State of California Department of Insurance
ESSENTIAL FUNCTION DUTY STATEMENT
HRM-0025

Classification Title Analyst I	**Branch/Division/Bureau** Administration and Licensing Services Branch/ Financial & Business Management Division/ Budget and Revenue Management Bureau
Working Title Budget Analyst	**Office/Unit /Section/Geographic Location** Expenditure/Sacramento
Position Number (13 Digit) 413-195-5157-XXX	**Conflict of Interest Position:** ☑ **NO** ☐ **YES**
Employee Name	**Effective Date**

BASIC FUNCTION: Under the supervision of the Assistant Chief Budget Officer – Expenditures, Supervisor II, the Analyst I will perform analytical work of average difficulty in the Financial and Business Management Division – Budget and Revenue Management Bureau (FBMD-BRMB). The incumbent will be responsible for assisting in the preparation, development, and control of the departmental budget.

ESSENTIAL FUNCTIONS

35% Monitor and track the status of authorized position, revenues and expenditures on a monthly basis. Assist Branches with developing alternatives for unanticipated funding issues. Review, analyze, and evaluate the department's annual authorized expenditure and revenue budget, including the preparation of baseline budgets. Closely monitor and track program allotments and expenditures. Assist Branches with developing alternatives for unanticipated funding issues. Assist with administratively controlling established positions and blanket funds (temporary help and overtime) that are in use in the Department.

35% Read, analyze, and complete Budget Letter drills issued by the Department of Finance. Review, analyze, and evaluate program budget change proposals (BCPs). Assists in making recommendations for actions pertaining to BCPs. Duties related to facilitating the analysis of expenditures and/or revenues for assigned Branches, which includes providing guidance to Branch fiscal liaisons staff in the application of projection methodologies. Assists in the preparation of in-depth analysis of expenditure and/ or revenues projections prepared by Branch staff. Identify for departmental management the budgetary savings or deficits displayed in the analysis of expenditures. Develop and present to management recommendations on the resolution or use of these deficits or savings. Identify and resolve, in conjunction with Branch and FBMD-Accounting Services Bureau, questions and problems regarding revenues/expenditures displayed in FI$Cal. Reviews the fiscal impact of eRPAs (electronic Request for Personnel Action). Further support respective Branch assignments through the computation, allocation, and monitoring of salaries, benefits, and operating expenses and equipment expenditures.

25% Provide budget information, instructions, and technical assistance for Branch staff, Division Chiefs, and Deputy Commissioners as required. Evaluate and prepare recommendations relating to subjects raised through issue memos. Establish and maintain cooperative working relationships with Department staff. Update procedure manuals, miscellaneous filings and distribution of reports.

MARGINAL FUNCTIONS

5% Prepare fiscal analysis to determine the impact of legislation and regulations affecting the department.

WORK ENVIRONMENT OR PHYSICAL ABILITIES

- The incumbent must be able to work in a high rise building.
- May be required to work overtime with limited notice.
- Ability to lift 5-10 pounds without a reasonable accommodation.
- Ability to work in a shared internal office space.
- The incumbent may telework in accordance with CDI's Telework Policy. Teleworking employees may be required to report to their headquarters office location on designated telework days. Travel expenses are not reimbursed; however other authorized transit subsidies do exist for those who qualify.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety Analyst.)

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Employee Signature Date

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Printed Name

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

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Supervisor Signature Date

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Printed Name

Classification Title Analyst II	**Branch/Division/Bureau** Administration and Licensing Services Branch/ Financial & Business Management Division/ Budget and Revenue Management Bureau
Working Title Budget Analyst	**Office/Unit /Section/Geographic Location** Expenditure/SACRAMENTO
Position Number (13 Digit) 413-195-5393-016	**Conflict of Interest Position:** ☑ **NO** ☐ **YES**
Employee Name	**Effective Date**

BASIC FUNCTION:

Under direction of the Assistant Chief Budget Officer – Expenditure Section (Supervisor II), the Analyst II in the Financial and Business Management Division – Budget and Revenue Management Bureau (FBMD-BRMB) will independently perform the more complex tasks associated with the development, preparation, maintenance, review and control of the department's annual budget. In addition, the incumbent will provide consultative budget services to management and program staff.

ESSENTIAL FUNCTIONS:

40% Monitors and tracks the status of authorized positions, expenditures and revenues monthly. Assists branches with developing alternatives for unanticipated funding issues. Reviews, analyzes, and completes Budget Letter drills issued by the Department of Finance (DOF). Responsible for preparation of the department's annual budget, for both expenditures and revenues, and all related schedules, including interpretation and application of all pertinent State Administrative Manual sections and externally imposed budget mandates and directives; develops and maintains various required budget schedules and galley.

30% Reviews Budget Change Proposals (BCPs) for conformity with the department's and the state's policies and procedures, as well as those established by the DOF; analyzes BCPs to ensure proper and sufficient justification is provided to support requests. Facilitates the quarterly analysis of expenditures and/or revenues for assigned programs, which includes providing guidance to branch fiscal liaison staff in the application of projection methodologies. Assists in the preparation of in-depth analysis of expenditure and/or revenues projections prepared by Branch

staff. Identifies the budgetary savings or deficits displayed in the analysis of expenditures for departmental management. Develops and presents recommendations to management on the resolution or use of deficits or savings. Identifies and resolves, in conjunction with branch and FBMD-Accounting Services Bureau, questions and problems regarding revenues/expenditures displayed in FI$Cal. Reviews the fiscal impact of Electronic Request for Personnel Action (eRPA). Supports respective branch assignments through the computation, allocation, and monitoring of salaries, benefits, and operating expenses and equipment expenditures. Prepares and monitors the Fund Condition and various Rate Developments, including preparing the hourly rates for several of the department's reimbursement billing functions; monitoring of the department's various revenue sources; reviewing BCPs to identify the revenue source and analyzing the reasonableness of any additional revenue estimated in support of the proposal.

15% Monitors the department's approved budget and proposes changes to the Supervisor II to align with departmental needs. Supports respective program assignments through computation, allocation, and monitoring of salary, benefits, salary savings, and operating expenses. Responds to requests for technical information regarding the budget development process; performs special tasks and projects at the request of executive staff as they relate to the financial impact on the department.

10% Regularly reconciles departmental appropriations by sources of funding. Evaluates, gathers and prepares recommendations relating to subjects raised through issue memos or special requests. Prepares and processes Transfers of Budget Allotments. Updates working files as appropriate for changes to payroll headers. Establishes and maintains cooperative working relationships with the DOF, Legislative Analyst, and department staff (program, personnel, accounting, fiscal systems, and contracts).

MARGINAL FUNCTIONS:

5% Prepares and coordinates with Branches/Programs regarding fiscal analysis' prepared by staff to determine the impact of legislation and regulations affecting the department.

WORK ENVIRONMENT OR PHYSICAL ABILITIES

- Incumbent must be able to work in a high-rise office building.
- Incumbent may be required to work overtime with limited notice to complete assignments.
- The incumbent may telework in accordance with CDI's Telework Policy. Teleworking employees may be required to report to their headquarters office location on designated telework days. Travel expenses are not reimbursed, however other authorized transit subsidies do exist for those who qualify.

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the Health & Safety Analyst.)

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Employee Signature Date

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Printed Name

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

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Supervisor Signature Date

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Printed Name