



**YOUR EFFORTS WILL MAKE FI\$Cal A SUCCESS
DUTY STATEMENT**

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| CLASSIFICATION TITLE Staff Services Analyst | DIVISION NAME Executive Division |
| WORKING TITLE Executive Management Support Analyst | POSITION NUMBER 333-150-5157-701 |
| EMPLOYEE NAME Vacant | EFFECTIVE DATE TBD |

You are a valued member of the Department of FISCAL. You are expected to work cooperatively with team members and others to provide the highest level of service possible. Your creativity and productivity is encouraged. Your efforts to treat others fairly, honestly and with respect are important to everyone who works with you.

GENERAL STATEMENT

Under the supervision of the Director of the Department of FISCAL (FI\$Cal), the incumbent will serve as the Executive Management Support Analyst for the Executive Team. Responsibilities encompass a wide range of administrative, research, correspondence and organizational tasks crucial to the efficient operation of the department.

SUPERVISION RECEIVED

Reports directly to the Director of FI\$Cal.

SUPERVISION EXERCISED

None.

ESSENTIAL FUNCTIONS

The incumbent must be able to perform the essential functions with or without reasonable accommodation. Specific duties include, but are not limited to, the following:

| <u>% OF TIME</u> | <u>ESSENTIAL FUNCTIONS</u> |
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| 35% | <p>Written Correspondence & Reporting</p> <ul style="list-style-type: none"> Prepare, edit and/or format confidential and sensitive correspondence on department matters for the Executive Division in order to respond to various entities such as the Department of Human Resources (CalHR), Department of Finance (DOF), State Controller's Office (SCO), State Treasurer's Office (STO), California Department of Technology (CDT), Department of General Services (DGS), other State agencies, unions, and the general public. |

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| | <ul style="list-style-type: none"> • Review and make recommendations for appropriate action on all incoming correspondence and projects for conformance to departmental policies and procedures. • Analyze a variety of critical/sensitive documents, reports, proposals, briefings and other governing documents (i.e., State Administrative Manual (SAM), Government Code, Executive Memos, etc.) to ensure consistency and that objectives are within the scope of the Department of FISCal. • Gather information from Deputy Directors or their designee in order to prepare and distribute reports. • Provide clerical support to the Division by copying and distributing documents, and preparing documentation from hand written notes. • Review materials submitted by staff for accuracy, format, content and grammar; ensure all supporting information is included |
| <p style="text-align: center;">25%</p> | <p>Research</p> <ul style="list-style-type: none"> • Research, prepare and/or review confidential information to assist the Executive Division on sensitive issues. • Research and/or resolve reporting or scheduling problems and coordinate communication with executives at other departments and committees. • Consult with staff and recommend solutions to the Executive Team regarding research findings, organizational improvement initiatives and related issues concerning departmental effectiveness and goal attainment. |
| <p style="text-align: center;">15%</p> | <p>Administrative Detail</p> <ul style="list-style-type: none"> • Assists the Executive Division staff with coordinating conferences, training, meetings, and travel. • Develop and maintain lists of FI\$Cal Advisory Committee members, designees, and contacts in each partner agency, Legislative staffers, California State Auditor (CSA) and the Legislative Analyst Office (LAO). • Maintain telephone directory, Executive Division roster and organization chart, consultant roster, and Executive Division training plans. • Perform initial intake of incoming mail, invoices, applications, Deliverable Expectation Documents, internal billing documents, training requests, and other documents and coordinate the approval routing. • Create requisitions for Executive Division purchases and staff training requests, track their status, and escalate when necessary. • Act as first point of contact and internal consultant between the Deputy Directors, Chief Deputy Director, partner staff, business partners, and the Executive Team in various matters related to the Department. |

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| | <ul style="list-style-type: none"> • Extract and review data from various sources for assignments and independently monitor the progress, completion, and implementation of assignments to ensure deadlines are met. • Review, analyze, create and maintain confidential and administrative files and logs as appropriate. • Independently act upon inquiries and/or requests for assistance from staff members of FI\$Cal's divisions to provide the appropriate response. Escalate issues as needed and provide visibility as appropriate, to the leadership team. • Review telephone inquiries and meeting requests for redirection, and/or respond to incoming telephone calls that are of a complexity/sensitivity nature for Executive Office. |
| 10% | <p>Meeting Preparation & Organization</p> <ul style="list-style-type: none"> • Coordinate daily/weekly/monthly meetings for the Executive Division (i.e., location/date/time, etc.). • Draft memorandums and prepare meeting notes/minutes, reports, and agendas for the Executive Division. • Gather background materials and coordinate audio/visual and other materials necessary to conduct meetings for the Executive Division. • Prepare presentation materials such as Power Point presentations, charts, graphs, and etc., for use by the Executive Division at meetings, conferences, and briefings. • Attend Managers' meetings, FI\$Cal Advisory Committee meetings, and statewide governance meetings as a representative of the Executive Division. |
| 10% | <p>SPECIAL PROJECTS</p> <ul style="list-style-type: none"> • Research and investigate confidential and sensitive issues, evaluate data collected, and identify potential problems while completing special projects and studies. • Provide mitigation strategies or alternatives for resolution when problems are discovered in the course of special projects and prepare recommendations based on direction from the Executive Division. |
| % OF TIME | <u>MARGINAL FUNCTIONS</u> |
| 5% | <ul style="list-style-type: none"> • Perform other related duties as required to fulfill FI\$Cal's mission, goals and objectives. Additional duties may include, but are not limited to, assisting where needed within the team/unit, which may include special assignments. |

KNOWLEDGE AND ABILITIES

Knowledge of: Principles, practices, and trends of public and business administration, management, and supportive staff services such as budgeting, personnel, and management analysis; and governmental functions and organization.

Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental and managerial problems; develop and evaluate alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties on a wide variety of subject-matter areas; and gain and maintain the confidence and cooperation of those contacted during the course of work.

SPECIAL REQUIREMENTS

The incumbent will use tact and interpersonal skills to develop constructive and cooperative, working relationships with others, e.g., stakeholders, customers, management, peers, etc., to facilitate communication to improve the work environment and increase productivity. **Fingerprinting and background check are required.**

WORKING CONDITIONS

The incumbent may need to be on-site to carry out their duties. This position requires the ability to work under pressure to meet deadlines and may require excess hours to be worked. The incumbent should be available to travel as needed and is expected to perform functions and duties under the guidance of the Department of FI\$Cal's core values. The incumbent provides back-up, as necessary, to ensure continuity of departmental activities.

This position requires prolonged sitting in an office-setting environment with the use of a telephone and personal computer. This position requires daily use of a copier, telephone, computer and general office equipment, as needed. This position may require the use of a hand-cart to transport documents and/or equipment over 20 pounds (i.e., laptop, computer, projector, reference manuals, solicitation documents, etc.). The incumbent must demonstrate a commitment to maintain a working environment free from discrimination and sexual harassment. The incumbent must maintain regular, consistent, predictable attendance, maintain good working habits and adhere to all policies and procedures.

SIGNATURES

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the assigned HR analyst.)

Employee Signature _____ Date _____

I have discussed the duties of this position with and have provided a copy of this duty statement to the employee named above.

Hiring Manager Signature _____ Date _____

H/R Analyst TB

Date Reviewed/Revised: 02/09/2024