

Date: December 17, 2010

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HR/PCOS 2010-02

To: Human Resources Directors

Response By: January 28, 2011

From: Evelyn Nazario
Assistant Vice Chancellor
Human Resources Management



Subject: Campus Review – Draft Accounting and Budget Analyst Classification Standards (Units 7 & 9)

Overview

Audience: Human Resources Directors, Classification/Compensation Managers, and campus management responsible for accounting and/or budgeting operations

Action Item: Review draft classification standards and provide feedback by January 28, 2011

Affected Employee

Group(s)/Unit(s): Employees in Accounting and Budget Analyst classifications in Units 7 & 9 (CSUEU)

Summary

This Technical Letter provides an overview of the revised Accounting and Budget Analyst Classification Standards and requests your review and feedback of the proposed drafts. The classifications in this study include: Accounting Clerk, Accounting Technician, Accountant, Assistant Budget Analyst and Associate Budget Analyst.

Study Background: Significant changes in the practices, regulations, and technology related to the field of accounting and budget analysis prompted both management and CSUEU to request a study of the following classifications:

- Accounting Clerk
- Accounting Technician I, II and III
- Accountant I and II
- Assistant Budget Analyst
- Associate Budget Analyst

The proposed draft classification standards were developed based on the results of an internal campus needs assessment survey as well as review by campus experts in the accounting and budget areas and human resource representatives.

Distribution:

CSU Presidents
Vice Chancellor, Human Resources

Vice Presidents, Administration
HR Professionals

Highlights of the Proposed Changes:

- Created Accountant III Classification:
Campus feedback received via the assessment survey indicated that some campuses use the Administrative Analyst/Specialist-Exempt II and III classifications to classify high-level individual contributor accountant positions responsible for advanced professional accounting work. The work is more advanced, in nature, than the Accountant II classification but does not qualify for inclusion in the Management and Personnel Plan (MPP). While the Accountant II classification is responsible for the full range of professional accounting work which requires a thorough knowledge of Generally Accepted Accounting Principles (GAAP), the proposed Accountant III classification will be responsible for advanced professional accounting work and will apply a comprehensive knowledge and understanding of GAAP to the resolution of a wide variety of complex accounting problems requiring substantial judgment and discretion. The incumbents will also serve as a high-level individual contributor providing expertise and/or provide lead work direction to other professional and/or technical staff.
- Combined Assistant Budget Analyst and Associate Budget Analyst into one series:
Several campuses commented via the assessment survey that the Assistant Budget Analyst and Associate Budget Analyst classifications should be combined into one series. Currently, they are considered separate classifications but they are in the same occupational grouping (H-4 Financial).

Campus Review: The draft Accounting and Budget Analyst Classification Standards are attached. Your review and feedback is critical to the development of the final classification standards and assists us in ensuring that the new classifications meet campuses' operational needs. As you review the attached drafts, please consider the following¹:

- Does the proposed standard adequately cover the breadth of work performed by incumbents today and potentially in the next five years?
- Are the skill levels properly defined? Are the distinctions between the skill levels clear?
- Are any critical core functions or work descriptions missing? If yes, please provide them.
- Are any critical knowledge, skills and abilities missing at any skill level? If yes, please provide them.
- Is the language in the classification standard flexible enough to accommodate ongoing changes in the industry and the differences in campus operations system wide?

Sending in Feedback: Thank you in advance for your time and effort in reviewing the draft classification standards. We look forward to hearing from you by Friday, January 28, 2011. We request that campus human resources coordinate their response with the appropriate campus management and submit consolidated feedback. Please provide written comments to Dawn McKinley, Sr. Manager, Compensation & HR Information Projects, via e-mail to dmckinley@calstate.edu.

Next Steps: Campus feedback will be reviewed and revisions will be made, as appropriate, after reviewing with the management advisory group. Salary ranges and impact to employees are subject to collective bargaining and will be addressed after the classification standards are finalized. Campus HR will be consulted and updated throughout the process.

If you have questions regarding this technical letter, please contact Dawn McKinley in Human Resources Management at (562) 951-4416.

EN/dm

Attachments

¹ Questions regarding salary ranges and impact to employees are subject to collective bargaining and will be addressed after the classification standards are finalized.

