

Duty Statement – Workforce

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Duty Statement

☐ Current ☒ Proposed

RPA Number:	Classification Title: Analyst I	Position Number: 673-820-5157-820
Incumbent Name: Vacant	Working Title: Budget Analyst I	Effective Date: Click or tap to enter a date.
Tenure: Permanent	Time Base: Full-Time	Intermittent Hours Per Month: N/A
Division/Office: Fiscal Services Division	Section/Unit: Program Resources Support Section/Program Support Unit B	Reporting Location: Sacramento
Supervisor's Name: Joshua McCarty	Supervisor's Classification: Supervisor I	CBID: R01
Confidential Designation: ☐ Yes ☒ No	Designated Position for Conflict of Interest: ☒ Yes ☐ No	Position Telework Eligible: ☒ Yes ☐ No
Supervision Exercised: ☒ None ☐ Lead		

General Statement

The Fiscal Services Division's Budget Branch manages and oversees budget development, monitoring, and financial planning activities for the California Air Resources Board (CARB) and the California Environmental Protection Agency. The branch supports programs in developing and maintaining their budgets, tracking expenditures, and aligning resources with program priorities. It provides clear guidance and training on budget policies and procedures, strengthens internal fiscal controls, supports continuous process improvements, and ensures compliance with applicable state and federal financial requirements.

Competencies

All employees are responsible for understanding and demonstrating the core competencies of collaboration, communication, customer engagement, digital fluency, diversity and inclusion, innovative mindset, interpersonal skills, and resilience.

Position Description

Under supervision of a Supervisor I, the incumbent performs analytical and technical work to support program budget review and fiscal tracking activities within Program Support Unit B. The position is responsible for preparing documentation, reviewing financial data, and ensuring adherence to applicable budget policies and procedures. The incumbent contributes to the goals of the Section by promoting fiscal accuracy and operational consistency.

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% of Time	Essential Functions
35%	Assist with annual budgetary allotment for assigned divisions based on historical data, new resources and department-wide operational needs. Under supervision, prepare monthly divisional expenditures reports, identify potential allotment shortages, project future expenditure deficiencies/overages, and assist with overall budget analysis and recommendations to program staff and management. Help to coordinate with accounting and program staff to reconcile monthly expenditure and encumbrance reports in accordance with budget plans and associated changes. Attend monthly meetings with divisions to review expenditure and encumbrance data and address funding needs or changes. Act as liaison for the Budget Branch and meet with program and administrative staff, including management of various units throughout CARB to reconcile legacy system data, FI\$Cal reports, procurement of goods and services, and local assistance grants in accordance with budget authority, funding plans, and special requests as needed.
35%	Support with processing budgetary information for procurement of goods and services and approve purchase orders in FI\$Cal database for CARB and CalEPA. Review purchase estimates, requisitions, and contracts to ensure fiscal accuracy and compliance of expenditures in accordance with established policies and procedures. Review and approve budgetary component of contract and grant agreements, grant awards and disbursement requests, and provide fiscal recommendations to division and administrative staff in execution of grant agreements. Coordinate with procurement and accounting staff on necessary changes to funding information of procurement items for goods and services and/or grant agreements. Provide fund coding structure, approve acquisition documents, process request for personnel actions.
20%	Provide support for assigned program staff with miscellaneous budgetary questions and clarifications.

% of Time	Marginal Functions
10%	Assist with special projects, develop budgetary tracking tools, and work on other assignments as needed.

Typical Physical Conditions/Demands

Work is performed in a climate-controlled office environment.

Requires prolonged periods of sitting at a desk and working on a computer.

Involves frequent use of standard office equipment such as computers, phones, copiers, and printers.

May require occasional lifting and carrying of materials weighing up to 25 pounds.

Requires visual acuity to read and prepare documents and use a computer screen.

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Typical Working Conditions

Work is performed in a climate-controlled office environment.

Involves prolonged periods of sitting at a desk and working on a computer.

May require frequent interaction with staff, stakeholders, or the public via phone, email, or video conferencing.

Noise levels are typically low to moderate.

May involve occasional travel to attend meetings or trainings.

Special Requirements of Position (Check all that apply):

- ☐ Duties may require pre-employment and routine screenings (background/criminal/fingerprint clearance, drug testing, fingerprinting, physical, etc.).
- ☐ Duties require participation in the DMV Pull Notice Program.
- ☐ Performs other duties requiring high physical demand. (Explain below)
- ☐ Requires repetitive movement of heavy objects and/or operation of heavy machinery or motorized vehicles.
- ☐ Travel up to _____ percentage
- ☐ Bilingual Fluency needed in _____(language)
- ☐ Other-

Supervisor Statement

I certify that this duty statement accurately describes the essential functions of this position. I have discussed the duties of this position with the employee and provided the employee with a copy of this duty statement.

