

INTERNAL CAMPUS GUIDELINES FOR ALLOCATING POSITIONS WITHIN THE ANALYST SERIES

Positions in the Analyst series are classified by applying the MSP/PSS Point Factor System.

Analyst I (7234) & ANALYST I-SUPERVISOR (7245)

Incumbents typically perform administrative analysis under the supervision of higher level administrative staff. Assignments may be more limited than those classified at the Administrative Analyst level; may involve more analytical coordination of administrative and professional processes; and, will typically have lower levels of complexity, applied knowledge, freedom to act, resource management, scope and organizational impact than positions allocated at the Administrative Analyst level. While the functions performed are similar to those described at the Administrative Analyst level, the primary distinction is the degree of independence with which the incumbent performs a wide variety of administrative analysis functions.

ANALYST II (7235) & ANALYST II-SUPERVISOR (7246)

Positions which are allocated to the class of Analyst II typically have assignments involving one or a combination of the following:

1. The performance of responsible and complex administrative analysis with only general supervision. Typically, incumbents analyze existing and proposed administrative organizational structure, policies and procedures; identify details of administrative studies; determine and locate sources for collecting information and data; review, analyze, and summarize reports; prepare directives, regulations, and other instructions for issuance to subordinate administrative units; and provide consultative service in administrative management to departmental administrators. Assignments are usually given on a project basis and incumbents are expected to analyze the problem fully, gather data and information, find and evaluate alternate solutions, and make a final, usually written, recommendation. Professional level knowledge in the appropriate field is required to carry out the work.
2. Independent administrative responsibility for a function such as personnel, accounting, grants management, public information, or curricular support for a department of major project of unit and performance of entry-level professional work in this field. This involves interpreting policies which are unclear or not directly applicable to the work situation and making substantive decisions or recommendations on the application of such policy to specific cases. Incumbents advise management on appropriate courses of action for resolution of case-specific problems in such fields as employee and labor relations, fiscal analysis and administration, accounting or other areas relating to the professional programs of the unit. Incumbents represent the unit in

dealings with the public, other universities and funding sources, and independently negotiate courses of action to satisfactorily resolve mutual problems.

Under option two, positions may be classified at this level when the assignment is to serve as a staff assistant to a University executive (Dean, Vice Chancellor, Chair or high level Manager) *only* if the incumbent is required regularly to make substantive decisions which prevent matters from needing resolution by the executive, provide substantive advise to a wide variety of individuals on matters pertinent to the work of the executive, perform analytical studies requiring written reports, compose correspondence on matters of importance, represent the executive at meetings, and is delegated responsibility to speak authoritatively for the executive and to make commitments.

The distinguishing characteristics of this level are: considerable independence of action, substantive decision making, exercise of judgment and discretion over matters of importance to the professional activities and goals of the unit and the requirements for analytical and writing skills. In some cases, lack of these requirements may be offset by the responsibility for supervision of a large number of employees. The difference between options one and two of this class is that positions allocated under option one require professional level knowledge and perform professional level work but do not have broader administrative or operational level responsibilities. Positions allocated under option two require a lower level of professional knowledge but this is offset by additional administrative, operational, analytical or supervisory responsibilities.

ANALYST III (7236) & ANALYST III-SUPERVISOR (7247)

Incumbents at this level typically operate with greater level of independence than those at the Analyst II level. They typically report to a higher level business manager, but may have total responsibility for a small or stable division within a larger department. An incumbent would be expected to review and interpret complex information and develop solutions relevant to their work unit. This involves an intimate knowledge of the Department of which they are a part, and of University systems in general. They would be expected to use a high degree of discretion and judgment in interpreting policies, procedures, laws, and developing a course of action for presentation to a higher level supervisor before approval for implementation. If appropriate, they would be expected to be responsible for program planning and development for their unit, including developing sources of funding and plans for implementation. Over time, they would be expected to coordinate the continued development of the unit. They would be expected to develop budgets for review by a larger Division or Department administrator, including complex negotiations of budgets with appropriate funding agencies. They would be expected to develop and prepare data reports, annual reports, and periodic budget updates. These would be based on independent development of appropriate data bases and use of data analysis systems to either project long range budget plans, or to accomplish research goals.

If the position is the financial analyst for a large division or department, the incumbent would be expected to assure compliance with complex research, develop guidelines, and develop and review verification protocols for a number of large and complex grants and contracts involving a variety of different procedures to assure compliance with

appropriate policies and applicable laws.

The incumbent may administer the financial portion of a small department or division. They would develop financial prospectuses; oversee appropriate transfers of funds from indirect to direct accounts in compliance with University and Federal rules and regulation. They would be expected to carry out individual fund analyses, develop division budgets, and develop and implement policies and procedures related to the financial welfare of the unit, under the direction of a Chair or MSO.

