

Summary			
JOB DESCRIPTION NO: 200386	VERSION: 1	PREVIOUS JD NO:	POSITION CONTROL NO: 200386
DEPARTMENT: POLICY AND RECORDS ADMIN		UNIT CODE: 000102	VC AREA: RSRC MGMT & PLN
INCUMBENT NAME: Scott Sagle	PHONE:	INCUMBENT EMAIL:	WORK LOCATION: Main Campus
PAYROLL TITLE: ANALYST, ADMINISTRATIVE	TITLE CODE: 7243	SALARY GRADE: PSS 5	HEERA: All Others, Confidential
BACKGROUND CHECK REQD? Yes		C.O.I. DISCLOSURE REQD? No	PHYSICAL REQD? No
SUPERVISOR NAME: JOHNSON, PAULA JEANNE	PHONE: 858-534-2552	SUPERVISOR EMAIL: pjohnson@ucsd.edu	SUPERVISOR TITLE: DIRECTOR (FUNCTIONAL AREA)

Overview

WORKING TITLE

Assistant IPA Coordinator (100%)

DEPARTMENT OVERVIEW

Policy & Records Administration (P&RA) provides management and advisory services to the campus for public access and privacy compliance and administrative services for records and information management and chancellor's correspondence communications. P&RA's vision is to be the leader in public records and document management practices and technology in support of the University's mission of teaching, research, patient care, and public service. Routinely the University is faced with new unfunded mandates required by State law, Federal law and Regents policy. P&RA is one of the first areas that must respond to the changing environment without additional funds and or supplements. Our staff is highly cross trained and able to provide multi-tasks in this ever changing environment.

POSITION OVERVIEW

- This position acts as an Assistant Information Practices Act Coordinator to facilitate compliance with governmental requirements under the domain of the California Public Records Act and Information Practices Act. Under the oversight of the Director of Policy & Records Administration, the incumbent independently conducts research and analysis in handling access requests required by law and regulation involving public access and privacy (CPRA, IPA, FOIA, HIPAA, FERPA). The Assistant IPA coordinator responds to requests assigned by the coordinator, analyzing and choosing the appropriate response. The incumbent consults and confers with both internal and external agencies in the scope of responding to requests for public records, including department managers, Campus Counsel, systemwide coordinators and Office of The President.

Working with the IPA Coordinator, the position will provide significant research and analysis of current issues in public access and privacy, recommend new methods of communications, and assist the coordinator with training and outreach programs to serve the campus community.

Serve as a resource regarding policies, procedures, and precedents of Campus Administrative Policy. Manage and develop official campus organization charts and provide support to the campus in developing departmental organization charts. Research issues related to policies and develop appropriate responses. This position will research, analyze and develop projects in coordination with the Campus Policy Coordinator in the management of the Campus Policy Manual and Delegations of Authority.

The Assistant IPA coordinator assists in the development of campus-wide information records management/planning programs and independently serves as an advisor on retention policies and best practices in records information management. The incumbent will analyze current issues and develop and recommend solutions to complex problems involving document management technologies and systems development and design. The Assistant IPA Coordinator will assist the Director and the IPA Coordinator in conducting training classes for campus personnel regarding public records and privacy issues, records management and continuity planning.

As part of the team in Policy & Records Administration, the incumbent assists with the high level support for the Chancellor's office in the areas of Regents Coordination, Council of Chancellor's agendas and meetings and will liaison with local Regents and the Secretary of the Regents in coordinating Regents meetings and campus briefings. In addition, this position will be responsible for University records pertaining to Regental materials, developing and incorporating new methods for disclosure and preserving confidentiality and privacy.