Supervisor Name:	Supervisor Signature:	Date: Date
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Employee Statement

I have discussed these duties with my supervisor and have been provided a copy of this duty statement. I certify that I have read, understand, and can perform the duties of this position either with or without reasonable accommodation*.

** Reasonable accommodation is any modification or adjustment made to a job, work environment, or employment practice or process that enables an individual with a disability or medical condition to perform the essential functions of his or her job or to enjoy an equal employment opportunity. (If you believe reasonable accommodation is necessary, check yes. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Reasonable Accommodation Coordinator.)*

Do you need reasonable accommodation to perform the essential functions of this position?

☐ Yes ☐ No

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Employee Name:	Employee Signature:	Date: Date
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Duty Statement

☐ Current ☒ Proposed

RPA Number:	Classification Title: Analyst II	Position Number: 673-820-5393-820
Incumbent Name: Vacant	Working Title: Budget Analyst II	Effective Date: Click or tap to enter a date.
Tenure: Permanent	Time Base: Full-Time	Intermittent Hours Per Month: N/A
Division/Office: Fiscal Services Division	Section/Unit: Program Resources Support Section/Program Support Unit B	Reporting Location: Sacramento
Supervisor's Name: Joshua McCarty	Supervisor's Classification: Supervisor I	CBID: R01
Confidential Designation: ☐ Yes ☒ No	Designated Position for Conflict of Interest: ☒ Yes ☐ No	Position Telework Eligible: ☒ Yes ☐ No
Supervision Exercised: ☒ None ☐ Lead		

General Statement

The Fiscal Services Division's Budget Branch manages and oversees budget development, monitoring, and financial planning activities for the California Air Resources Board (CARB) and the California Environmental Protection Agency. The branch supports programs in developing and maintaining their budgets, tracking expenditures, and aligning resources with program priorities. It provides clear guidance and training on budget policies and procedures, strengthens internal fiscal controls, supports continuous process improvements, and ensures compliance with applicable state and federal financial requirements.

Competencies

All employees are responsible for understanding and demonstrating the core competencies of collaboration, communication, customer engagement, digital fluency, diversity and inclusion, innovative mindset, interpersonal skills, and resilience.

Position Description

Under direction of a Supervisor I, the incumbent performs analytical and technical work to support program budget analysis and fiscal reporting activities within Program Support Unit B. The position is responsible for analyzing financial data, preparing reports, and ensuring adherence to applicable budget policies and procedures. The incumbent contributes to the goals of the Section by promoting accurate financial oversight and compliance.

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% of Time	Essential Functions
35%	Independently work with annual budgetary allotment for assigned divisions based on historical data, new resources and department-wide operational needs. Prepare monthly divisional expenditures reports, identify potential allotment shortages, project future expenditure deficiencies/overages, and provide overall budget analysis and recommendations to program staff and management. Coordinate with accounting and program staff to reconcile monthly expenditure and encumbrance reports in accordance with budget plans and associated changes. Conduct monthly meetings with divisions to review expenditure and encumbrance data and address funding needs or changes. Act as liaison for the Budget Branch and meet with program and administrative staff, including management of various units throughout CARB to reconcile legacy system data, FI\$Cal reports, procurement of goods and services, and local assistance grants in accordance with budget authority, funding plans, and special requests as needed.
35%	Process budgetary information for procurement of goods and services, and approve purchase orders in FI\$Cal database for CARB and CalEPA. Review purchase estimates, requisitions, and contracts to ensure fiscal accuracy and compliance of expenditures in accordance with established policies and procedures. Review and approve budgetary component of contract and grant agreements, grant awards and disbursement requests, and provide fiscal recommendations to division and administrative staff in execution of grant agreements. Independently coordinate with procurement and accounting staff on necessary changes to funding information of procurement items for goods and services and/or grant agreements. Assist with the creation of new service locations and other coding to properly process and track expenses. Independently provide fund coding structure, approve acquisition documents, process request for personnel actions.
20%	Provide support for assigned program staff with miscellaneous budgetary questions and clarifications.

% of Time	Marginal Functions
10%	Assist with special projects, develop budgetary tracking tools, and work on other assignments as needed under the scope of the classification.

Typical Physical Conditions/Demands

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Supervisor Name: Joshua McCarty	Supervisor Signature:	Date: Date
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accommodation, inform the hiring supervisor, who will discuss your concerns with the Reasonable Accommodation Coordinator.)

Do you need reasonable accommodation to perform the essential functions of this position? ☐ Yes ☐ No		
Employee Name:	Employee Signature:	Date: Date