

State of California - Department of Social Services

DUTY STATEMENT

EMPLOYEE NAME:

CLASSIFICATION:

Manager II

POSITION NUMBER:

800-677-4802-004

DIVISION/BRANCH/REGION: (UNDERLINE ALL THAT APPLY)

Finance & Accounting/Fiscal Forecasting Branch

BUREAU/SECTION/UNIT: (UNDERLINE ALL THAT APPLY)

Children, Adults, and Housing Programs Estimates Bureau

SUPERVISOR'S NAME:

Raymond Uliassi

SUPERVISOR'S CLASS:

CEA A

SPECIAL REQUIREMENTS OF POSITION (CHECK ALL THAT APPLY):

- ☐ Designated under Conflict of Interest Code.
- ☐ Duties require participation in the DMV Pull Notice Program.
- ☐ Requires repetitive movement of heavy objects.
- ☐ Performs other duties requiring high physical demand. (Explain below)
- ☒ None
- ☐ Other (Explain below)

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

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

SUPERVISOR'S SIGNATURE



DATE

8/11/2026

EMPLOYEE'S SIGNATURE

DATE

SUPERVISION EXERCISED (Check one):

- ☐ None ☒ Supervisor ☐ Lead Person ☐ Team Leader

FOR SUPERVISORY POSITIONS ONLY: Indicate the number of positions by classification that this position DIRECTLY supervises.

The Manager II directly supervises one Supervisor II, one Analyst III, One RDS II and two RDS I.

Total number of positions for which this position is responsible: 5

FOR LEADPERSONS OR TEAM LEADERS ONLY: Indicate the number of positions by classification that this position LEADS.**MISSION OF ORGANIZATIONAL UNIT:**

The Fiscal Forecasting Branch (FFB) is comprised of three Bureaus: Child Care and Fiscal Services Bureau, Family Engagement and Equity Estimates Bureau and Children and Adult Programs Estimate Bureau. The Branch plays a key role in developing fiscal policy, working with the Department's core programs to develop the Local Assistance Budget and meeting the research and data needs required for sound decision-making.

The Estimates Bureaus develop the annual Local Assistance Governor's Budget and May Revision update for the programs administered by the County Welfare Departments, Tribes, and non-governmental organizations. In addition, these bureaus are responsible for providing a fiscal analysis of proposed legislative bills that have a potential fiscal impact to the Department.

CONCEPT OF POSITION:

Under the general direction of the Fiscal Forecasting Branch Chief (Career Executive Assignment A), the Manager II provides leadership for the Children and Adult Programs Estimates Bureau. The position is responsible for leading the development of the Local Assistance portion of the annual Governor's Budget and subsequent May Revision consistent with the goals of the department, the California Health and Human Services Agency, and Governor and overseeing the development and maintenance of complex calculations related to caseload. This responsibility also includes the development of budgetary strategies and policies affecting a large array of Departmental programs including In-Home Supportive Services, SSI/SSP, Child Welfare, and Housing.