SPECIAL CONDITIONS

This position is confidential under HEERA

EMPLOYEES DIRECTLY SUPERVISED

EMPLOYEES SUPERVISED THROUGH OTHERS

Functions and Tasks

I	FUNCTION NAME Public Records and Privacy	% TIME 45%	ESSENTIAL Yes
	<p>RELATED TASKS</p> <ul style="list-style-type: none"> ■ a. Implement CPRA strategy and perform functional analysis of CPRA guidelines and procedures. Assist in the development of specific policy language or standards projects to ensure conformance with federal and state laws, regulations and statutes. Act as the Assistant California Public Records/Information Practices Act coordinator for the campus. Accept and process requests for public records in accordance with applicable laws. Interpret and apply applicable statutes in the response to the public and the release of University records. ■ b. Research statutory, regulatory, and business requirements and make recommendations to senior management involved with PRA activities. Ensure that campus responses to CPRA requests are managed and reviewed for relevancy, privacy and legal disclosure. ■ c. Evaluate information that must be identified and gathered, working with campus management to facilitate appropriate responses to requests ■ d. Gathers, analyzes and evaluates dissemination of confidential documents concerning labor relations matters such as salary and fringe benefit costing for bargaining purposes, and collective bargaining or grievance matters. ■ e. Disseminate information related to requests to Chancellor, VC's and consult with the Office of the General Counsel, Campus Counsel and campus offices to coordinate appropriate replies. ■ f. Incorporate and disseminate educational materials to campus staff through staff education opportunities including formal training courses, seminars and conferences. Work on projects to provide outreach and guidance. Conduct training courses and consult with departments to provide specialized topics in information practices and privacy requirements. ■ g. Review responses with the IPA Coordinator and maintain official campus records of all records requests and materials distributed. ■ h. Serve on campus committees and workgroups providing consultation to campus committees on all aspects of information practices, public information policy, and privacy. 		
II	FUNCTION NAME Campus Regents Contact Coordination	% TIME 20%	ESSENTIAL Yes
	<p>RELATED TASKS</p> <ul style="list-style-type: none"> ■ a. Under the oversight of the Director, independently coordinate with campus departments, systemwide offices, and the Chancellor's office for all agenda submissions from the campus. Provide training and advise to campus departments in the preparation of materials and verify appropriateness of item utilizing UC policies and guidelines. 		

- b. Coordinate and disseminate information to key campus administrators and the Office of the President to ensure items are processed for Regents' meetings. Communicate upcoming deadlines dates; maintain listings of future planned Regents' items, follow up and track development and progress of future items and inform Director and Vice Chancellors of status.
- c. Responsible for the preparation and summary of Regent's meeting books, including assignment of action and dissemination of information of interest to the campus. Responsible for the timely delivery of materials to the Chancellor and Vice Chancellors in preparation for the Regent's meetings. Ensure follow up to actions taken by the Regents are disseminated to the Chancellor and Vice Chancellors including approvals of campus regents' items and actions as appropriate.
- d. Coordinate and organize all aspects and arrange special accommodations required for onsite campus Regent's meetings or teleconferences. Provide local Regents with necessary information and insure that facilities and technical details are coordinated and prepared. Ensure that the Secretary of the Regents is notified of attendance at local Regents meetings of all campus staff to ensure proper clearance of these individuals. Post meeting information as required by the Secretary of The Regents and act as sergeant at arms when required.
- e. Provide materials by request on all matters related to Regents' Agenda Items as requested. Ensure appropriate clearances and related paperwork for release of closed session material.
- f. Coordinate the preparation and review of campus Presidential Items with campus department, Systemwide offices, and the Chancellor. Verify appropriateness of item. Establish procedures for handling Presidential Items.
- g. Prepare and disseminate meeting materials for the Council of Chancellors meeting including preparing related agendas.

III	FUNCTION NAME Records and Information Management	% TIME 25%	ESSENTIAL Yes
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- RELATED TASKS
- a. The Assistant IPA coordinator will develop and implement projects of moderate analytical scope in fulfilment of campus-wide information records management/planning programs. Maintain and enhance knowledge of records management best practices for lifecycle management of University records in accordance with UC policy, state and federal regulations and standards (Dept of Justice, Dept of Defense, ISO standards and National Archive Records Administration best practices).
 - b. Provide consultation and serves as an advisor on retention policies and best practices in records information management.
 - c. The incumbent will analyze current issues and develop and recommend solutions to complex problems involving document management technologies and systems development and design. Act as a campus resource consulting on imaging and scanning technologies.
 - d. Provide for demonstrations of software and equipment to departments, and assist with requirements planning for new deployments at the department level.
 - d. The Assistant IPA Coordinator will assist the Director and the IPA Coordinator in conducting training classes for campus personnel regarding public records and privacy issues, records management and continuity planning.

IV	FUNCTION NAME Campus Organization Charts	% TIME 10%	ESSENTIAL Yes
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- RELATED TASKS
- a. Independently function as the central point of contact for the campus in the production and distribution of organization charts, e.g., Chancellor and Vice Chancellors. Ensure up to date presentation of campus organization charts, analyzing issues, creating and implementing solutions.
 - b. Organization charts are used in the performance of Chancellor's compensation requests to the President and Regents. Independently maintain and update campus administrative charts and ensure accessibility to the campus community. Coordinate publication and design and drawing of organization charts, utilizing appropriate computer software.
 - c. Research and make recommendations related to future program acquisitions and software in support of the web-user interface.
 - d. Initiate, prepare initial drafts, and coordinate review and approval of administrative organization charts with senior management offices.

- e. Provide consultation to users in updating and presenting senior management charts and coordinate with the Policy Coordinator for inclusion in campus policy manuals.
- f. Independently design, develop and disseminate information related to official organization charts, including preparing briefing materials for accreditation purposes.

