

## SECTION 1. POSITION INFORMATION

<b>a. Class No./Title:</b> 0108 - Administrative Program Spec	<b>b. Competency Level:</b> 1
<b>c. Effective Date</b> 4/1/2014	<b>d. Position No:</b> H99832
<b>e. Working Title:</b> BAO Administrative Specialist	<b>f. Work Unit:</b> Business Office
<b>g. Agency No.:</b> 58018	<b>h. Agency Name:</b> Oregon Institute of Technology
<b>i. Employee:</b>	<b>Supervisor:</b> Michelle Meyer
<b>j. Work Location:</b> Klamath Falls, Oregon	
<b>k. Position :</b> Full Time Permanent Regular Hours	
<b>l. FLSA:</b> Non-Exempt	<b>Eligible for Overtime:</b> Yes

## SECTION 2. PROGRAMMING INFORMATION

### a. Describe the program in which this job exists. Include program purpose, who is affected and scope. Include relationship to institutional mission.

The business and financial policies are administered through the Business Office with the approval of the Vice President for Finance and Administration. The role of the Business Office includes supporting Oregon Tech compliance with federal and state regulations and policies. The Business Office provides a variety of services to students, faculty, staff and campus departments. Primary functions are accounting and financial reporting; accounts payable; accounts receivable; cashier services; grants receivable; debt management; payroll; property control; federal, state and local tax compliance, and travel.

### b. Describe the purpose of this position and how it functions within this program by completing this statement:

The Administrative Specialist relieves the Director of operational and administrative details and performs diverse, responsible, and complex administrative assistant functions with minimal supervision. The Administrative Specialist exercises initiative and judgment in supervising and managing daily office activities, programs, minor accounting projects and other projects. This position comes into contact with administrators, deans, directors, department chairs, faculty, staff, students and the various publics served by the University and requires strong communication skills and a thorough understanding of University policies, procedures, and operations.

## SECTION 3. DUTIES

### a. Major Duties

20% - Relieve the Director and/or Assistant Director of operational or administrative details by planning and implementing decisions and projects from inception to completion, and making administrative decisions on behalf of

the supervisor when appropriate and within established guidelines or policy, including Oregon Tech policies and procedures.

Reconciliations and other minor accounting projects as assigned by the Director.

40%- Help the department to achieve its mission by coordinating complex business processes associated with campus departments, branch and extension campus locations:

- Organize, coordinate, plan, and conduct departmental events, including training provided to campus departments, by securing space, equipment, food, preparing invitations, announcements, agendas, brochures, packets, purchasing awards, making travel arrangements and reservations
- Assist Accounting Manager with answering student and parent questions regarding student account info.
- Coordinate the establishment, submission and publishing of Special Institution Fees.
- Coordinate requests from outsourced Food Service and Bookstore operators for facility and campus service support.
- Procurement Card Administrator; sets up training, order cards, manage limits.

10%- Serve as the communication hub of the department by:

- Serving as receptionist, answering general questions, directing visitors to appropriate office or person
- Regularly reviewing and maintaining the departmental website and any departmental databases
- Communicating information from the supervisor to others
- Collecting and organizing information requested by the supervisor from others
- Making information available to others by mail, email, telephone, and the web
- Organizing and maintaining materials used when Business Office conducts training for campus groups

10%- Serves as administrative assistant to the Director

- Providing or overseeing reception services, scheduling appointments, meetings
- Making travel arrangements for the Director and other department staff, including making reservations, paying registration fees, preparing travel reimbursement forms
- Preparing and proofreading correspondence, reports, and other documents prepared by the supervisor
- Organizing and maintaining paper and electronic filing systems, initiating recurring administrative processes, coordinating projects, and assisting in the completion of reports by gathering required information and preparing reports
- Maintaining security of equipment, files, and records and archiving records in accordance with office policy and state regulations;

10%- Manage office operations by:

- Obtaining equipment, services, and supplies needed by the department by maintaining an inventory of office supplies, purchasing computers, furniture, office supplies and equipment, determining the appropriate method to pay for goods or services purchased by the department following University policy and procedures, and utilizing the appropriate process.
- Tracking Business Office staff leave requests and maintaining the Business Office calendar of time off
- Assisting with new hire tasks, such as requesting appropriate keys, computer access, necessary equipment
- Managing multiple departmental accounts with active purchasing activities by inputting purchase orders and invoices, reconciling accounts monthly, maintaining running balances of sub-accounts established within the department, and preparing financial reports which are relied on by the supervisor for making financial decisions

5%- Contribute to the overall success of the department by performing all other duties and responsibilities as assigned, maintaining high levels of accuracy, maintaining a professional demeanor and appropriate levels of confidentiality, and providing excellent customer service.

#### **b. Marginal Duties**

5% - Serve as back-up to Cashier and/or with mail as needed.

## SECTION 4. WORKING CONDITIONS

Describe special working conditions, if any, that is a regular part of the job. Include frequency of exposure to these conditions.

The work environment consists of exposure to physical conditions typical of a normal office environment. Most of the job is performed while sitting, although the work may require occasional standing or walking and/or the lifting and carrying of small objects.

## SECTION 5. GUIDELINES

a. List any established guidelines used to perform the job, such as state and federal laws or regulations, policies, manuals or desk procedures.

Ability to interpret and communicate policies and procedures, particularly but not limited to:

- Federal and State Regulations
- Oregon Tech Board of Trustees Fiscal Policy
- Oregon Tech Policies and Procedures

b. How are these guidelines used to perform the job?

Used daily to apply guidelines to appropriate business situations.

## SECTION 6. WORK CONTACTS

With whom outside of co-workers in this work unit must this position regularly come into contact?

Who Contacted	How	Purpose	How Often
Students, campus community	In person, telephone and email	Respond to questions and assist with Business Office	Daily
General Public	In person, telephone and email	Answer questions regarding Business Office functions	Daily
External Auditors	In person, telephone and email	Respond to inquiries regarding practices, procedures and supporting documents	Annually
Internal Auditors	In person, telephone and email	Respond to inquiries regarding practices, procedures and supporting documents.	As Needed
Campus Community	In person, telephone and email	Track the status and flow of documents in various stages of completion.	As Needed

## SECTION 7. JOB-RELATED DECISION MAKING

Describe the kinds of decisions likely to be made by this position. Indicate the affect of these decisions where possible.

Schedule and prioritize position workload

Manage projects as assigned;

Coordinate and allocate student work assignments within the department;

Interpret federal and state regulations, Oregon Tech Board of Trustees policies and Oregon Tech policies

## SECTION 8. REVIEW OF WORK

Who reviews the work of this position? (List classification title and position number.) How? How often? Purpose of the review?

The Director of Business Affairs as needed and annually

## **SECTION 9. ADDITIONAL JOB-RELATED INFORMATION**

### **Any other comments that would add to the understanding of this position:**

The ability to anticipate the needs of the Director or other department staff is preferred. This office environment can be fast paced and often requires the ability to multitask and prioritize competing demands.

Effective verbal and written communication skills are required; effective interpersonal and organizational skills are required. The ability to coordinate with other individuals or departments to achieve desired outcomes is required. The ability to maintain appropriate levels of confidentiality is also required.

A working knowledge of word processing (Word) and spreadsheet (Excel) applications required, with keyboarding skills of at least 50 wpm. Must have a working knowledge of, or the ability to learn and use, database applications, the web content management system, general accounting functions [(e.g. account reconciliations, research of general ledger account(s))]the administrative business system (Banner) or enterprise resource planning system, and other systems or applications that may be used within the University or department.

Must know how to operate and troubleshoot electronic office equipment (copiers, multi-line telephone, 10-key adding machine, fax), computers, and peripherals, maintain complex filing systems and records, and make mathematical calculations.

Ability to work in multiple database systems and to work with multiple charts of accounts and varying procedures between organizations. Information must be handled in a confidential manner.

Remains competent and current by attending professional development courses, software training classes, and/or other educational sessions as directed by the supervisor or required by the University.

Supervisory skills and the ability to train, assign work, and review the work of part time employees and student workers are required.