Draft Classification Standards – Rev. 11/22/10

Accounting Clerk

Class Code: 1733

OVERVIEW:

Accounting Clerks perform clerical duties of limited scope in support of an accounting or financial record-keeping function. Incumbents occupying this classification follow specific instructions and well-defined procedures.

The Accounting Clerk classification is distinguished from other clerical series by a primary responsibility for performing routine and repetitive financial or cash-related clerical duties. The Accounting Clerk classification is distinguished from the Accounting Technician series in that the Technician series has primary responsibility for providing technical support to functional units regarding receiving and disbursing university and/or auxiliary funds and recording financial transactions.

TYPICAL ACTIVITIES:

The following examples of typical work activities are meant to illustrate the general range of work functions performed by Accounting Clerks; they are not meant to be all-inclusive or restrictive. Work assignments may involve other related activities within the scope of this classification.

Accounting Clerks typically perform work involving some or all of the following duties: review repetitive financial documents for accuracy and completeness; make mathematical calculations; assign routine transaction codes by referring to lists, manuals, or other reference sources; receive money, make change, balance cash drawer, operate bulk coin counter and bulk currency counter; prepare receipts, disburse checks, and prepare daily deposits and perform less complex reconciliations; gather numerical data; post financial information where the identification and location of postings are clearly indicated; communicate established university policies and procedures to faculty, staff and general public, referring them to the appropriate staff member when more extensive interpretation is required; perform routine clerical functions such as sorting mail, data entry, greeting customers, answering phones and providing assistance, filing and using standard office equipment such as copy machines; provide routine assistance with web site applications; and use current computer word processing and spreadsheet software programs, web browsers, integrated financial systems and/or other types of records management systems, including student accounting, cashiering and student financial aid.

TYPICAL QUALIFICATIONS:

Knowledge and Abilities:

Working knowledge of mathematical and general office methods, practices, and procedures. Ability to learn basic financial record-keeping methods, procedures, and practices; make mathematical calculations with speed and accuracy; maintain files and records; follow oral and written directions; communicate effectively with others; read, understand, and apply rules and regulations; and use current computer word processing and spreadsheet software programs, web browsers, integrated financial systems and/or other types of records management systems, including student accounting, cashiering and student financial aid. Read and write English at a level appropriate to the position.

Experience:

One year of general clerical experience **OR** any combination of education and experience which provides the required knowledge and abilities.

Draft Classification Standards – Rev. 11/22/10

Accounting Technician Series

<i>Classification Title</i>	<i>Class Codes</i>
<i>Accounting Technician I</i>	1730
<i>Accounting Technician II</i>	1741
<i>Accounting Technician III</i>	1740

OVERVIEW:

Accounting Technicians provide technical support to organizational units responsible for receiving and disbursing university and/or auxiliary funds and recording financial transactions (e.g., accounts payable, accounts receivable, student finance, investments and special projects, trust and general accounting units).

Positions are assigned to classifications in this series on the basis of the degree of complexity, difficulty, and variety of duties performed; amount of independence, originality, and discretionary decision-making authority delegated to the position; and demonstrated level of knowledge of accounting methods, procedures, and practices. All classifications require knowledge and understanding of financial record-keeping methods, procedures, and practices and the ability to use current computer word processing and spreadsheet software programs, web browsers, integrated financial systems and/or other types of records management systems, including student accounting, cashiering and student financial aid. Incumbents may be assigned responsibility for providing training, guidance, and assistance to other employees and participating in the performance evaluation process.

The Accounting Technician Series is distinguished from other series such as clerical, payroll, general administrative support, and purchasing by a primary responsibility for providing technical support to functional units involved in receiving and disbursing university funds and/or its auxiliaries and recording financial transactions.

Accounting Technician I – Work is typically constant and well-defined. Work assignments have well established guidelines and are outlined in specific terms. Assistance is provided handling transactions that are not clearly covered by established university policy.

Accounting Technician II – This is the journey-level classification in the series. Work is more responsible and of greater diversity and complexity than the lower levels. Incumbents work independently and exercise initiative and judgment in making decisions consistent with standard practice and established guidelines.