The distinguishing characteristics of this level are a higher level of independence of action, such as administrative responsibility for a small division, financial accountability for numerous complex research grants and contracts, or financial analysis for a department or large division. Extensive interpretation of available facts and related information is frequently required. The incumbent would have in-depth knowledge of basic concepts, practices, and procedures relevant to the work performed. They would be responsible for the development and implementation of plans for new or existing programs and services for a department or functional area, or for a major sub-division or functional area of a large department.

ANALYST IV (7237) & ANALYST IV-SUPERVISOR (7248)

An incumbent at the Analyst IV level is expected to provide staff assistance to campus officials in studying and developing recommendations which lead to major changes in organization, policies, procedures and practices. They may be expected to develop business plans for a large, autonomous division, and run such a division operationally, although ultimate accountability would rest with the Manager or MSO. Their responsibilities would typically cover a broad range, including development of operational and business plans for the division, which may include cost capture, or plans for maximizing returns and expanding clinical or research operations. They would analyze complex actions, such as volume statistics, expenses, revenue trends, and be responsible for pre and post award administration of multiple grants and contracts. They may be responsible for residency training and fellowship programs. They would be expected to perform in-depth analyses of fiscal affairs of a large division, develop long range budgets and cost accounting methods. They would serve as personnel officer for faculty, fellows, administrative and technical staff. They would have independent responsibility for administering and supervising the organization of division offices, including work flow, space utilization, and facilities planning and renovations.

The incumbent would, with minimal supervision, be expected to negotiate complex contracts with federal agencies, drug companies, or other granting agencies. They would interact with a wide range of departments and individuals within the institution, as well as groups outside.

The distinguishing characteristics at this level would be found in scope or complexity of the duties and responsibilities of the position. The incumbent would demonstrate independence of judgment and decision making for a complex division, or major portion, such as financial management, of a complex department. They would be expected to conduct extensive interpretation of available facts and information, and use a high level of analytical skills to develop and implement plans. They would be expected to

demonstrate advanced knowledge in a specific area, or in-depth knowledge for a broader range of functions, such as administration of a division. They must be able to determine appropriate policies and procedures, and develop strategies for accomplishing the work of the unit with minimal supervision, and within only general guidelines.

ANALYST V (7238) & ANALYST V-SUPERVISOR (7249)

Incumbents at this level are expected to perform and be responsible for the highest level of administrative analysis. This might involve complex financial management for a large department with multiple divisions. Analyses would lead to development and implementation of new policies of major impact to the way a department or large division functions over time.

As administrator of a large, complex and dynamic division, the position would be expected to exhibit significant decentralized authority. The incumbent would be responsible for planning, coordinating, and negotiating with outside agencies, for example, for indirect cost rate regulating. May be responsible for financial modeling to evaluate, make recommendations, and develop sophisticated long range plans for the division. The analyses performed would be the basis for significant management decisions. The incumbent might be responsible for actively marketing for potential contract or grant funds from outside agencies. In this instance, he/she would display considerable entrepreneurial skill.

Other positions at the Analyst V level include unique positions with significant campus-wide impact. They typically act as the major resource to campus departments on issues in their area of expertise. Positions at this level are found in risk management, student affairs, affirmative action, and accounting, among others. These positions provide campus-wide consistency in specific areas. They advise departments on appropriate courses of action.

A third type of position classified at the Analyst V includes positions which are responsible for a significant community-based program. These positions analyze, develop, and implement strategies for community relations, outreach, and support, in addition to being accountable for ongoing administration. They develop liaisons with similar programs on other campuses or communities.

ANALYST VI (0714) & ANALYST VI-SUPERVISOR (0720)

Analysts at this level are expected to provide leadership to a major University Unit or program. This frequently involves responsibility for policy development, and management of resources thorough the direction of others, typically for several different functional areas, each headed by an exempt supervisor with administrative responsibility for subordinate staff. They often are expected to provide extensive interpretation of facts and seek out other relevant information to determine creative and unique solutions to problems. Guidelines to performing this work are given in general terms. Analysts at this level must possess a high degree of freedom to act in the conduct of their work, and to make significant contributions to the University.

Interactions are typically with a wide range of departments and individuals within the University, and with some outside groups.

Positions at this level tend to provide a major consulting resource to the campus. They are typically high level, unique positions responsible for developing consensus among major functions, for example, Medical Center directors, Department Managers, and faculty. They may be responsible for developing pricing strategies for a major portion of campus, implement and coordinate changes. They may be responsible for developing major systems for the campus, for example, hospital accounting or payroll, or patient financial services. They may be responsible for major construction, space and facilities management campus-wide. Another type of position is responsible for providing legal services to a major portion of the campus. These are specialized positions requiring education, expertise, and experience in a specific area, such as law or architecture.

Another type of position at this level is typically responsible for a major function for a school or large department, for example, for overall developing and implementing a school-wide program, including on-going support. For example, development, implementation and oversight of all administrative systems and functions for a school or large department. Might include, in addition to the above mentioned functions, marketing, outreach and liaison for a program of major importance, such as the organ transplant program.

SUPERVISORY POSITIONS are positions designated with two or more career UCSF employees reporting to the individual with responsibility for at least three of the six HR functions.