

THE CALIFORNIA STATE UNIVERSITY
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Date: May 24, 2006

Code: HR 2006-11

To: CSU Presidents

From: Jackie R. McClain
Vice Chancellor
Human Resources



Subject: **Administrative Analyst/Specialist – Classification and Qualification Standards**

Human Resources is pleased to announce implementation of a new “Exempt III” skill level for the Administrative Analyst/Specialist classification series (class codes 1036, 1037, 1038). Effective May 2, 2006, the Exempt III skill level has been incorporated into the Administrative Analyst/Specialist (AA/S) series (California State University Employees’ Union – Unit 9).

The following attachments are provided for your reference:

- Side Letter of Agreement (Attachment A)
- Implementation Instructions (Attachment B)
- AA/S Classification and Qualification Standards (Attachment C)

Implementation Agreement Highlights

- Employees may be appointed to the new skill level on or after May 2, 2006.
- The following 12-month salary ranges for the Exempt III skill level are effective May 2, 2006:

Salary Range Minimum:	\$5,400/month	\$64,800/year
SSI Maximum:	\$7,364/month	\$88,368/year
Salary Range Maximum:	\$8,700/month	\$104,400/year

- Campus management is responsible for reviewing current employees for placement in the AA/S classification, Exempt III skill level.
- Employees in an in-lieu classification with a higher SSI Maximum or Salary Range Maximum than that of the new AA/S classification, Exempt III skill level, may be grandfathered in the current classification to ensure no adverse impact; however, an employee may voluntarily elect to be reclassified to the AA/S, Exempt III skill level. The decision by an employee must be made by no later than thirty (30) days after notice of eligibility to be reclassified.

Distribution:

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For complete details regarding implementation of the AA/S Exempt III skill level, please refer to the attached Side Letter of Agreement and processing instructions.

Classification and qualification standards can be viewed and printed at Human Resources Classification Standards Web site: <http://www.calstate.edu/HRAAdm/Classification/index.shtml>.

Questions regarding this may be directed to Human Resources Administration at (562) 951-4411.

JRMcC/gc

Attachments

May 16, 2006

Administrative Analyst/Specialist EIII -- Implementation Side Letter of Agreement

Side Letter of Agreement
Administrative Analyst/Specialist Classification
Implementation of Exempt 3 Skill Level
Effective May 2, 2006

This Memorandum of Understanding constitutes the entire agreement between the California State University (CSU) and the California State University Employees' Union (CSUEU) relating to the implementation of the updated Administrative Analyst/Specialist (AAS) classification (class codes 1036, 1037, 1038). This agreement satisfies the meet and confer and all other bargaining obligations pursuant to HEERA and Article 17 of the parties Collective Bargaining Agreement on this issue. The CSU provided copies of the revised classification standard to CSUEU, which provided the basis for discussions between the parties pursuant to provision 17.12 of the Agreement.

In accordance with the foregoing the parties hereby agree as follows:

- The implementation date for the updated Administrative Analyst/Specialist classification series is May 2, 2006. The 12-month salary ranges for the Exempt 3 skill level are effective on May 2, 2006 and are as follows:

Minimum/Month	\$	5,400.00
Minimum/Annual	\$	64,800.00
SSI Max/Month:	\$	7,364.00
SSI Max/Annual:	\$	88,368.00
Maximum/Month:	\$	8,700.00
Maximum/Annual:	\$	104,400.00

Exempt 3 Skill Level Implementation

- Employees may be appointed to the new skill level on or after May 2, 2006.
- Campus management will review current employees for placement in the Administrative Analyst/Specialist classification, Exempt 3 skill level. Employees to be reviewed may be in the Administrative Analyst/Specialist, Exempt 2 skill level, or other "in lieu" classifications/skill levels. The reclassification provisions as outlined in Article 9 of the Agreement will apply for employees reclassified to the new Exempt 3 skill level.
- Seniority points for incumbents in in-lieu classifications will be transferred along with those transferred into the new AAS level EIII position. Seniority points for those employees promoted into this classification/skill level will be handled according to existing provisions in the Collective Bargaining Agreement.