Accounting Technician III – Incumbents at the advanced journey-level must exercise considerable judgment, initiative, and independence to achieve results. Work assignments may involve subject matter requiring technical expertise. Incumbents usually have a variety of contacts, inside and outside the university.

TYPICAL ACTIVITIES:

The following examples of typical work activities are meant to illustrate the general range of work functions performed by Accounting Technicians; they are not meant to be all inclusive or restrictive. Work assignments may involve other related activities within the scope of each classification.

Accounting Technicians typically perform duties that include some or all of the following: review documents for accuracy, completeness, validity, and adherence to standards; make mathematical calculations; assign transaction codes and prepare documents for processing; post data to journals, registers, and ledgers; compile, verify, reconcile, analyze, and summarize information; prepare invoices, enter data, and prepare billings and past due notices; review computer generated reports and make necessary corrections; maintain records; understand and interpret university policies and regulations for faculty, staff and the general public; review web pages and make recommendations for updates; write or update departmental procedures; perform routine clerical functions as needed, such as sorting mail, data entry, greeting customers, answering phones and providing assistance, filing and using standard office equipment; provide technical assistance with web site applications; and use

current computer word processing and spreadsheet software programs, web browsers, integrated financial systems and/or other types of records management systems, including student accounting, cashiering and student financial aid .

ACCOUNTING TECHNICIAN I

Incumbents in this classification apply a general knowledge of financial record-keeping methods, procedures, and practices to the processing and recording of financial transactions and information. Work assignments are usually well-defined and of a constant nature; however, incumbents may be assigned responsibility for resolving problems. Detailed instruction is initially provided for incumbents new to the position. Once this introductory period is completed, incumbents are responsible for performing work that is accurate and for independently identifying and correcting any errors that may occur.

Incumbents communicate established university policies and procedures to faculty, staff and the general public, referring them to the appropriate staff member when more extensive interpretation is required; receive and disburse monies; match invoices and receiving reports against purchase orders; compile various documents and review for accuracy; make mathematical calculations; prepare claim schedules; create and maintain spreadsheets including entering, revising, sorting, calculating and creating tables; modify, run and export queries; review and recommend updates to web pages; provide input to the modification and documentation of established procedures based on precedent and university policies; maintain files and records; reconcile account balances; and participate in the testing of financial software for upgrades and implementations as related to the position including such activities as testing transaction/data entry and data output.

TYPICAL QUALIFICATIONS:

Knowledge:

General knowledge of financial record-keeping, mathematical and general office methods, procedures, and practices.

Abilities:

Ability to review financial documents for accuracy, completeness, validity, and adherence to standards; compute and post numbers rapidly and accurately; maintain files and records; identify, trace, and correct errors; follow directions; interpret and apply written rules and regulations; establish and maintain effective working relationships with others; exercise tact, courtesy, alertness, and good judgment in responding to others; use current computer word processing and spreadsheet software programs, web browsers, integrated financial systems and/or other types of records management systems, including student accounting, cashiering and student financial aid; and read and write English at a level appropriate to the position.

Experience:

Equivalent to one year of clerical accounting or financial record-keeping experience which has provided the above knowledge and abilities.

Education:

Any combination of education and experience which provides the required knowledge and abilities.

ACCOUNTING TECHNICIAN II

Incumbents in this classification have the training and experience required to independently perform most of the skilled work of the Accounting Technician Series. This is the journey-level of this series. Positions of this classification require a thorough knowledge and understanding of financial record-keeping methods and practices.

The Accounting Technician II performs diverse duties involving a wide range of procedures. Incumbents are required to use initiative and judgment in analyzing information and determining a course of action within the specifications of standard practice and established guidelines. Work is usually performed without direct verification or check.

Incumbents communicate established university policies and procedures to faculty, staff and the general public, obtaining clarification from others when more extensive interpretation is required; review data for accuracy and completeness and make correcting entries; maintain accounting of financial aid records; receive payments and disburse checks; prepare billings and past due notices; place holds, assess late fees, and process cancellations; post information to journals, registers, and ledgers; analyze and record transactions for write-off; assemble and compile data used in the generation of financial reports and/or analysis; balance and reconcile assigned accounts; create and maintain spreadsheets, including entering, revising, sorting, calculating and creating tables; modify, run and export queries; review and recommend updates to web pages; assist with the modification and documentation of established procedures based on precedent and university policies; enter codes and data into the computer and review computer reports for accuracy; and participate in the testing of financial software for upgrades and implementations as related to the position including such activities as testing transaction/data entry and data output.

