



DUTY STATEMENT

SHADED AREA FOR HUMAN RESOURCES ONLY

INSTRUCTIONS: Refer to the Essential Functions Duty Statement Preparation and Construction Manual for Instructions

RPA:

EFFECTIVE DATE:

1. AGENCY Public Employment Relations Board		POSITION NUMBER (Agency - Unit - Class - Serial)	
2. UNIT NAME AND CITY LOCATED Administrative Services Division		3. CLASS TITLE Analyst I	
4. WORKING HOURS/SCHEDULE TO BE WORKED 8:00 am – 5:00 pm		5. SPECIFIC LOCATION ASSIGNED TO Sacramento	
6. PROPOSED INCUMBENT		7. CURRENT POSITION NUMBER (Agency - Unit - Class - Serial)	
YOU ARE A VALUED MEMBER OF THE BOARD'S TEAM. YOU ARE EXPECTED TO WORK COOPERATIVELY WITH TEAM MEMBERS AND OTHERS TO PROVIDE THE HIGHEST LEVEL OF SERVICE POSSIBLE. YOUR CREATIVITY AND PRODUCTIVITY ARE ENCOURAGED. YOUR EFFORTS TO TREAT OTHERS FAIRLY, HONESTLY AND WITH RESPECT ARE IMPORTANT TO EVERYONE WHO WORKS WITH YOU.			
8. BRIEFLY (1 - 3 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under supervision of the Supervisor I, the Analyst I assists with developing and maintaining a \$20.1 million budget, assists with accounting functions, and provides backup for other administrative responsibilities in support of a small administrative operation.			
9. Percentage of time performing duties	10. Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. <i>(Use additional sheet if necessary)</i>		
25%	ESSENTIAL FUNCTIONS Review all Department of Finance Budget Letters for impact to PERB and report on impact and workload requirements to management. Prepare budget schedules (e.g., salaries and wages, change and authorized positions) to produce the Governor's Budget using financial records for prior year, current and budget year. Complete technical budget documents including budget revisions, budget galleys, associated schedules, and supporting documentation in accordance with the State Administrative Manual (SAM), applicable policies, and following Department of Finance (DOF) instructions. Reconcile Board's appropriations with State Controller's Office (SCO), DOF publications and reports to maintain accurate budget authority. Upload, reconcile, and maintain PERB's annual budget at the detailed level in FI\$Cal, to maintain accuracy. Work with accounting staff, DOF, and SCO to resolve any funding discrepancies.		
20%	Develop and maintain budget projections for expenditures and reimbursements to keep management informed of expenditures versus budget balance, monitor for unforeseen costs, and capitalize on savings for other needs. Monitor expenditures of spending and correct allocations in compliance with the SAM and appropriate government codes. Discuss future program plans and needs with management to identify level of funding, including upcoming IT projects and their associated timelines. Provide line-item detail and prepare visual summaries of key budget components, distributions and trends, utilizing tables, charts and/or graphs. Maintain historical records of past authorized budgets and fiscal year expenditures for identification of trends, and cost increase or decreases. Report anomalies and propose appropriate action when necessary. Utilize various FI\$Cal reports and review of other accounting records in order to monitor and validate that expenditures and encumbrances will commensurate with PERB guidelines. Coordinate with Accounting and Human Resources staff by verifying, obtaining, and providing fiscal and position control information to implement the approved budget. Analyze prior-year encumbrances to ensure current-year projections factor in multi-year authority for procurements. Coordinate with management to cost out anticipated staffing or expenditure changes associated with new or proposed legislation.		



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20% 15% 10% 10%	ESSENTIAL FUNCTIONS, CONT. Assist Accounting staff when necessary, including but not limited to, reviewing batches, inputting and keying transactions, verifying deposit amounts, and approving keyed batches by other staff. Assist with performing fiscal year-end activities: Identify reverting appropriations and update Appropriation Symbol table accordingly; analyze and resolve errors arising from the automated processes to liquidate reverting encumbrances and/or reclassify receivables processes. Assist with development and maintenance of FI\$Cal reports as necessary for tracking and monitoring. Assist with developing administrative Budget Change Concepts (BCCs) and Budget Change Proposals (BCPs) as necessary for changes to the existing budget, factoring in the potential impact of new legislative mandates. Ensure BCCs/BCPs comply with State policies, by reviewing and editing narrative descriptions and developing fiscal details and analysis. Coordinate necessary changes in the document with managers to ensure it is well written and the fiscal and workload analyses support the proposal. Maintain file of historical BCPs and associated funding and position authorizations. Review and post budget transactions into the FI\$Cal system, utilizing Hyperion as needed. Identify and correct anomalies. Participate in fiscal drills by coordinating response from administrative staff and management, reviewing for fiscal integrity and consistency with approved budgets and accepted fiscal costing methods. Research information requests from management, Labor & Workforce Development Agency, DOF, and the Legislature. Draft written responses and reports as necessary. Perform a variety of administrative job-related duties as required to support a small administrative operations office. KNOWLEDGE & ABILITIES <i>Knowledge of:</i> Principles, practices, and trends of public and business administration, management, supportive staff services, and governmental functions and organization. <i>Ability to:</i> 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.