**HR 2006-11
ATTACHMENT B**

PAY SCALES IMPACT:	
Change Summary:	Add Range 4
Class Code(s):	1036, 1037, and 1038
CBID:	R09
Pay Scales Effective Date:	05/02/06
Date in Production:	05/26/06
Pay Letter:	2006-03
EMPLOYMENT HISTORY (EH)/PAYROLL IMPACT:	
Processing Responsibility:	Campus
Processing Date(s):	At the discretion of the President
Effective Date:	05/02/06
PIMS Transaction:	A63
Detailed Transaction Code (Item 719)	N/A
EH Remarks (Item 215)	HR 2006-11
Pay Amount:	Pursuant to Article 9
Pay Form:	Base salary increase
Lump Sum Earnings ID:	N/A
Additional Information:	Anniversary Dates (Item 330) must be reviewed upon reclassification. Some Anniversary Dates may need to be adjusted, pursuant to Article 20 and the PIMS manual. The anniversary date must be in sync with the new SSI and range maximum.
SCO Personnel Letter:	N/A
COMMON MANAGEMENT SYSTEMS (CMS) INSTRUCTIONS:	
Pay Scales Impact:	Salary Schedule Load provided by HR-ISA to SOSS on 05/24/06.
GSI/SSI Load Impact:	N/A
Action/Reason:	Must map to PIMS A63 Transaction.



Administrative Analyst/Specialist

Class Codes: 1036 - 1037 - 1038

Date Established: 09-01-98

Date Revised: 05-02-06

OVERVIEW:

The Administrative Analyst/Specialist is a broad classification with four position skill levels. It is designed for positions covering a wide range of general and/or specialized administrative responsibilities in support of a program and/or organizational unit. The majority of work is administrative and analytical in nature with duties covering operational, policy and program research, analysis, reporting, and evaluation for the effective development and administration of programs or improvements to operational policies and procedures. Incumbents may also provide program administration or leadership. Responsibilities may include overseeing day-to-day administrative operations and providing lead work direction to others.

Position Skill Level - Non-Exempt - Incumbents in positions at this level serve primarily as individual contributors providing day-to-day administration of a program, and/or performing a variety of administrative and technical duties requiring knowledge of methods and procedures in support of an organizational unit. Administrative and analytical work relates primarily to operations and procedures.

Position Skill Level - Exempt I - Incumbents in positions at this level perform the full range of work related to program and policy research, analysis, development, evaluation, and/or operational and fiscal analysis related to an administrative specialty. Work requires applying a theoretical knowledge base to develop recommendations and conclusions. Incumbents often serve as program administrators.

Position Skill Level - Exempt II - Incumbents in positions at this level often provide program leadership of a strategic nature through program or organizational unit planning activities and the analysis, development, and evaluation of highly complex programs with broad impact.

Position Skill Level - Exempt III - Incumbents in positions at this level provide advanced-level functional expertise and leadership to a highly complex or critical program, specialty or organizational unit. Work is primarily strategic in nature with broad and far reaching impact at the campus and/or systemwide level.

DISTINGUISHING FEATURES:

Positions in this classification are distinguished by the level and scope of the administrative, analytical, and development responsibilities which require a more extensive and thorough knowledge of internal policies and procedures, and often require a professional foundation in applicable administrative theories, practices and procedures, or in a particular administrative or program specialty. Incumbents are often individual contributors, though the full scope of their duties may include providing lead work direction to others in the organizational unit.

Unlike the administrative support series, positions in the first level of this classification are not primarily responsible for leading or coordinating the clerical operations or support function for an organizational unit. In contrast, they are directly responsible for or participate in program administration or perform specialized or general duties related to the overall administrative operations of an organizational unit. Administrative operations include the range of activities related to directing the policy and affairs of an organizational unit such as fiscal and budgetary

analysis and management, personnel administration, program and policy research, development, implementation, and evaluation. Unlike positions in the Management Personnel Plan, positions in the higher skill levels of this classification are not assigned the full scope of supervisory and/or management authority.