TYPICAL QUALIFICATIONS:

Knowledge:

Thorough knowledge of financial record-keeping, mathematical and general office methods, procedures, and practices.

Abilities:

In addition to the Accounting Technician I abilities, must be able to apply accounting procedures and practices to the analysis of basic accounting problems; analyze and interpret accounting data; apply problem solving techniques in finding solutions to basic accounting problems; understand and apply applicable rules, regulations, policies, and procedures; use current computer word processing and spreadsheet software programs, web browsers, integrated financial systems and/or other types of records management systems, including student accounting, cashiering and student financial aid; work independently; and make sound decisions and recommendations regarding accounting activities.

Experience:

Equivalent to three years of progressively responsible financial record-keeping experience which has provided the above knowledge and abilities.

Education:

Any equivalent combination of education and experience which provides the required knowledge and abilities.

ACCOUNTING TECHNICIAN III

The Accounting Technician III is the advanced journey-level classification in the series. Positions in this classification require a comprehensive knowledge of financial record-keeping methods, procedures, and practices, and a basic knowledge of Generally Accepted Accounting Principles (GAAP). May lead the work of others by providing technical and/or work direction.

The Accounting Technician III performs a wide variety of duties requiring considerable judgment, initiative, and independence. Incumbents in this classification devise new methods, modify and document established procedures based on precedent and university policies and develop new procedures as necessary; deal with subject matter requiring technical expertise; and resolve difficult and unusual problems. Work assignments usually involve a variety of contacts, inside and outside the university.

The Accounting Technicians III typically performs duties that include some or all of the following: assemble and compile data used in the generation of financial reports and/or analysis; maintain accounting records for funds, programs, or activities involving multiple transactions; prepare reconciliations; update and maintain accounting tables and online functionality; create and maintain more complex spreadsheets including entering, revising, sorting, calculating and creating tables; troubleshoot, modify, run, analyze and export queries; identify, research and work with appropriate personnel to resolve computer application errors; participate in the testing of financial

software for upgrades and implementations as related to the position including such activities as testing transaction/data entry and data output; communicate established university policies and procedures to faculty, staff and the general public, including those that require extensive interpretation; prepare monthly adjusting and year-end closing journal entries; interpret and explain university, auxiliary and funding agency regulations to students, faculty, staff and outside parties; disburse funds after independently determining conformance to university regulations; and compose correspondence of a technical nature regarding financial matters.

TYPICAL QUALIFICATIONS:

Knowledge:

Comprehensive knowledge of financial record-keeping, mathematical and general office methods, procedures, and practices; and basic knowledge of Generally Accepted Accounting Principles (GAAP).

Abilities:

In addition to the Accounting Technician II abilities, must be able to interpret and apply a wide variety of written rules and regulations; maintain accounting records for funds, programs, or activities involving multiple transactions; compile, verify, and reconcile financial data; use current computer word processing and spreadsheet software programs, web browsers, integrated financial systems and/or other types of records management systems, including student accounting, cashiering and student financial aid; investigate and resolve errors and discrepancies; and read and interpret computer-generated reports.

Experience:

Equivalent to four years of progressively responsible financial record-keeping experience which has provided the above knowledge and abilities.

Education:

Any equivalent combination of education and experience which provides the required knowledge and abilities.

Draft Classification Standards – Rev. 11/22/10

Accountant Series

Classification Title	Class Codes
<i>Accountant I</i>	1762
<i>Accountant II</i>	4555
<i>Accountant III – NEW</i>	

OVERVIEW:

The Accountant series encompasses those positions whose primary function is performance of professional accounting work which is analytical, evaluative, innovative and advisory in nature. Accountants apply knowledge of the theories, principles, and practices of the accounting profession, including Generally Accepted Accounting Principles (GAAP), in classifying, examining, and analyzing financial transactions.

Positions are assigned to classifications within the series on the basis of the size, scope, and complexity of accounting activities; independence of action; knowledge and ability requirements; amount of planning, evaluation, and analysis required by the position; and nature of supervision received and/or exercised.

