# California Department of Tax and Fee Administration
## DUTY STATEMENT

☐ CURRENT
☒ PROPOSED

| | | | |
|---|---|---|---|
| SCHEDULE TO BE WORKED/WORKING HOURS | | EFFECTIVE DATE | |
| CIVIL SERVICE CLASSIFICATION<br>**Analyst I** | | WORKING TITLE<br>**Operations Analyst** | |
| DIVISION/OFFICE/UNIT<br>**FOD/Admin** | | SPECIFIC LOCATION ASSIGNED TO<br>Sacramento, CA | |
| SEERA DESIGNATION<br>**Rank and File** | BARGAINING UNIT<br>**R01** | WORK WEEK GROUP<br>**2** | CERTIFICATES REQUIRED<br>**None** |
| FINGERPRINTS/BACKGROUND CHECK REQUIRED<br>☒ Yes ☐ No | BILINGUAL POSITION<br>☐ Yes ☒ No | SUPERVISION EXERCISED<br>**None** | |
| INCUMBENT | | POSITION NUMBER *(Agency-Unit-Class-Serial)*<br>**291 - 440 - 5157 - xxx** | |

*The mission of the California Department of Tax and Fee Administration is to make life better for Californians by fairly and efficiently collecting the revenue that supports our essential public services.*

POSITION'S ORGANIZATIONAL SETTING AND MAJOR FUNCTIONS

Under the supervision of the Business Taxes Administrator (BTA) III, Operations Administrator (Administrator), the Analyst I works independently to perform a variety of administrative and analytical duties related to the Field Operation Division's administration and assists, advises, and relieves the Administrator of administrative detail. The incumbent prepares analyses and recommendations for the Administrator, Deputy Director, Assistant Deputy Directors, and other managers, covering policy formulation and administrative actions. The Analyst serves as a liaison to all offices within FOD and collaborates with stakeholders on FOD matters to promote uniformity, compliance, and a proactive approach to department and division policies and procedures. The analyst develops materials to assist, guide, and support field offices and other stakeholders, and performs research, tracks, and reports on specific metrics. The incumbent will be required to perform these duties independently. Travel may be required for up to 5% of the time, including overnight.

**Candidate must be able to perform the following essential job functions with or without reasonable accommodation.**

| PERCENTAGE OF TIME SPENT | DUTIES |
|---|---|
| 45% | **ESSENTIAL JOB FUNCTIONS**<br><br>**Provide operational and administrative support across all FOD bureaus and field offices**.<br><br>Maintains and updates FOD documents, webpages, manuals, and training resources. Ensures field offices meet FOD administrative deadlines, coordinates statewide efforts, and supports the division's operational continuity by analyzing data, solving the less complex problems, and facilitating communication across bureaus, field offices, and headquarters units.<br><br>Performs analytical, administrative, and operational functions for the Field Operations Division (FOD), serves as FOD's Position Coordinator and Personnel Liaison. Oversees position control activities, including but not limited to tracking vacancies, reconciling HR reports, preparing hiring and blanket position requests, reviewing justification memos, updating organizational charts, and resolving personnel-related discrepancies. Develops and maintains recruitment materials and other required documents to support division-wide staffing needs.<br><br>Works closely with the Analyst II, Accounting, Budget, and Acquisitions to manage the Operating Expense and Equipment (OE&E) budget process, perform expenditure review and analysis, evaluate fiscal impacts, and ensure accurate coding and compliance. Acts as the division's contract coordinator, preparing, analyzing, and approving new, renewal, and amended contract requests, managing T&M expenditures, reviewing and reconciling invoices, and processing FI$Cal receipts. Acts as the division's procurement coordinator by supporting field staff with BAS requests, requisitions, and procurement-related questions. In addition, assists and/or trains with asset management, fleet needs, facility issues, and other operational tasks as required. |

| | |
|---|---|
| 30% | **Provides operational and administrative support to the Administration and Operations team.**<br><br>Conducts analytical work and completes staff work products for supervisor review, including research, data gathering, evaluation, and recommendations related to FOD operations. Produces management summaries, analytical reports, dashboards, charts, and fiscal or operational assessments. Identifies issues, evaluates alternatives, and proposes solutions to improve division-wide processes, policies, and efficiencies. Serves as a resource to leadership and team members by interpreting policies, developing procedures, updating process documentation, and providing clear guidance on administrative and operational requirements. Communicates clearly and effectively with FOD staff across all levels and partnering divisions to support division operations. |
| 20% | Prepares correspondence, reports, and background materials for the Supervisor, ensuring accuracy, completeness, and alignment with departmental policy. Develops procedures and workflows for division programs, ensuring clarity, accountability, and consistent execution across all field offices. Represents FOD in division-wide initiatives and special projects, delivering completed staff work and presenting well-supported recommendations to management. |
| | **MARGINAL JOB FUNCTIONS** |
| 5% | Perform other job-related duties as required. |

**WORK ENVIRONMENT OR PHYSICAL ABILITIES REQUIRED FOR THE JOB** *(if applicable)*:

**Work Environment:**

- May work in a high-rise building
- Standard office environment

**Physical Abilities:**

- Remain in a stationary position for extended periods of time to meet operational needs and critical deadlines.
- Use a computer/laptop, office equipment, and telephone daily.
- Ability to transfer and transport materials, supplies, and equipment weighing up to thirty (30) pounds with or without reasonable accommodation.

**Additional Requirements/Expectations:**

- Travel may be required to meet training requirements, which may include overnight.
- Must be flexible and willing to adjust to changing work schedules, if required, for operational needs.
- Must be present and available to perform duties as required to meet the operational needs of FOD

***I have read this duty statement and fully understand that I must perform the Essential Job Functions of my position with or without reasonable accommodation.***

| PRINT EMPLOYEE NAME | EMPLOYEE'S SIGNATURE | DATE |
|---|---|---|
| | | |

***I certify that the above accurately represents the duties of the position and that I have reviewed these duties with the above-named employee.***

| PRINT SUPERVISOR NAME | SUPERVISOR'S SIGNATURE | DATE |
|---|---|---|
| | | |

| | |
|---|---|
| **HRB Approval Date: 5/15/2026** | **C&P Analyst Initials: JV** |