

Duty Statement – Workforce

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Duty Statement

☐ Current ☒ Proposed

RPA Number:	Classification Title: Analyst II	Position Number: 673-820-5393-976
Incumbent Name: Vacant	Working Title: Budget Analyst	Effective Date: Click or tap to enter a date.
Tenure: Limited-Term	Time Base: Full-Time	Intermittent Hours Per Month:
Division/Office: Fiscal Services Division	Section/Unit: Budget Policy & Development Section / Budget Development & Analysis Unit	Reporting Location: Sacramento
Supervisor's Name: Emmanuel Brown	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 the direction of the Budget Manager (Supervisor I), the Budget Analyst (Analyst II) performs complex and responsible technical budget work involving the coordination, development, preparation, administration, review, and control of the budget. The position provides consultative budget services to program staff and management and serves as a liaison with other Boards, Departments, Offices (BDO), and control agencies to coordinate and resolve complex multi-BDO budget issues. Duties include preparing complex budget reports and cross-training budget staff on assigned functions. The position also directly assists Program, Accounting, Contracts, Procurement, Grants, and Budget staff

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with budgetary transactions, including requisitions, payments, and reconciliation of expenditures and encumbrances. Overtime may be required.

% of Time	Essential Functions
35%	Budget Development and Control Assist with annual allocation and budget activities. Prepare and review CARB's baseline budget, budget revisions, and overall budget development process. Complete annual exercises such as Past Year Adjustments and the Fund Balance Reconciliation Drill, as well as supplementary schedules for the Department of Finance (DOF) and State Controller's Office (SCO). Provide technical reviews for BCPs and prepare fiscal detail sheets. Reconcile Budget Galleys, Language Sheets, and Budget Bills to ensure proper implementation of budget adjustments and proposals. Provide additional technical support through development of workload analyses, program-specific justifications, and related activities, and ensure all budget actions are uploaded into the Hyperion database.
35%	Budget Monitoring, Analysis, and Reporting Prepare, maintain, and monitor budget authority for State Operations and Local Assistance appropriations by generating monthly and ad hoc reports from FI\$Cal and calculating year-end balance projections. Analyze funding requirements across multiple program elements, allocations, and expenditures to ensure compliance with applicable provisions, regulations, and guidelines. Prepare monthly enterprise expenditure reports and dashboards to identify potential allotment shortages, project future expenditure deficiencies or overages, and provide budget analysis and recommendations to program staff and management. Coordinate with accounting and program staff to reconcile monthly expenditure and encumbrance reports with budget plans and associated changes. Meet with staff and executives to discuss budget issues, FI\$Cal reports, funding plans, and special requests, as needed. Act as liaison for the Budget Policy and Development Section and collaborate with program and administrative staff, including management across various CARB units, to reconcile legacy system data, review FI\$Cal reports, coordinate funding plans, and address special requests as needed
20%	Special Funds and Fiscal Coordination Evaluate and monitor the status of special funds administered by CARB by preparing and analyzing Fund Condition Statements (FCS). Coordinate with Budget Monitoring and Management Section staff to incorporate revised revenue estimates and input actual prior-year and projected future expenditures to ensure accurate fund balances. Confirm funding sources for BCPs by analyzing their fiscal impact on the FCS and consulting with Fund Coordinators. Provide recommendations and solutions to address potential fund insolvency issues.

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% of Time	Marginal Functions
10%	Special Projects and Backup Support Develop budget tracking tools and complete special projects and assignments as needed. Perform other duties as required.

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 the frequent use of standard office equipment, including 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.

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:
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