The Accountant Series are distinguished from the Accounting Technician series by work that: (1) is analytical, evaluative, innovative, and advisory in nature; and (2) draws upon and requires knowledge of accounting principles and practices.

Accountant I – The entry level professional accountant position is distinguished from the Accounting Technician series by having primary responsibility for the generation of routine financial reports and statements and/or analysis requiring understanding and interpretation in the application of Generally Accepted Accounting Principles (GAAP) and the variety of work assignments.

Accountant II – The intermediate-level professional accountant position involves the application of accounting principles and practices to the resolution of a variety of accounting functions or problems. Work is performed with greater independence of judgment and action than the lower level.

Accountant III – Incumbents perform advanced professional accounting work involving the application of accounting principles and practices to the resolution of a wide variety of complex accounting problems. Serves as a high-level individual contributor providing expertise and/or provides lead work direction to other professional and/or technical staff.

TYPICAL ACTIVITIES:

The following examples of typical work activities are meant to illustrate the general range of work functions performed by Accountants; they are not meant to be all-inclusive or restrictive. Work assignments may involve other related activities within the scope of each classification.

Accountants typically perform some or all of the following duties: assure the proper recording and documentation of financial transactions and contribute to audit process; prepare, analyze, and interpret financial reports, statements, and records; make financial projections; examine documents for conformance to established policies and procedures and Generally Accepted Accounting Principles (GAAP); identify actual or potential problems and recommend corrective action; compute and estimate the effect of proposed changes on operating programs or accounting operations; document and maintain business processes, standards and procedures; provide initial troubleshooting of accounting system problems and participate in the design and installation of accounting system upgrades and required testing and verification of results; conduct extensive financial data compilation, querying and drilling on large volumes of financial data; and use integrated financial systems and/or other types of management records systems.

ACCOUNTANT I

This is the first level of professional accounting work requiring general knowledge and understanding of accounting principles and practices. Under the direction of an experienced accountant, incumbents are given work assignments that are designed to expand practical experience and develop professional judgment in the application of accounting principles.

Work assignments typically include some or all of the following: examine financial documents for completeness, accuracy, and conformance with established policies and procedures and general accounting standards; reconcile reports and financial data with financial statements on file; correct and reconcile account balances to external data; prepare journal entries; resolve problems associated with incorrect entries, deviations from established procedures, and other inconsistencies with accounting principles; correct and reconcile account balances to external data; prepare routine financial reports and statements; and provide input to the documentation and maintenance of business processes, standards and procedures. Incumbents may be assigned responsibility for providing training, guidance, and assistance to other employees.

TYPICAL QUALIFICATIONS:

Knowledge:

General knowledge of Generally Accepted Accounting Principles (GAAP); office methods and procedures; statistical and mathematical presentation of data; advanced proficiency with current word processing and spreadsheet software programs, query tools and integrated financial systems and/or other types of records management systems.

Abilities:

Ability to interpret and follow instructions and policy guidelines; analyze financial and statistical data and draw sound conclusions; utilize problem solving techniques; and establish and maintain effective working relationships with others.

Experience and Education:

Equivalent to a bachelor's degree with a major in accounting, business administration, finance or a closely related field **OR** a combination of education and experience which provides the required knowledge and abilities.

ACCOUNTANT II

Incumbents in this classification independently perform the full range of professional accounting work which requires a thorough knowledge of Generally Accepted Accounting Principles (GAAP).

Work assignments typically include some or all of the following: ensuring that assigned accounting program activities are carried out in accordance with established policies and procedures and general accounting standards; correct and reconcile account balances to external data; identifying actual or potential problems and recommending corrective or preventative action; developing financial statements and reports; making budget projections; predicting the effects of changes in operating programs; interpreting new and existing federal and state regulations relative to their assigned area of responsibility; providing consultative services to campus administrators in resolving accounting problems; recommend changes to and assist with the documentation and maintenance of business processes, standards and procedures. Incumbents may be assigned responsibility for providing training, guidance and assistance to other employees.

TYPICAL QUALIFICATIONS:

Knowledge:

Thorough knowledge of Generally Accepted Accounting Principles (GAAP); office methods and procedures; statistical and mathematical presentation of data; advanced proficiency with current word processing and spreadsheet software programs, query tools and integrated financial systems and/or other types of records management systems.

