

# California State Auditor

## Duty Statement



<b>Classification - Working Title:</b>	Analyst IV – Budget Officer	
<b>Position Number:</b>	339-100-5403-900	<b>Division:</b> Administration – Fiscal and Business Services
<b>CBID:</b>	E98	<b>Designated Conflict of Interest Position:</b> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/>
<b>Employee Name:</b>		
<p><b>Position Description/Duties:</b> Under general direction of the Fiscal and Business Services Manager (Manager II), the Analyst IV (Budget Officer) functions as the California State Auditor's (office) senior budget expert and independently performs the most complex and sensitive fiscal and budgetary duties. The Budget Officer provides strategic oversight of the office's entire budget development process, including preparation, analysis, and maintenance of program budgets. Additionally, the Budget Officer exercises a high degree of initiative and judgment in forecasting expenditures, analyzing cash flow to ensure operational continuity, and developing long-range financial strategies. The Budget Officer serves as a subject matter expert on statewide fiscal policies, FI\$Cal system operations, and budgetary compliance requirements. The Budget Officer conducts complex fiscal analyses, interprets legislation and budget control language, and provides recommendations to support executive decision-making. The Budget Officer uses advanced analytical skills and has the ability to synthesize large volumes of financial data into actionable insights.</p>		
<b>Job Functions - Essential (E) / Marginal (M) Functions:</b>		
45% E	<p><b>Budget Development and Administration</b></p> <ul style="list-style-type: none"> <li>• Prepares, develops, and monitors the office's budget.</li> <li>• Coordinates and reviews all budget schedules, justification materials, and financial data for accuracy, timeliness, and compliance.</li> <li>• Analyzes monthly year-to-date expenditures against historical data to identify trends for budget preparation.</li> <li>• Develops and applies program budget policies, standards, and procedures to ensure consistency and fiscal integrity.</li> <li>• Analyzes, prepares, and reconciles financial reports for budgeted appropriations.</li> <li>• Prepares budget to actual analysis and monitors cash balances.</li> <li>• Analyzes Department of Finance Letters and prepares Budget Change Proposals (BCPs), Budget Revisions, and detailed budget reports.</li> <li>• Validates, approves, and tracks funding for position allocation, procurements and services.</li> <li>• Uses FI\$Cal and Hyperion to upload, validate, and maintain budget data during budget development and drills.</li> <li>• Serves as the subject matter expert during monthly budget meetings with Executive Office and presents budget forecasts, trends and expenses.</li> </ul>	
35% E	<p><b>Fiscal Analysis and Planning</b></p> <ul style="list-style-type: none"> <li>• Conducts expenditure projections, long-range fiscal planning, and special analyses on key fiscal issues.</li> <li>• Prepares and reviews baseline budget adjustments, budget galleys, supplemental schedules, and budget drills.</li> <li>• Monitors program budgets and spending allocations, including monthly encumbrances for Accounting and Business Services.</li> <li>• Coordinates with Accounting and HR to verify fiscal and position data for officewide budget build.</li> <li>• Develops and maintains spreadsheets to track encumbrances and expenditures for contracts and purchase orders in FI\$Cal, ensuring compliance with budget thresholds.</li> </ul>	

	<ul style="list-style-type: none"> <li>• Recommends release of remaining encumbrance amounts back to the fund.</li> <li>• Forecasts and revises expenditure projections based on actual spending.</li> <li>• Assists with Statewide Cost Allocation Plan (SWCAP) data and provides annual data to the Department of Finance.</li> <li>• Meets with program divisions monthly to review budgets, provides spending trend analyses, and communicates remaining allocations to support informed decision-making.</li> <li>• Represents the office in high-level budget meetings and serves as the expert consultant on fiscal strategy and risk mitigation.</li> </ul>
20% E	<b>Current Year Budget Execution</b> <ul style="list-style-type: none"> <li>• Analyzes the Fund Condition Statement to ensure compliance with fund usage.</li> <li>• Develops budgetary and fiscal documents, presentations, and status reports for senior management.</li> <li>• Identifies and corrects resource anomalies in coordination with program staff.</li> <li>• Utilizes FI\$Cal and Hyperion to analyze financial reports and budget availability.</li> <li>• Researches and analyzes budget appropriations for fiscal year-end close; compiles and reconciles year-end financial data, ensures alignment with FI\$Cal and State Controller's Office reporting standards, and advises executive leadership on fiscal impacts and resource allocation decisions.</li> </ul>
<b>Supervision Received:</b>	Reports directly to and receives the majority of assignments from the Fiscal and Business Services Manager (Manager II); however, direction and assignments may also come from the Deputy State Auditor, Administration.
<b>Supervision Exercised:</b>	None
<b>Special Requirements:</b>	None
<b>Working Conditions:</b>	<ul style="list-style-type: none"> <li>• This position is eligible for participation in the office's hybrid telework program. Work at the alternate work location must be in California and conducted in a space that is ergonomically sound, private, distraction-free, and has safe working conditions to be eligible to telework.</li> <li>• Work performed in the office is in an air-conditioned high-rise building with elevator access and both natural and artificial lighting.</li> <li>• Work may require sitting for an extended period of time using a personal computer and the use of standard office equipment, such as phones, copiers or scanners.</li> <li>• Year-end accounting activities peak during the summer months of July and August. Accounting staff must be able to work overtime during this period and vacation time may not be approved.</li> <li>• Work may require periodic non-standard work hours and work during weekends to meet workload needs and demands.</li> </ul>
<b>Position DS REV Date:</b>	01/20/2026

### **SIGNATURES**

I have discussed the duties of the position with the employee.

\_\_\_\_\_  
Supervisor's signature

\_\_\_\_\_  
Date

By signing this document, I acknowledge that I have received, read, and understand the duties listed in the duty statement above and I can perform these duties with or without a reasonable accommodation. I understand that the

duty statement is not considered an all-inclusive list of working requirements and that I may perform other duties as assigned within my classification. Duties of this position are subject to change and may be revised as needed or required.

\_\_\_\_\_  
Incumbent's signature

\_\_\_\_\_  
Date

Note: If a reasonable accommodation is necessary or you are unsure, please contact [Human Resources](#) to begin the interactive process.