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	DESIRABLE QUALIFICATIONS • Ability to work well with a team or independently. • Ability to organize, set priorities, and work on multiple tasks. • Ability to work under time constraints and focus attention to detail. • Ability to provide excellent customer service. • Strong ethics. • Advanced knowledge of Microsoft Excel. • College level coursework in Accounting/Fiscal. INTERPERSONAL SKILLS • Ability to take and follow directions from supervisor • Ability to focus on detail • Ability to be flexible and thrive on challenges • Ability to communicate clearly and effectively	
11. SUPERVISOR'S STATEMENT: <i>I HAVE DISCUSSED THE DUTIES OF THE POSITION WITH THE EMPLOYEE</i>		
SUPERVISOR'S NAME (Print)	SUPERVISOR'S SIGNATURE	DATE
12. EMPLOYEE'S STATEMENT: <i>I HAVE DISCUSSED WITH MY SUPERVISOR THE DUTIES OF THE POSITION AND HAVE RECEIVED A COPY OF THE DUTY STATEMENT</i>		
The statements contained in this duty statement reflect general details as necessary to describe the principal functions of this job. It should not be considered an all-inclusive listing of work requirements. Individuals may perform other duties as assigned, including work in other functional areas to cover absence of relief, to equalize peak work periods or otherwise to balance the workload.		
EMPLOYEE'S NAME (Print)	EMPLOYEE'S SIGNATURE	DATE



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RPA:

EFFECTIVE DATE:

1. AGENCY Public Employment Relations Board		POSITION NUMBER (Agency - Unit - Class - Serial)	
2. UNIT NAME AND CITY LOCATED Administrative Services Division		3. CLASS TITLE Analyst II	
4. WORKING HOURS/SCHEDULE TO BE WORKED 8:00 am – 5:00 pm		5. SPECIFIC LOCATION ASSIGNED TO Sacramento	
6. PROPOSED INCUMBENT		7. CURRENT POSITION NUMBER (Agency - Unit - Class - Serial)	
YOU ARE A VALUED MEMBER OF THE BOARD'S TEAM. YOU ARE EXPECTED TO WORK COOPERATIVELY WITH TEAM MEMBERS AND OTHERS TO PROVIDE THE HIGHEST LEVEL OF SERVICE POSSIBLE. YOUR CREATIVITY AND PRODUCTIVITY ARE ENCOURAGED. YOUR EFFORTS TO TREAT OTHERS FAIRLY, HONESTLY AND WITH RESPECT ARE IMPORTANT TO EVERYONE WHO WORKS WITH YOU.			
8. BRIEFLY (1 - 3 sentences) DESCRIBE THE POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS Under direction of the Supervisor I, the Analyst I assists with developing and maintaining a PERB's budget, assists with accounting functions, and provides backup for other administrative responsibilities in support of a small administrative operation.			
9. Percentage of time performing duties	10. Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. <i>(Use additional sheet if necessary)</i>		
20%	ESSENTIAL FUNCTIONS Independently review Department of Finance (DOF) Budget Letters and other communications for impact to PERB, report on impact and workload requirements to management, and recommend a course of action. Prepare budget schedules (e.g., salaries and wages, change and authorized positions) to produce the Governor's Budget using financial records for prior year, current, and budget year. Complete technical budget documents including budget revisions, budget galleys, associated schedules, and supporting documentation in accordance with the State Administrative Manual (SAM), applicable policies, and DOF Budget Letters. Reconcile Board's appropriations with State Controller's Office (SCO), DOF publications, and internal documentation to maintain accurate budget authority data. Upload, reconcile, and maintain PERB's annual budget at a detailed level in FISCAL, to maintain accuracy. Work with accounting staff, DOF, and SCO to resolve any funding discrepancies. Analyze, coordinate and resolve sensitive and/or most complex budget related issues and projects. Review and post budget transactions into Hyperion. Identify and correct anomalies. Participate in fiscal drills by coordinating response from administrative staff and management, reviewing for fiscal integrity and consistency with approved budgets and accepted fiscal costing methods. Research information requests from management, Labor & Workforce Development Agency, DOF, and the Legislature. Draft written responses and reports as necessary.		



