judgment when responding to others.
- Demonstrated ability to maintain a positive, cooperative, productive work atmosphere while also sustaining relationships within a diverse population and with those from various cultural backgrounds.
- Ability to understand problems from a broad perspective and anticipate the impact of office administration problems and solutions on other areas.
- Ability to participate in planning and development activities and determine methods to meet programmatic or administrative goals.

### **Preferred Skills and Experience**

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- Experience working in an office environment.
- Demonstrated skills in an institutional/educational environment utilizing a customer-oriented and service-centered attitude.
- Experience using enterprise fiscal management, or financial reporting tools.

### **Special Conditions**

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- Must be willing to travel and attend training programs off-site for occasional professional development.
- 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.
- 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 Revised July 21, 2017, as a condition of employment.
- Must be able to successfully pass a pre-employment background/fingerprint check.
- This position classification has been defined as Exempt and is not 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.

Carla Wharton, Director of Business & Finance

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

Juliette Duke, Exec Dir of University Housing

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DEPARTMENT HEAD NAME AND TITLE	SIGNATURE	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: Admin Analyst/Specialist
FTE: _____	<input type="checkbox"/> Classification Review	Class Code/Range: 1038_02
<input type="checkbox"/> Permanent	<input type="checkbox"/> New Position Recruitment	CBID: R09
<input type="checkbox"/> Temporary	<input type="checkbox"/> Replacement Recruitment	MPP Job Code: n/a
<input type="checkbox"/> COI Position	<input type="checkbox"/> Limited	Classifier Initials: AT
Recruitment Number: _____	<input type="checkbox"/> General	Date: 5/9/2024