

UCSF ANALYST SERIES JOB EVALUATION MATRIX

FACTORS	Analyst 1	Analyst 2	Analyst 3	Analyst 4	Analyst 5	Analyst 6
Scope						
Nature of work	Incumbent is assigned independent responsibility for analysis of limited variety and complexity, or performs varied analyses under direct supervision and following established policies and procedures	Incumbent is assigned complex analytical duties typically on a project basis. Independently performs a wide variety of analysis. Fully analyzes problem to make a final recommendation	Incumbent is assigned complex analysis that requires generalized knowledge of policies and procedure in more than one functional area or substantive knowledge in a specialized field.	Incumbent is assigned a broad spectrum of complex analytical duties that leads to new approaches and/or methodologies that support the final recommendation. For "generalist" positions, there should be responsibility for multiple areas requiring the appropriate knowledge of a variety of professional fields.	Incumbent is assigned a broad spectrum of complex analytical duties that leads to new and/or not yet tested recommendations.	Incumbent is assigned the highest level of analytical duties that involve in-depth knowledge and understanding of numerous variables and interrelationships that leads to new and/or not yet tested recommendations.
Impact of work	Work impacts typically immediate work area.	Work impacts department and/or immediate work area.	Work impacts department by effecting changes to operations/processes/procedures within the broad interpretations of University policy.	Work impacts organizational unit and/or large division with subordinate departments. Typically reports to a position allocated to the MSP program	Work impacts broad organizational unit and/or campus	Same

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Consequence of error/Criticality of decisions	Oversights in work result in internal delays but do not typically have a major impact on the department and/or immediate work area.	Oversights in work or achieving only partial results cause moderate expenditures and delays.	Oversights in work or achieving only partial results cause critical expenditures and delays.	Oversights in work or achieving incomplete results cause serious ramifications for the organizational unit and/or large division with subordinate departments.	Oversights in work or achieving incomplete results cause serious ramifications for the organizational unit and/or campus.	Same
Organizational Latitude						
Independence	Works under supervision.	Works under general supervision.	Works under general supervision.	Works under general direction.	Works under general direction.	Works under minimal direction.
Accountability and decision making	Work is reviewed for accuracy and completeness and includes self-regulatory processes. Decisions are limited to specific, task-related activities.	Work is reviewed for accuracy and completeness. Decisions contribute to the completion of projects and goals.	Work is reviewed in terms of specific objectives. Decisions help shape the development and direction of organizational objectives.	Work is reviewed in terms of meeting objectives. Decisions influence the objectives and overall goals of the organization.	Final results of work are reviewed in terms of meeting unit objectives. Decisions have long-lasting fiscal and operational ramifications for the overall unit and/or campus.	Same
Collaboration	Work is primarily with existing, stable processes and procedures.	Works with ongoing functions or processes. Provides input to unique or first-time programs.	Work contributes significantly to the development of new programs, policies and procedures.	Recommends and implements new/unique programs, policies, and/or procedures.	Develops conceptual framework for implementation of new/unique programs. May resolve negative impact (if any) to unit.	Collaborates with senior management to carry out high-level objectives that extend throughout and/or beyond the organization

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Scope of judgment	Work typically involves making decisions in areas where policies/guidelines are established.	Work typically involves making decisions in areas where policies/guides are not directly applicable.	Work typically involves extensive interpretation of facts and related information. Interpretive thinking is required to find solutions.	Work typically involves making decisions where the application of policy in non-standard situations result in recommendations that establish new precedents.	Work typically involves making decisions where policy is not applicable and the resulting recommendations establish new precedents.	Same
Knowledge						
Experience and training/type of knowledge applied	Requires knowledge of basic analytical principles and concepts.	Requires knowledge within a specific discipline and the ability to apply established practices and concepts.	Requires in-depth knowledge of basic concepts, practices and procedures within the applicable discipline.	Requires complete understanding and knowledge of the application of principles, practices, and concepts of a professional field. May be considered a subject matter expert in area of work for the organizational unit or campus.	Demonstrates thorough knowledge of principles, practices, and concepts within a professional field. Considered to be subject matter expert in one or more specific areas of work.	Provides new direction demonstrating extensive related experience and/or specialized training. Considered an expert in a broad area of work.

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Analysis and problem solving						
Data gathering	Determines and locates sources for collecting information.	Determines and locates sources for collecting information where considerable data gathering is required from distinct sources.	Determines and locates sources for collecting information where considerable data gathering is required from distinct sources.	Determines and locates sources for collecting information where considerable data gathering is required from distinct sources.	Determines and locates unique or specialized sources for collecting information which require thorough and in-depth understanding of the quantitative and qualitative aspects of the analysis required.	Same
Analysis	Performs initial analysis to identify relevant concerns, factors, patterns, tendencies, and relationships of data.	Performs operational level analysis to identify relevant concerns, factors, patterns, tendencies, and relationships of data. Employs current methodology utilizing existing policies and practices.	Performs in-depth analysis and contributes ideas to the development of unique analytical approaches.	Performs in-depth analysis. Develops new approaches when current methodology is inadequate.	Performs complex analysis involving multiple variables across a broad spectrum. Develops problem-solving methodologies or strategies and evaluates criteria.	Performs complex analysis. Develops advanced quantitative and qualitative methodologies or strategies where standard approaches are not applicable.

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Formulation of conclusions	Recommends initial solutions that typically receive additional scrutiny and review.	Recommends solutions to problems of moderate scope and complexity. Solutions require innovation and creativity, and may differ from established norms.	Recommends solutions to problems of substantial complexity. Solutions routinely require deviation from established practice and precedent due to non-routine circumstances.	Recommends solutions to complex problems. Solutions often require "first-time" applications and practices. Formulates logical and objective conclusions, recognizes alternatives, and develops plans to meet objectives.	Recommends innovative solutions to complex problems. Establishes precedents.	Recommends innovative solutions to problems impacting long-range objectives of the organizational unit and/or campus. Develops solutions based on untested, high level knowledge where few, if any, precedents have been set.
Communication						
Nature, purpose and level of contacts	Contacts are on routine matters both within and outside of the organizational unit.	Frequent internal and external contacts throughout the organizational unit on specific projects or subjects.	Serves as primary contact for some areas of inquiry and resource for triage of issues outside of assigned functional area.	Serves as primary contact for area of work. Requires internal and external coordination throughout organizational unit.	Consults with all levels of management, both internal and external to organizational unit, on various projects or subjects.	Regularly consults with all levels of management, both internal and external to organizational unit, on various projects or subjects.

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Project/program management	Assists with project development. Works with ongoing functions or processes.	Works as part of a team or independently to carry project from conception to completion. Works with ongoing functions or processes. Provides input to unique or first-time programs.	Works as part of a team or independently to administer complex existing projects/programs and provide recommendations for enhancements/improvements.	Recommends and implements new/unique programs, policies, and/or procedures.	Develops conceptual framework for implementation of new/unique programs. May resolve negative impact (if any) to unit.	Same
FLSA Exemption Status	Non-exempt	Non-exempt	Exempt	Exempt	Exempt	Exempt
Benchmark education and experience	0-1 years and BA/BS or equivalent combination of education and experience.	2-3 years and BA/BS or equivalent combination of education and experience.	3-4 years and BA/BS or equivalent combination of education and experience.	4-5 years and BA/BS or equivalent combination of education and experience.	5-7 years and BA/BS or equivalent combination of education and experience.	7-9 years and BA/BS or equivalent combination of education and experience. 3-5 years with MA/MS or equivalent combination.