

DUTY STATEMENT

DS 3022 (09/2026)

**OPERATIONS
FINANCIAL MANAGEMENT DIVISION
FISCAL FORECASTING BRANCH
BUDGET SECTION
HEADQUARTERS AND TECHNICAL UNIT**

DUTY STATEMENT

JOB TITLE: Analyst II

POSITION #: 472-531-5393-917

WORKING TITLE: Budget Analyst

EMPLOYEE:

POSITION DESCRIPTION: Under direction of a Supervisor I, the Analyst II is responsible for a variety of budgetary work at a more complex level. The position is responsible for analytical, research, initiative, independence of action, and good judgment. This position performs the more complex oversight of fiscal and business practices and involves knowledge as it relates to the preparation and maintenance of State-Operated Facilities, capital outlay needs, and Headquarters' budget.

SUPERVISION EXERCISED: None.

SUPERVISION RECEIVED: Reports to and under direction of Supervisor I of the Headquarters and Technical Unit.

EXAMPLES OF DUTIES:

Essential Job Functions:

- 35% Prepare program's annual allocations, develop monthly and annualized expenditure projections, and analyze expenditures for appropriate coding and funding authority; present the findings to management; and prepare budget revisions and section letters. Lead complex budget requests, analyze fiscal and policy impacts and recommend appropriate budgetary action. Run reports to obtain data from The Financial Information System for California (FI\$Cal) Peoplesoft.
- 35% Evaluate and organize budget preparation; review and prepare the development of the Governor's Budget; evaluate program budget change proposals and finance letters; provide recommendations to management; and prepare and schedule appropriations. Review and enter data into and run reports in FI\$Cal Hyperion.
- 25% Review and analyze legislation and regulations for fiscal impact; analyze position authority documents; review and research contract and purchase requests for appropriate funding and fiscal coding; and provide budget information and technical assistance to program management and staff.

JOB TITLE: Analyst II

POSITION #: 472-531-5393-917

Marginal Job Functions:

5% Work collaboratively with department staff (program, personnel, accounting, fiscal systems and contracts) and other departments including control agencies (i.e. Department of Finance,) to provide budget and fiscal information. Other duties assigned within the scope of the classification.

WORKING CONDITIONS: Work is performed in an open-spaced partitioned office environment. This position is a hybrid, in-office/telework position, and may be subject to change. Incumbent can be required to report to the office, or any designated location at any time. Telework agreements can be modified and/or cancelled at any time.

DESIRABLE QUALIFICATIONS:

Knowledge of: Budgeting, forecasting, accounting, and/or contracts; proficient in Microsoft Word, Excel, Outlook, and Teams.

Ability to: Interact with departmental headquarters staff, and other related agency personnel; provide excellent customer service skills; excellent communication and analytical skills; work independently and with a team; organize and prioritize workload to meet established deadlines.

CERTIFICATION OR LICENSE: None

Employee Name
(Print)

Employee Signature

Date

Supervisor Name
(Print)

Supervisor Signature

Date

Employee and Supervisor acknowledge that by signing this Duty Statement that they have discussed and agree to the expectations of the position.

DUTY STATEMENT

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DUTY STATEMENT

JOB TITLE: Analyst I

POSITION #: 472-531-5157-917

WORKING TITLE: Budget Analyst

EMPLOYEE:

POSITION DESCRIPTION: Under the supervision of a Supervisor I, the Analyst I performs budget preparation, development, monitoring, and control of the Department's budget and performs analytical work of less complexity in the preparation and maintenance of State-Operated Facilities, capital outlay needs, and Headquarters' budget.

SUPERVISION EXERCISED: None.

SUPERVISION RECEIVED: Reports to, and under supervision of the Supervisor I of the Headquarters and Technical Unit.

EXAMPLES OF DUTIES:

Essential Job Functions:

- 35% Assist in preparing program's annual allocations. Accommodate the development of monthly and annualized expenditure projections and analyze expenditures for appropriate coding and funding authority to management. Provide budget revisions and section letters. Assist in reviewing budget requests for fiscal and policy impacts and recommend appropriate budgetary action. Conduct reports to obtain data from The Financial Information System for California (FI\$Cal) Peoplesoft. Review Department of Finance drills and upload to FI\$Cal Hyperion. Assist with the creation of desk procedures for various process in the budget section to be utilized by others.
- 30% Evaluate and organize budget preparation; review and prepare the development of the Governor's Budget; conduct and review program budget change proposals and finance letters; provide recommendations to management; and prepare and schedule appropriations review.
- 30% Under supervision, research and complete budgetary information for contracts and submit for review to management. Monitor a group email box and assign tasks to the appropriate analysts.

JOB TITLE: Analyst I

POSITION #: 472-531-5157-700

Review and analyze legislation and regulations for fiscal impact: analyze position authority documents; review purchase requests for appropriate funding and fiscal coding; and provide budget information and technical assistance to program management and staff

Marginal Job Functions:

5% Collaborate with the Department's staff and other departments to provide budget and fiscal information. Other duties assigned within the scope of the classification.

WORKING CONDITIONS: Work is performed in an open spaced partitioned office. This position is a hybrid, in-office/telework position, and may be subject to change. Incumbent can be required to report to the office, or any designated location at any time. Telework agreements can be modified and/or cancelled at any time.

DESIRABLE QUALIFICATIONS:

Knowledge of: Budgeting, forecasting, accounting, and/or contracts; proficient in Microsoft Word, Excel, Outlook, and Teams.

Ability to: Interact with departmental headquarters staff, and other related agency personnel; provide excellent customer service skills; excellent communication and analytical skills; work independently and with a team, organize and prioritize workload to meet established deadlines.

CERTIFICATION OR LICENSE: None.

Employee Name
(Print)

Employee Signature

Date

Supervisor Name
(Print)

Supervisor Signature

Date

Employee and Supervisor acknowledge that by signing this Duty Statement that they have discussed and agree to the expectations of the position.