CORE FUNCTIONS:

A position in the Administrative Analyst/Specialist classification may be focused in one program area and/or administrative specialty or may include more general duties crossing several programs or administrative specialties. Program areas and administrative specialties may include, but are not limited to, the following core areas:

Program Administration - Program areas cover the full range of administrative and/or academic functions. Duties include, but are not limited to: program and policy research, analysis, development, reporting, and evaluation; determining methods, policies, and procedures to achieve programmatic goals; leading related committees; ensuring compliance with applicable regulations or requirements governing the program; and serving as liaison to outside agencies or entities related to the program.

Administrative Specialties - Specialty areas include, but are not limited to, the following: financial analysis, planning, and fund management; budget analysis; accounting and administration; human resources and faculty relations; systems planning, development, and administration; office automation planning and coordination; market planning, analysis, and administration; facilities planning and administration; contract administration; construction coordination; emergency services and coordination; event planning and coordination; publications development and coordination; and university development functions.

General Administrative Functions - Duties include, but are not limited to, such functions as the analysis, design, implementation, and evaluation of various administrative systems to support organizational unit operations; advising management on policy and procedures related to finance, budgets, personnel, and related operational functions to meet programmatic goals; acting as an internal and external resource on policy and procedural matters; and leading or coordinating projects involving the management of external parties.

ENTRY QUALIFICATIONS:

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.

POSITION SKILL LEVELS:

Four position skill levels are defined within the classification. Progression from one position skill level to another within a classification is referred to as an in-classification progression. The factors used to determine position skill level include: complexity, scope, and impact of work; level, type, and scope of knowledge required to perform the work; autonomy exercised and level of supervision received; position accountability for work results; judgment and discretion exercised by the position; problem solving and analytical skills required by the work; level of creativity and ingenuity required by the work; and level and diversity of contacts and interactive capabilities required by the work.

A position is placed at a skill level based on where the majority of and/or most critical position responsibilities and skill requirements fall in relation to the position skill level definitions. Position responsibilities and their associated skill requirements are defined by management. It is important to note that the position skill level definitions do not delineate entry requirements at each level, but are composites of the typical position at each level. Entry qualifications are defined for entry to the first position skill level of the classification. Further progression within the classification depends first, on the need for a position at that skill level, second, on the duties and requirements of the position, and third, on an employee's demonstrated and applied skills and abilities.

POSITION SKILL LEVEL - NON-EXEMPT

Typical nature of work assignments:

- ◆ Performance of a variety of administrative, technical and analytical duties of limited to moderate complexity and/or day-to-day administration of a program within an organizational unit under general supervision. Work activities relate primarily to operations and procedures.
- ◆ Work is usually limited to immediate organizational unit, but may coordinate projects within or with other units. Assignments require handling of multiple work priorities and accountability for own work results.
- ◆ Assignments regularly require the use of independent judgment to make decisions, interpret, and apply a wide range of policies and procedures related to the program area and/or administrative specialties. Standard procedures and practices are followed.
- ◆ A wide range of administrative problems related to day-to-day work unit and program operations will require solutions. Precedents may often be relied on to determine appropriate solutions.
- ◆ Typically, the work requires limited innovation, but some ingenuity may be used to meet new needs.
- ◆ The work focuses primarily on own work assignments and projects, rather than lead work direction. However, duties may include overseeing clerical operations and providing lead direction to support staff.

