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**Position Details****Classification:**

Analyst II

**Office:**

Financial

**Working Title:**

Analyst II

**Location:**

Sacramento

**Position Number:**

311-340-5393-801

**HR Approval Date/Initials:**

10/01/2026 MP

**CBID/Bargaining  
Unit:** R01**Work Week  
Group:** 2**Tenure:**  
Permanent**Time Base:**  
Full-time**Job Description Summary**

Under direction, the Analyst II independently researches, analyzes, and makes recommendations on complex financial and performance reports. The incumbent leads collaborative efforts to close data gaps, update tracking matrices, and improve collection methods to ensure compliance with program requirements. Additionally, they take the lead on multi-disciplinary projects and managerial issues to enhance the quality of final authority documentation. Conducts rigorous analytical studies to formulate actionable procedures, program alternatives, and operational policies. Validates data integrity, performs comprehensive program evaluations, and diagnoses complex issues. Additionally, the incumbent will prepare, review, and monitor Finance and Audit Committee reports, monthly and ad hoc reports, and coordinate materials for meetings with Executive Management, the Authority Board, staff, and stakeholders.

**Duties**

Percentage

Essential (E)/Marginal (M)

**35% (E) Financial & Performance Reporting Leadership**

- Independently prepares and reviews complex financial and performance reports to ensure absolute data accuracy, transparency, and regulatory compliance.
- Leads cross-departmental collaboration to synthesize high-level statistical and financial data from disparate sources into cohesive organizational materials.
- Evaluates and validates data integrity, tracking metrics, and complex calculations within reports submitted by branch-level producers.

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- Conducts advanced gap analysis across multiple data streams to identify and resolve systemic data discrepancies and reporting issues.
- Consults with branch-level producers to analyze workflows, document critical data elements, and engineer strategic process improvements.

25% (E)     **Data Operations, Systems Analysis, & Quality Control**

- Analyzes and monitors daily performance data for branch-level workloads, diagnosing the root causes of processing delays and engineering operational solutions for management.
- Oversees data extraction and data-cleaning protocols for complex financial logs, transforming raw data into actionable business intelligence.
- Develops and implements data validation procedures to isolate recurring irregularities and independently authorize database updates.
- Conducts comprehensive reconciliations and variance assessments on large, multi-disciplinary datasets.
- Partners with branch leadership to restructure tracking logs and adapt reporting architectures to changing programmatic needs.

25% (E)     **Fiscal Administration, Project Coordination, & Process Improvement**

- Manages contract invoice compliance reviews, audit expenditure trends, and execute advanced data analysis to support strategic budgetary planning.
- Leads the design and rollout of operational process improvements, advanced tracking systems, and modernized reporting techniques.
- Serves as a team lead to coordinate interdisciplinary projects involving multiple governmental units and external stakeholders.

10% (E)     **Economic Analysis, Policy Formulation, & Training**

- Formulates economic and business reports, independently researching and interpreting complex variables to advise senior management.
- Drafts, evaluates, and establishes formalized policies, operational procedures, and internal tracking controls.
- Designs and maintains comprehensive desk manuals, standard guidelines, and technical electronic job aids.
- Designs, implements, and conducts training programs for staff on updated reporting requirements and data collection techniques.

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- Resolve complex ad-hoc analytical requests and serve as a subject matter generalist for the branch.

5% (M)

- Other job-related duties as required.

### **Special Requirements**

The checked boxes below indicate any additional requirements of this position.

|                                                                                            |                                                                                                      |                                                                                              |                                                                                            |                                                                                            |
|--------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|
| License<br>Required<br>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | Conflict of<br>Interest (COI)<br>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | Bilingual<br>Required<br>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | Contract<br>Manager<br>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> | Medical<br>Required<br>Yes <input type="checkbox"/> No <input checked="" type="checkbox"/> |
| Type:                                                                                      |                                                                                                      | Language:                                                                                    |                                                                                            |                                                                                            |

Other Special Requirements Information: N/A

### **Knowledge and Abilities**

Knowledge of: Principles, practices, and trends of public and business administration, management, supportive staff services, and governmental functions and organization, and methods and techniques of effective communication and leadership.

Ability to: 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**

- Experience with financial and/or performance reporting.
- Experience presenting analytical information verbally and in writing to a variety of audiences.
- Skilled in performing accurate data entry, conducting analytical reviews, and validating data integrity.
- Experience creating and analyzing data sets and dashboards utilizing Power BI, Power Query or similar tools and/or software.
- Experience evaluating and conducting research regarding invoices and expenditure data.
- Experience reviewing contract billing, conducting expenditure data analysis, expenditure and budget tracking, and comprehensive research.
- Experience identifying data gaps, suggesting process improvements, developing analytical tools, and refining reporting methods.
- Proficient with the Microsoft Office suite. (Word, Outlook, PowerPoint, Visio, etc.)

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- High level of proficiency with complex formulas, pivot tables, charts, graphs, and queries in MS Excel.
- Experience working cooperatively and collaboratively in a team setting, with stakeholders, governmental agencies, and the public.
- Excellent attendance.
- Excellent written and verbal communication skills

### **Supervision Exercised Over Others**

This position does not supervise but may act as a lead.

### **Public and Internal Contacts**

The incumbent will have regular contact with various levels of staff at the Authority, consultants, vendors, contractors, staff at other state agencies, and the public. Employees must handle all situations and communications tactfully and respectfully to support the Authority's mission.

### **Responsibility for Decisions and Consequence of Error**

Assigned duties require the exercise of judgement or choice among possible actions, sometimes without clear precedents and with concern for the consequences of the action. Errors in judgment or failure to carry out the responsibilities of this position could place the Authority in violation of state and federal requirements, which could negatively impact the Authority. The incumbent must exercise good judgment and make effective decisions to fulfill the position's responsibilities.

### **Physical and Environmental Demands**

While working on-site, the incumbent works in a professional office environment, in a climate-controlled area which may fluctuate in temperature and is under artificial light. The incumbent will be required to use a computer, mouse, and keyboard, and will be required to sit for long periods of time at a computer screen. Employee must be able to focus for long periods of time, manage multiple tasks, adapt to changes in priorities, and complete tasks or projects with short notice. Employee must develop and maintain cooperative working relationships and display professionalism and respect for others in all contact opportunities.

### **Working Conditions and Requirements**

- Schedule: A set schedule of Monday-Friday, 8:30am-5:00pm is required for this position.
- Telework: Part-time telework is available for this position for California residents based on the requirements of the position.
- Travel: N/A
- Other: N/A

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**Acknowledgment and Signatures**

I have read and understand the duties listed above and can perform them with/without reasonable accommodation (RA). (If you believe you may require RA, please discuss this with the hiring supervisor. If you are unsure whether you require reasonable accommodation, inform the hiring supervisor who will discuss your concerns with the RA Coordinator.)

|                         |            |       |
|-------------------------|------------|-------|
| Incumbent Printed Name: | Signature: | Date: |
|                         |            |       |

I have discussed the duties with and provided a copy of this duty statement to the incumbent named above.

|                          |            |       |
|--------------------------|------------|-------|
| Supervisor Printed Name: | Signature: | Date: |
|                          |            |       |

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