

**DUTY STATEMENT**

|                                                                                                       |                                                                                 |
|-------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------|
| Employee Name:                                                                                        | Position Number:<br><b>580-480-5402-001</b>                                     |
| Classification:<br>Analyst III                                                                        | Tenure/Time Base:<br>Permanent/Full-Time                                        |
| Working Title:<br>Fiscal Specialist                                                                   | Work Location:<br>1616 Capitol Avenue, Sacramento CA 95814                      |
| Collective Bargaining Unit:<br>R01                                                                    | Position Eligible for Telework (Yes/No):<br>Yes                                 |
| Center/Office/Division:<br>Center for Infectious Diseases/Division of<br>Communicable Disease Control | Branch/Section/Unit:<br>Public Health Reportable Information<br>Exchange Branch |

All employees shall possess the general qualifications, as described in California Code of Regulations Title 2, Section 172, which include, but are not limited to integrity, honesty, dependability, thoroughness, accuracy, good judgment, initiative, resourcefulness, and the ability to work cooperatively with others.

This position requires the incumbent to maintain consistent and regular attendance; communicate effectively (orally and in writing) in dealing with the public and/or other employees; develop and maintain knowledge and skill related to specific tasks, methodologies, tools, and equipment; complete assignments in a timely and efficient manner; and, adhere to departmental policies and procedures.

All California Department of Public Health (CDPH) employees perform work that is of the utmost importance, where each employee is important in supporting and promoting an environment of equity, diversity, and inclusiveness, essential to the delivery of the department's mission. All employees are valued and should understand that their contributions and the contributions of their team members derive from different cultures, backgrounds, and life experiences, supporting innovations in public health services and programs for California.

**Competencies**

The competencies required for this position are found on the classification specification for the classification noted above. Classification specifications are located on the [California Department of Human Resource's Job Descriptions webpage](#).

**Job Summary**

This position supports the California Department of Public Health's (CDPH) mission and strategic plan by serving a critical role in ensuring the fiscal integrity and operational efficiency of the Public Health Reportable Information Branch (PRIME).

The Analyst III serves as a highly skilled specialist who independently carries out complex fiscal and budgetary analysis for the PRIME Branch. The incumbent oversees program expenditure planning, maintains advanced budget tracking systems, coordinates fiscal training to support Branch operations, and provides expert fiscal oversight of data system-related contracts. This role contributes to fiscal strategy, ensures compliance with statewide and departmental requirements, and may require overtime without advance notice or participation in after-hour conference calls to support critical Department, Center and Division fiscal drills.

The incumbent works under the general direction of the Supervisor II, Assistant Branch Chief of the PRIME Branch.

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**Special Requirements**

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- ☒ Conflict of Interest (COI)
- ☐ Background Check and/or Fingerprinting Clearance
- ☐ Medical Clearance
- ☒ Travel: Up to 5% in state to attend in-person meetings.
- ☐ Bilingual: Pass a State written and/or verbal proficiency exam in
- ☐ License/Certification:
- ☐ Other:

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**Essential Functions (including percentage of time)**

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- 30% Independently oversees and manages complex fiscal and budgetary functions for the PRIME Branch, including the development, review, and timely completion of Departmental, Center, and Division drills. Manages five or more complex budgets and applies expert knowledge of program specific fiscal issues, forecasting, and operational processes. Independently leads expenditure planning and tracking, evaluates program expenditures against approved budgets, and develops annual and multi-year budgets across all PRIME funding sources. Provides authoritative fiscal guidance, policy recommendations, and analytical findings to the Assistant Branch Chief (ABC), Branch Chief (BC), and Division Office management. Represents program fiscal needs in strategic planning, offering expert analysis on program development, staffing considerations, resource allocation, and operational evaluation. Serves as the primary fiscal liaison between the Division Office, CDPH Accounting, and CDPH Budgets, ensuring clear communication of program needs and timely resolution to high-level programmatic and fiscal issues.
- 20% Provides expert fiscal oversight for PRIME's infectious disease data system contracts. Independently conducts and participates in meetings and teleconferences with CDPH staff, management, and vendor representatives to plan, implement, and monitor contract expenditures, ensuring full budgetary and contractual compliance. Advises management on contract financial status, emerging issues, and recommended solutions. Supports the contract cycle by participating in proposal reviews, scoring processes, negotiations, and approval of funded projects as requested by the ABC, BC, and Division Office.
- 20% Leads the development, drafting, coordination, and analytical review of Budget Change Proposals, Spring Finance Letters, Approved Process Documents, and proposed legislation for PRIME, in collaboration with the Division Office. Ensures all fiscal documentation align with statewide fiscal policy, program objective, and statutory requirements. Provides analytical support to the Division Office and Branch leadership throughout the state budget process.
- 15% Designs, develops, and presents routine and ad-hoc fiscal evaluation reports to Branch leadership to inform strategic decisions and effective oversight of program funds. Conducts complex fiscal analysis and identifies training needs related to fiscal operations, budgeting, forecasting, and accounting best practices. Delivers training and provides procedural and

strategic recommendations to the ABC, BC, and Division Office regarding PRIME's fiscal processes.

- 10% Manages PRIME procurement activities, including development of Requests for Proposals (RFPs), Requests for Applications (RPAs), and the development of technical assistance guidance. Ensures acquisition processes meet program requirements and departmental and statewide policies.

### **Marginal Functions (including percentage of time)**

- 5% Serve on multi-disciplinary workgroups and teams as a fiscal subject matter expert. Perform other Analyst III duties and participate in special projects as needed.

☐ I certify this duty statement represents an accurate description of the essential functions of this position. I have discussed the duties and have provided a copy of this duty statement to the employee named above.

☐ I have read and understand the duties and requirements listed above and am able to perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation may be necessary, or if unsure of a need for reasonable accommodation, inform the hiring supervisor.)

|                        |      |                      |      |
|------------------------|------|----------------------|------|
| Supervisor's Name:     | Date | Employee's Name:     | Date |
| Supervisor's Signature | Date | Employee's Signature | Date |

### **HRD Use Only:**

Approved By: TY

Date: 7/9/26