Abilities:

In addition to those of the Accountant I, ability to apply accounting principles to the analysis of complex accounting problems; analyze and interpret accounting data; prepare clear, accurate financial statements and reports; utilize problem-solving techniques in finding solutions to complex accounting problems; understand and apply applicable rules, regulations, policies, and principles; make sound decisions and recommendations regarding accounting activities; communicate effectively with others inside and outside the unit, including conveying technical information to non-technical people; and provide technical direction to other employees.

Experience:

Equivalent to two years of progressively responsible professional accounting experience.

Education:

Equivalent to a bachelor's degree with a major in accounting, business administration, finance or a closely related field **OR** a combination of education and experience which provides the required knowledge and abilities.

ACCOUNTANT III

The Accountant III position performs high-level professional accounting work requiring a comprehensive knowledge and understanding of accounting principles and practices and substantial judgment and discretion. Incumbents occupying this classification usually lead the day-to-day activities and review the work of clerical, technical or professional employees engaged in accounting, financial record-keeping or financial reporting work, including participation in the performance evaluation process.

Duties performed by the Accountant III typically include some or all of the following: assure that assigned accounting reporting systems and procedures are in compliance with established administrative policies and procedures and acceptable accounting standards; interpret financial reports and statements and identify problem areas; prepare complex financial statements and reports; analyze account balances and reconcile balances to external data; analyze accounting control procedures and recommend changes or modifications; provide technical advice and consultation to campus administrators; represent the university to external organizations on specific issues.

TYPICAL QUALIFICATIONS:

Knowledge:

Extensive knowledge of Generally Accepted Accounting Principles (GAAP); office methods and procedures; statistical and mathematical presentation of data; advanced proficiency with current word processing and spreadsheet software programs, query tools and integrated financial systems and/or other types of records management systems. General knowledge of governmental accounting and internal control methods and related laws, rules, and regulations.

Abilities:

In addition to those at the Accountant I and II levels, ability to prepare complex financial statements and reports; understand and interpret laws and rules; communicate effectively with others inside and outside the unit, including conveying complex and technical professional accounting information to non-technical people; and provide technical direction to other employees and effectively lead the work of others,

Experience:

Equivalent to five years of professional level accounting experience.

Education:

Equivalent to a bachelor's degree with a major in accounting, business administration, finance or a closely related field **OR** a combination of education and experience which provides the required knowledge and abilities.

Draft Classification Standards – Rev. 11/22/10

Budget Analyst Series

Classification Title	Class Codes
<i>Assistant Budget Analyst</i>	5287
<i>Associate Budget Analyst</i>	5284

OVERVIEW:

Under general supervision, the Budget Analyst Series encompasses those positions whose primary function is to perform the budget analysis work required to administer the California State University budgetary program and provide consultative budget services to campus constituents. The series consists of the Assistant Budget Analyst and the Associate Budget Analyst. The Assistant Budget Analyst often provides assistance to the Associate Budget Analyst by handling assigned phases of the budget analysis work while the Associate Budget Analyst is responsible for the full scope of assigned projects, including managing special studies and developing reports.

Assistant Budget Analyst – Perform less complex budget analysis work required to administer the CSU budgetary program and assist in providing consultative budget service to campus constituents. Incumbents in this classification are assigned to assist and work with Associate Budget Analysts and management.

Associate Budget Analyst – Independently perform more complex budget analysis work required to administer the CSU budgetary program and provide consultation to campus constituents. Incumbents in this classification are assigned the budget analysis work for a campus. The nature of this work is predominantly more complex and responsible and requires greater in-depth analysis than does the work performed by Assistant Budget Analysts

TYPICAL ACTIVITIES:

The following examples of typical work activities are meant to illustrate the general range of work functions performed by Budget Analysts; they are not meant to be all-inclusive or restrictive. Work assignments may involve other related activities within the scope of each classification.

Budget Analysts typically perform some or all of the following duties: review, analyze, and develop recommendations on budgetary and related fiscal affairs of the CSU; analyze budget requests and perform continuous budgetary control of appropriations; provide information and instructions to management and employees of the CSU concerning specific phases of budgets and financial procedures; prepare related reports; and use integrated financial systems and/or other types of records management.