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9. Percentage of time performing duties	10. Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. <i>(Use additional sheet if necessary)</i>
	ESSENTIAL FUNCTIONS, CONT. 20% Develop and maintain budget projections for expenditures and reimbursements to keep management informed of expenditures versus budget balance, monitor for unforeseen costs, and capitalize on savings for other needs. Monitor expenditures and correct allocations in compliance with the SAM and appropriate government codes. Discuss future program plans and needs with management to identify level of funding, including upcoming projects and their associated timelines. Provide line-item detail and prepare visual summaries of key budget components, distributions, and trends, utilizing tables, charts and/or graphs. Maintain historical records of past authorized budgets and expenditures for identification of trends, and cost increase or decreases. Report anomalies and propose appropriate action when necessary. Utilize various FI\$Cal reports to monitor and validate expenditures and encumbrances commensurate with PERB guidelines. Coordinate with Accounting and Human Resources to verify, obtain, and provide fiscal and position control information to implement the approved budget. Analyze prior-year encumbrances to ensure current-year projections factor in multi-year authority for procurements. Coordinate with management and program staff to cost out anticipated staffing or expenditure changes associated with new or proposed legislation. 20% Work on special projects requiring detailed research and analysis such as policy development, development of FI\$Cal reporting and templates, and others related to administrative process improvements, applying project management processes and skills. Assist with fiscal audit preparations, coordinate audit processes, and develop, track and execute corrective action plans. 15% As the Travel Coordinator, maintain the PERB Travel Guide and respond to user's questions. Act as liaison between employees and DGS Travel Program/Concur and resolve systems errors with SCO staff. Perform review and approval of self-registered Concur accounts of new employee. Coordinate and book travel arrangements for staff and non-employee when necessary. Attend quarterly travel meetings and convey any relevant Travel Bulletins to PERB travelers. Provide consultation and training on travel processes as needed. 10% Assist with various accounting functions including but not limited to: Office Revolving Fund (ORF) reconciliation, check voids, reporting, posting journal entries, and replenishments; disbursement packages for employees; research and resolve bank reconciliation issues; communicate with CFS/SCO to resolve revolving fund or travel transaction issues; research and resolve discrepancies between reports and internal source documents; assist with fiscal year-end activities; and develop FI\$Cal reports as necessary for tracking and monitoring. 10% Draft administrative Budget Change Concepts (BCCs) and Budget Change Proposals (BCPs) as necessary for changes to the existing budget, factoring in the potential impact of new legislative mandates. Ensure BCCs/BCPs comply with State policies, by reviewing and editing narrative descriptions and developing fiscal details and analysis. Coordinate necessary changes in the document with managers to ensure it is analytically sound, and the fiscal and workload analyses support the proposal. Maintain file of historical BCPs and associated funding and position authorizations.



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5%	NON ESSENTIAL FUNCTIONS Perform a variety of administrative job-related duties as required to support a small administrative operation. Serve as a backup to other Division of Administrative Services staff. KNOWLEDGE & ABILITIES <i>Knowledge of:</i> Principles, practices, and trends of public and business administration, management, supportive staff services, governmental functions and organization, and methods and techniques of effective communication and leadership. <i>Ability to:</i> 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; gain and maintain the confidence and cooperation of those contacted during the course of work; and coordinate the work of others, act as a team leader, and appear before legislative or other committees. DESIRABLE QUALIFICATIONS • Ability to work well with a team and independently • Ability to organize, set priorities, and work on multiple tasks/projects • Ability to work under time constraints and focus attention to detail • Ability to provide excellent customer service • Ability to maintain a high level of professionalism and ethical behavior • Advanced knowledge of Microsoft Excel • Proficiency in MS Office applications • Operational knowledge of the state's accounting database system SPECIAL PERSONAL CHARACTERISTICS • Excellent oral and written communication skills • Dependability and excellent attendance record • Excellent interpersonal skills • Excellent active listening skills • Proficiency in MS Office applications
11. SUPERVISOR'S STATEMENT: <i>I HAVE DISCUSSED THE DUTIES OF THE POSITION WITH THE EMPLOYEE</i>	
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