A. RESPONSIBILITIES OF POSITION:

- 25% Leads the development of budgeting strategies, policy changes, and fiscal estimates for major CDSS programs, as well as the release of this sensitive information to the various control agencies. Consults with Executive Management in designing funding strategies to address state budget and program priorities and advises the California Health and Human Services Agency (CHHSA), the Department of Finance (DOF), and the Governor's Office on proposed budgetary policy and its fiscal and caseload implications.
- 20% Leads the development of the appropriate program and policy assumptions to be used in developing estimates for the state budget as well as fiscal analysis related to state and federal legislation. This includes close collaboration with internal Program, Research, Fiscal and Office of Legislation partners, as well as counties and external stakeholders. Ensures the appropriate budgeting of various federal, state and local fund sources to support the intended policy purpose. Provides recommendations to inform policy decisions that would comply with federal program requirements and assist the state in avoiding severe fiscal penalties.
- 15% Collaborates with Program and Fiscal Management at all levels within CDSS in the development and release of policy directives to County Welfare Departments and other partner agencies. Recommends policy changes and statutory language and directs the development of budget estimates for those policy changes. Reviews legislation for policy and fiscal implications. Verifies that all documents issued by the Department for external release reflect policy consistent with the estimates.
- 15% Directs the development of the annual Governor's Budget and subsequent May Revision for the designated programs in the Bureau. Directs the preparation of all estimates and associated caseload projections which entails the review of the overall logic of the methodologies to ensure that the defense of the data sources and assumptions used in producing estimates and caseload projections are logical, accurate and supportable. Develops arguments in support of estimates used in legislative hearings and in response to inquiries from DOF, the LAO and external stakeholders.
- 10% Directly supervises one Supervisor II, two Supervisor Is, and one RDS III who are responsible for preparing the fiscal impacts and caseload projections associated with proposed state and federal law changes, regulations, court decisions, and Program policy proposals. This includes providing oversight of the planning systems that track historical data and policy changes, as well as data bases that maintain longitudinal and sample caseload characteristics information. This also includes managing personnel issues, training, staff development and other needs.
- 10% Advises Department leadership on strategies for negotiation with legislators, DOF, Legislative Analysts Office (LAO) and County Welfare Directors Association (CWDA) staff. Present and brief Legislative Staff on policy issues implicit in budget proposals and new legislation. Works closely with CHHSA and DOF staff on cost impact drills and budget strategies. Assists in the preparation of testimony for budget and policy hearings and may be called upon to testify at Legislative hearings.
- 5% Advises the Branch on strategic and organizational planning for the Bureau. Develops cross-bureau and cross -division analytical and documentation standards, correspondence, special estimates and legislative reviews.

B. SUPERVISION RECEIVED:

Receives general direction from and reports to the Fiscal Forecasting Branch Chief.

C. ADMINISTRATIVE RESPONSIBILITY:

May fill in for the Fiscal Forecasting Branch Chief in his/her absence for all administrative and estimating matters. Assists the Fiscal Forecasting Branch Chief in leading the overall estimate development process for the Governor's Budget and May Revision. Serves as the primary Department liaison with DOF and LAO. The state's chronic budget problem places significant demands on the Manager II position and dictates a high level of responsibility and a significant role in the development of executive decisions and policies related to the Local Assistance budget. The scope of these responsibilities is correlated with the state's systemic budget problem, particularly since the Local Assistance budget is heavily supported by the General Fund; budget cuts, program changes, and efficiency initiatives drive the workload and the level of responsibility of this position. The Manager II is an essential contributor to the CDSS executive management team's policy decision-making processes.

D. PERSONAL CONTACTS:

The Manager II has daily contact with all levels of CDSS employees including Deputy Directors, and frequent contact with the Department's Chief Deputy Directors and Director, as well as with the CHHSA, DOF, LAO, and legislative staff. The Manager II represents CDSS in meetings with other stakeholders, such as CWDA.

E. ACTIONS AND CONSEQUENCES:

The Manager II is frequently the Department's spokesperson for Local Assistance policy issues assumed in the budget proposals. As such, this person must defend the Department's budgetary strategies to various control agencies and to other interested parties. Because this person supervises the development of the Children, Housing, and Adult Programs portion of the Department's over \$39 billion budget judgment is critical. Failure to accurately perform the required activities on a timely basis could result in significant fiscal implications as well as a significant loss in CDSS credibility. This manager works regularly with Executive Management within the Department and with principal staff at DOF and LAO to inform major policy making.

F. OTHER INFORMATION:

The estimates prepared by the Estimates Bureau are the foundation for the Governor's Budget as well as other legislation and are therefore subject to legislative schedules and time frames. There are times throughout the year when mandatory overtime becomes a requirement for analysts, supervisors, and the manager in the Bureau to meet such deadlines. To meet statutorily mandated budgetary time frames, the Manager II is required to work extensive hours beyond the normal eight-hour workday.