ASSISTANT BUDGET ANALYST

This is the first level of professional budgeting work requiring general knowledge and understanding of budget and financial accounting principles and practices. Under general direction, incumbents are given less complex work assignments that expand the incumbent's practical experience and develop professional judgment in the application of budgeting principles.

Work assignments typically include some or all of the following: survey and investigate budget matters, including collecting information from national databases and other institutions of higher education; consult with and advise responsible officials on fiscal organization, fiscal procedure and related problems; analyze budget requests, including projection and revenue costs, posting of budget data to journals, registers or ledgers, and perform continuous budgetary control of appropriations; draft text materials to summarize, analyze, and justify budget programs; gather data and conduct studies on various problems arising in connection with financial administration; assist higher level budget analysts and management with position control, labor cost distribution and budgetary control functions; provide information and instructions to management and employees of the CSU concerning specific phases of budgets and financial procedures; prepare related reports; provide initial troubleshooting of accounting system problems and participate in the design and installation of accounting system upgrades and required testing and verification of results; conduct extensive financial data compilation, querying

and drilling on large volumes of financial data; and use integrated financial systems and/or other types of records management.

TYPICAL QUALIFICATIONS:

Knowledge and Abilities:

General knowledge of the principles and practices of budgetary and financial accounting. Working knowledge of the principles and practices of public finance, administrative, personnel fiscal management and cash-flow management; research techniques and statistical principles and procedures; advanced proficiency with current word processing and spreadsheet software programs, query tools and integrated financial systems and/or other types of records management systems. Familiarity with the principles of position control and budgetary alignment. Ability to define problem areas, collect data, perform preliminary analyses and make appropriate recommendations; and write clear and concise analytical comments.

Experience:

Two years of progressively responsible professional experience in analyzing data including one year involving duties such as preparation, justification and analysis or the control and administration of a budget or budgetary process.

Education:

Equivalent to a bachelor's degree with a major in accounting, business administration, finance or a closely related field **OR** a combination of education and experience which provides the required knowledge and abilities.

ASSOCIATE BUDGET ANALYST

Incumbents in this classification independently perform the full range of professional budgeting work which requires a thorough knowledge and understanding of budget and financial accounting principles and practices.

Work assignments typically include some or all of the following: independently survey and investigate more complex budget matters, including collecting information from national databases and other institutions of higher education; consult with and advise responsible campus officials on budget requests, including projection and revenue costs, posting of budget data to journals, registers or ledgers and perform continuous budgetary control of appropriations; draft text material to summarize, analyze, and justify budget programs; conduct studies on various problems arising in connection with financial administration; assist management with position control, labor cost distribution and budgetary control functions; provide information and instructions to management and employees of the CSU concerning specific phases of budgets and financial procedures; prepare related reports and necessary correspondence; provide initial troubleshooting of accounting system problems and participate in the design and installation of accounting system upgrades and required testing and verification of results; conduct extensive financial data compilation, querying and drilling on large volumes of financial data; and use integrated financial systems and/or other types of records management. Incumbents may be assigned responsibility for providing training, guidance and assistance to other employees.

TYPICAL QUALIFICATIONS:

Knowledge and Abilities:

Thorough knowledge of the principles and practices of budgetary and financial accounting. General knowledge of the purpose, functions, and fiscal organization of the campus(es); principles of position control and budgetary alignment. Working knowledge of the principles and practices of public finance, administrative personnel, fiscal management and cash-flow management; research techniques and statistical principles and procedures; advanced proficiency with current word processing and spreadsheet software programs, query tools and integrated financial systems and/or other types of records management. Knowledge of or ability to learn quickly the financial structure and financial procedures of the CSU. Ability to analyze and review the budgets and financial practices of the campus(es), speak and write effectively, analyze situations accurately, and develop an effective course of action.

Experience:

Three years of progressively responsible analytical experience including two years performing work involving the preparation, justification, and analysis, or the control and administration of a budget or budgetary program.

Education:

Equivalent to a bachelor's degree with a major in accounting, business administration, finance or a closely related field **OR** a combination of education and experience which provides the required knowledge and abilities.