Typical knowledge and skill requirements:

- ◆ Entry qualifications as described above.
- ◆ Working knowledge of general practices, program, and/or administrative specialty. Basic knowledge of and ability to apply fundamental concepts. Working knowledge of budget policies and procedures.
- ◆ Ability to learn, interpret, and apply a wide variety of policies and procedures relating to and impacting the applicable program, organizational unit, and/or administrative specialty.
- ◆ Knowledge of basic methods and procedures for research and statistical analysis and the ability to apply them.
- ◆ Ability to analyze data and make accurate projections using business mathematics and basic statistical techniques.
- ◆ Ability to organize and plan work and projects including handling multiple priorities.
- ◆ Ability to make independent decisions and exercise sound judgment.
- ◆ Ability to compile, write, and present reports related to program or administrative specialty.
- ◆ Demonstrated ability to establish and maintain effective working relationships within and outside the work group and serve as a liaison for the organizational unit.

POSITION SKILL LEVEL - EXEMPT I

Typical nature of work assignments:

- ◆ Independent performance of varied or specialized administrative and analytical duties and/or service as a program administrator. Work is reviewed against goals and involves independently planning and performing research and participating in the development, alteration, implementation, and evaluation of the organizational unit's and/or program's policies and procedures.
- ◆ Contribution to the completion of broader and more complex organizational or program projects and goals. Often provides project leadership or represents the work unit on key projects within and outside the organization.
- ◆ Accountable for own work results which are reviewed for soundness of judgment.
- ◆ Considerable judgment and discretion reflective of a thorough knowledge of a professional administrative specialty and/or program and/or policy areas need to be exercised. Policies and practices referenced for guidance.
- ◆ Analyze and address problems using reasoning and the interpretation and application of theories and principles to develop and recommend alternatives and best courses of action.

- ◆ Ingenuity in determining methods to achieve programmatic goals and develop and implement program policies required.
- ◆ Work requires coordination with individuals at all levels within the organization. As needed, acts as a representative to outside entities.
- ◆ As required, day-to-day program or work unit operations are overseen and lead work direction to administrative staff, including accountability for results, is provided.

In addition to Position Skill Level - Non-Exempt knowledge and skill requirements, work assignments typically require:

- ◆ Working knowledge of and ability to apply standard theories, principles, practices, and techniques applicable to the program and/or administrative specialty to develop conclusions and make recommendations.
- ◆ Thorough knowledge of policies, procedures, and outside regulations pertaining to the applicable program and/or administrative specialty.
- ◆ Working knowledge of operational and fiscal analysis and techniques.
- ◆ Ability to take initiative and independently plan, organize, coordinate, and perform work in various situations where numerous and diverse demands are involved.
- ◆ Skill in the research, development and evaluation of policies and programs, including skill in the collection, evaluation, and interpretation of data to develop sound conclusions and make appropriate recommendations.
- ◆ Expertise in investigating and analyzing problems with a broad administrative impact and implications. Ability to anticipate problems and address them proactively.
- ◆ Demonstrated ability to effectively interpret, organize, and present information and ideas in written or presentation form.
- ◆ Ability to train others on new skills and procedures and provide lead work direction.

POSITION SKILL LEVEL - EXEMPT II

Typical nature of work assignments:

- ◆ Under general direction, performance of administrative and/or program leadership in a large and/or complex organizational unit with broad impact. Required to assess, formulate, and evaluate the impact of recommended or implemented policies from a strategic and operational perspective. Work requires regular participation in planning and development activities and, as required, independent determination of methods to meet programmatic or administrative goals.
- ◆ Influence over key objectives and longer term goals of an organizational unit and/or program with high visibility or broad impact within and outside the organization.
- ◆ Independent determination of approaches to project and priorities. Work is reviewed against overall goals and objectives, with full accountability for results.
- ◆ Use of appreciable judgment in the development of policies and procedures related to issues frequently not covered by existing policies and procedures. Precedents and policies to guide development activities may be available for reference.
- ◆ Use of appreciable ingenuity and innovation to conceive of new approaches and solutions to address complex problems and issues.
- ◆ Serve as the prime contact for the program, specialty, and/or organizational unit. May manage relationships with outside entities or agencies and manage sensitive information and situations.
- ◆ May oversee day-to-day program or organizational unit operations and provide lead work direction to other professional or administrative staff, with accountability for results.