Knowledge, Skills and Abilities

	DESCRIPTION	IMPORTANCE
A	Excellent business and administrative analysis experience, including strong organizational skills. Bachelor's degree or equivalent combination of education and work experience in business, public administration or related field preferred.	Required
B	Excellent interpersonal skills with the ability to interact in a positive manner with diverse clientele, including, prominent social and business figures, elected officials, and campus administrators, faculty, staff and students using a high degree of tact, diplomacy and discretion, with emphasis on flexibility and discretion.	Required
C	Demonstrated ability to maintain complete confidentiality. Demonstrated skills to develop methodologies to identify and protect information privacy as defined by law and university policy. General knowledge of federal and California state privacy laws and requirements. Extensive knowledge of California Information Practices Act.	Required
D	Knowledge of records information management principles and standards. Ability to recommend formats for records collections, including electronic filing systems, optical imaging, microfilm and various media.	Required
E	Extensive knowledge and skill in creating executive level report writing, correspondence communications, including proper formats, clarity, grammar and style in preparing a broad variety of written materials. Able to analyze, synthesize and extrapolate information and convey it for optimum clarity. Ability to research special studies/projects involving complex data analysis sets compile data and reports.	Required
F	Demonstrated ability to assess problems and suggest solutions, and to implement innovative changes and improve systems.	Required
G	Demonstrated ability to develop, implement and disseminate training materials incorporating established policy guidelines. Strong oral and written communication skills. Ability to write and speak clearly and present detailed information and analysis.	Required
H	Exceptional organizational skills in order to prioritize independent function and workload, meet deadlines, and work in an environment of heavy pressures and changing priorities.	Required
I	Demonstrated skills and techniques to recognize problem issues and situations and apply resourcefulness in finding appropriate solutions to implement problem solving to mitigate potential negative effects and follow-through to ensure effective resolution. Ability to provide leadership in addressing complex and sensitive problems/matters.	Required
J	Knowledge of business and legal terminology and application of terminology in business correspondence. Ability to create complex correspondence and contract language and review and edit documents including contractual conditions.	Preferred
K	Intermediate knowledge and demonstrated skills with MS office suite, including Visio and Project Manager. Demonstrated skill in using database or access oriented query tools and applications. e.g. Documentum or Content Manager	Acquired
L	Ability to coordinate, submit, publish and initiate various documents and procedures associated with the Regental, Presidential and Chancellor approval and understanding of the timeliness and sequencing of such work.	Acquired
M	Complete familiarity with systemwide and campus policies including: 1) Policy and Procedure Manual 2) Academic Personnel Manual 3) Systemwide Business and Finance Bulletins 4) Accounting Manual 5) Notices (green sheets).	Acquired

Environment

PHYSICAL ACTIVITIES

Standing: Occasionally	Crawling: Never	Bending: Occasionally	Walking: Occasionally
Climbing: Occasionally	Kneeling: Never	Sitting: Constantly	Reaching: Occasionally
Balancing: Never	Seeing: Constantly	Keying: Frequently	Feeling: Frequently
Talking: Frequently	Hearing: Constantly	Handling: Frequently	Lifting 0-20 lb: Occasionally
Lifting 20-50 lb: Occasionally	Lifting 50+ lb: Occasionally	Carrying 0-20 lb: Occasionally	Carrying 20-50 lb: Occasionally
Carrying 50+ lb: Never	Pushing 0-20 lb: Occasionally	Pushing 20-50 lb: Occasionally	Pushing 50+ lb: Never

MENTAL ACTIVITIES

Reading: Frequently	Writing: Frequently	Calculating: Occasionally
Communicating Orally: Constantly	Reasoning: Constantly	Analyzing: Constantly

ENVIRONMENTAL CONDITIONS		
Confined Areas: Occasionally	Exposed to Weather: Never	Noise Exposure: Never
Vibrations: Never	Extreme Temperatures: Never	Potential Hazards: Never
Fumes/Odors/Mists/Dusts: Occasionally	Potential Allergens: Occasionally	Work Inside: Constantly
Work Outside: Never	Other:	

Signatures for Printed Copy

A. SAFETY

Based on Labor Code Section 6401.7 it is expected that all employees know and practice all appropriate safety methods and procedures.

B. PAYMENT OF OVERTIME

If this position is designated as eligible for premium overtime and is not subject to any collective bargaining agreement, overtime may be paid by either compensatory time off or cash at the option of the department, unless agreement to this effect is not reached, in which case pay shall be provided.

EMPLOYEE'S SIGNATURE

I certify that the above description is correct, complete and describes my job as I understand it.
I have read both the Safety and Overtime Payment statements.

Employee's Signature: _____ Date: _____

SUPERVISOR'S / DEPARTMENT HEAD'S SIGNATURES

I have reviewed the job description and the above statements and certify to their accuracy.

Supervisor's Signature: _____ Date: _____

Dept. Head's Signature: _____ Date: _____

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