CALIFORNIA COASTAL COMMISSION
ASSOCIATE BUDGET ANALYST
DUTY STATEMENT

EMPLOYEE NAME:

WORKING TITLE: Budget Analyst

WORK UNIT/DIVISION: Fiscal & Business Services

LOCATION: San Francisco

DATE OF APPOINTMENT:

CBID: R01

TENURE/TIMEBASE: Permanent, Full-time

POSITION SUMMARY

The Budget Analyst serves as a member of the administrative support team and performs complex, analytical work related to the entire Coastal Commission’s annual budget including preparation and development, expenditure tracking, and forecasting for the Coastal Commission in the Fiscal and Business Services section of the Coastal Commission, and in coordination with other administrative units, program staff, and Federal/State/local entities.

In all aspects of the performance of these duties, the Budget Analyst will:

- Establish and maintain effective working relationships
- Provide quality customer service in a timely manner
- Maintain regular and predictable attendance and/or communicate availability during working hours
- Be accurate and timely on work products
- Follow all laws, policies, regulations, and procedures pertaining to the Commission
- Inform management of any key issues and/or problems
- Demonstrate strong analytical, organizational, and communication skills
- Be computer proficient
- Work co-operatively with others under pressure
• Establish priorities, use good judgement, and take effective course of action
• Take initiative to review and research rules and regulations
• Keep accurate files, notes, and workpapers

KEY RESULT AREAS:

• Budget Tracking and Forecasting
• Budget Preparation and Development
• Asset Management
• Other Duties

CUSTOMER RELATIONSHIPS:

The Budget Analyst ensures that the Commission’s budget is prepared, tracked, and reconciled accurately and timely. The Budget Analyst needs to understand the intricacies of the Commission to effectively function within the position.

ESSENTIAL FUNCTIONS

50% - Budget Tracking and Forecasting

• Analyze large data sets from FI$Cal pertaining to expenditures and use the data to track the current fiscal year and historical spending.
• Work closely with the Chief of Fiscal & Business Services to develop and revise spending projections.
• Participate in weekly budget meetings and make recommendations for budget adjustments to ensure fiscal solvency.
• Collaborate with key program heads to develop and update each unit’s annual projected expenditure sheet.
• Assist project managers with developing reimbursement contract and special fund annual billing estimates.
• Complete monthly and quarterly reporting information for special funds.

35% - Budget Preparation and Development

• Act as the primary budget analyst for the Commission.
• Gather data to prepare complex calculations and justifications for the Commission’s response to budget drills from Department of Finance’s Budget Letters, Executive Orders, and other correspondence using Microsoft Word, Excel, FI$Cal (Hyperion and PeopleSoft), and other resources.
• Calculate the Commission’s indirect cost rate annually.
• Work closely with the Chief of Fiscal & Business Services to ensure accuracy and timely completion of budget schedules and other budget drills.
• Coordinate responses from program managers, reviewing fiscal integrity and consistency with approved budgets and accepted fiscal costing methods.
• Assist Chief of Fiscal & Business Services and Chief Deputy Director with preparing and developing budget change proposals to conform to state policies and program objectives including reviewing and editing narrative descriptions and providing fiscal detail and analysis.
• Prepare and submit baseline budget adjustments, budget revisions, technical adjustments, budget change proposals, and other adjustments in FI$Cal (Hyperion) and closely track development of the budget galley.

5% - Asset Management

• Enter and track assets in the FI$Cal asset management module.
• Reconcile and submit the annual fixed asset report.
• Assist with inventorizing of equipment and proper disposal of surplus equipment.

5% - Justice, Equity, Diversity and Inclusion

• Participates in tasks, trainings, outreach and other activities that support implementation of the agency’s Justice, Equity, Diversity and Inclusion (JEDI) plan, which aims to create an inclusive workplace that allows staff from diverse backgrounds to thrive and improves agency outreach and public engagement. For example, this may include attending quarterly JEDI calls, sitting on interview panels, contributing to or attending staff trainings on JEDI issues such as on implicit bias, presenting at outreach events at locations with greater diversity, and providing input on hiring practices.

5% Other Duties

• Serve as back-up for other Fiscal & Business Services personnel.
• Assist with special projects and other duties as assigned.
KNOWLEDGE, ABILITIES, SPECIAL PERSONAL REQUIREMENTS & ATTRIBUTES

- Exemplary interpersonal, organizational and analytical skills. Needs to possess the skill and training to interact with a diverse group of people. Must be able to communicate with all levels in the organization.
- Working knowledge of the Commission’s and State’s budget policies, procedures, and manuals.
- Must regularly research and review policy and regulations to ensure current rules are in place.
- Must demonstrate and maintain a high regard for confidential and sensitive information.
- Must inform management of any key issues and/or problems.
- Self-motivated, self-directed, and self-managed.
- Working knowledge of personal computer and software packages such as Microsoft Office products.
- Ability to work under tight timeframes and effectively manage multiple priorities.
- Ability to travel to Sacramento and to other Coastal Commission Offices.

I certify that this duty statement represents an accurate description of the essential functions of this position.

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JESSICA CHAN
STAFF SERVICES MANAGER III
FISCAL & BUSINESS SERVICES

DATE

I have read this duty statement and agree that it represents the duties I am assigned.

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ASSOCIATE BUDGET ANALYST
FISCAL & BUSINESS SERVICES

DATE