In addition to Position Skill Levels - Non-Exempt and Exempt I knowledge and skill requirements, work assignments typically require:

- ◆ Thorough knowledge of and ability to apply extensive expertise to complex programs and/or administrative specialties, including pertinent laws and regulations.
- ◆ Demonstrated expertise in and advanced knowledge of the principles, problems, and methods of public and business administration and operational and fiscal management.
- ◆ Expertise in administrative survey techniques, operations and systems analysis, statistical and research methods, and the ability to interpret and evaluate results to develop sound conclusions and recommend new or revised policies.
- ◆ Ability to understand problems from a broad, interactive perspective and discern applicable underlying principles to conceive of and develop strategic solutions.
- ◆ Ability to work with representatives from public and private entities and handle potentially sensitive situations. Demonstrated consultative skills in working with internal and external constituent groups.
- ◆ Ability to effectively present ideas and concepts in written or presentation format and use consultative and facilitation skills to gain consensus.

POSITION SKILL LEVEL - EXEMPT III

Typical nature of work assignments:

- ◆ Under general direction, performance of administrative and/or program leadership in a highly complex or critical program, specialty, and/or organizational unit having broad campus and potentially systemwide impact, requiring broad knowledge of organizational structures and systems. Performance of high-level and specialized functions involving the analysis, interpretation, integration, compilation, application, and presentation of complex data and information. Results are used for the development and implementation of new methods and strategic, long-term planning to meet programmatic and administrative goals.
- ◆ Serve as a key technical advisor to executives and management exercising considerable influence over strategic objectives and methods which have a broad and far reaching policy and operational impact.
- ◆ Independently manage and implement highly complex projects and business solutions with broad scope within and outside the organization. Impact is often both at the campus and systemwide level. Work is reviewed against demonstrated results.
- ◆ Use of substantial judgment in the analysis, interpretation, integration, and application of complex data and information and the subsequent development of policies and procedures. Precedents often do not exist and expertise and research must serve as reference guides.
- ◆ Lead business innovation and process improvement efforts, often developing new strategic approaches and solutions. Address problems from a broad interactive perspective using advanced research and analytical skills to conceive new solutions.
- ◆ Serve as the key contact and expert for a highly complex program, specialty, and/or organizational unit. Typically, maintains high-level and diverse contacts within the university system and with outside entities and agencies.
- ◆ Serve as a high-level individual contributor providing expertise and functional leadership and/or may oversee the day-to-day operations of the program or functional area including providing lead work direction to other professional and/or technical staff. Accountable for short- and long-term goals and objectives.

In addition to Position Skill Levels - Non-Exempt, Exempt I and Exempt II knowledge and skill requirements, work assignments typically require:

- ◆ Extensive and in-depth knowledge of and ability to apply expertise in the advanced theories, principles, methods and practices associated with the functional specialty, program, and/or organizational unit, including applicable internal policies and procedures and pertinent laws and regulations. Laws and regulations are highly complex and require substantial judgment and discretion in interpreting and applying them to the specialty or program area. Incumbents at this level often may have certification in a specialty area.

- ◆ Substantial and broad knowledge of public and private entities including their organizational and operating structures, internal systems, and functional areas, as well as the impact of critical external entities on an organization. Ability to integrate and apply this knowledge to anticipate problems and assess the impact of proposed solutions on various organizational areas.
- ◆ Extensive and in-depth knowledge in project management including research and analytical methodologies. Ability to interpret and integrate complex data and information to formulate appropriate courses of action which have broad and far reaching impact.
- ◆ Ability to understand and analyze complex problems from a future-oriented and broad interactive perspective and readily develop proactive solutions that integrate strategic goals into tactical operations.
- ◆ Ability to effectively use applicable information systems and applications in analysis, research, and reporting activities and projects.
- ◆ Ability to effectively communicate with and influence high-level and diverse contacts inside and outside of the CSU system.
- ◆ Ability to effectively use all communication methods and formats and to use expertise, as well as persuasion and negotiation skills, to build consensus to achieve short- and long-term goals and objectives.