California Department of Tax and Fee Administration

DUTY STATEMENT

☐ CURRENT
☐ PROPOSED

SCHEDULE TO BE WORKED/WORKING HOURS		EFFECTIVE DATE	
CIVIL SERVICE CLASSIFICATION		WORKING TITLE	
Manager II		**Budget Officer**	
DIVISION/OFFICE/UNIT		SPECIFIC LOCATION ASSIGNED TO	
Financial Management Division/Budget Branch		**Sacramento, CA - Headquarters Office**	
SEERA DESIGNATION	BARGAINING UNIT	WORK WEEK GROUP	CERTIFICATES REQUIRED
Managerial	**01**	**E**	**None**
FINGERPRINTS/BACKGROUND CHECK REQUIRED	BILINGUAL POSITION	SUPERVISION EXERCISED	
☒ Yes ☐ No	☐ Yes ☒ No	**Yes**	
INCUMBENT		POSITION NUMBER *(Agency-Unit-Class-Serial)*	
		291-365-4802-003	

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 administrative direction of the Controller (Career Executive Assignment [CEA], Level A), Financial Management Division, the Budget Officer (Manager II) is responsible for the overall administration of the California Department of Tax and Fee Administration (CDTFA)'s and Board of Equalization (BOE)'s budget and serves as the technical budget advisor to the Director and Executive staff. Responsibilities and duties include but are not limited to: (1) managing the CDTFA's extremely complex and sensitive budget which includes over 40+ tax and fee programs with a projected operating budget in excess of $700 million and revenue collection in excess of $100 billion; and (2) formulating and/or implementing the CDTFA's Financial Information System of California (FI$Cal) polices, plan, and processes. This work is done through planning, organizing, leading and controlling the activities of the Budget Branch. The Budget Officer also serves as the Board of Equalization (BOE) Budget Officer and will be responsible for the development, preparation, administration, and maintenance of the BOE's budget. The CDTFA Budget Officer provides consultative budget service to the BOE Executive Director, or designee, and will monitor expenditures, reimbursements, cash flow, and other budget related areas. CDTFA Budget Officer manages BOE's budget revisions, evaluate and process budget change proposal (BCP's); reconcile appropriation by source of funding and prepare and process transfer of budget allotments. The Budget Officer will work closely with staff at the Department of Finance, Legislative Analyst's Office, Legislative staff, and other state agencies' staff in carrying out these duties.

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

PERCENTAGE OF TIME SPENT	DUTIES
30%	**ESSENTIAL JOB FUNCTIONS** Provides leadership, administrative, and managerial direction for the establishment of and any changes to the CDTFA's and BOE's annual budget. Manages the annual budget change process in line with the Department of Finance (DOF) and Legislative budget cycle. Lead and coordinate development of CDTFA's and BOE's Budget Change Proposals (BCP) through CDTFA, DOF, and Legislative approval processes. Direct internal coordination of priority BCPs with CDTFA Divisions' representatives aligned to the CDTFA Strategic, Business, and IT Plans.
30%	Directs the overall development and administration of a large, complex departmental budget projected to be in excess of $700 million. Ensures the annual budget is completed accurately, thoroughly, and according to governmental practices and procedures; that organization budget allocations are done timely and consistent with approved Governor's Budget and CDTFA priorities; and that staff resources, systems, tools and procedures are in place to ensure timely and accurate monitoring of the budget allocations. Advises management on budgetary policy; interprets and applies Budget Act control language, DOF budget instructions and policies; consults with, advises and makes recommendations to the CDTFA management team regarding budget policies, programs and procedures.
15%	Directs the development and implementation of fiscal-related budget policies and procedures for the CDTFA through coordination and input of stakeholder departments and other administrative offices, and the

	Legislative and Research Division. Establishes appropriate standards, internal controls, and procedures for all CDTFA budget activities to ensure timely and accurate monitoring and ensures timely maintenance and modifications to budget systems and tools to provide critical budget data needed to meet the State's reporting requirements as well as the CDTFA's mission and goals.
10%	Serves as a FI$Cal expert for CDTFA management on all aspects of the CDTFA's budget. Works with CDTFA management regarding budget issues; and represents CDTFA with other governmental agencies and private industry.
10%	May lead special and sensitive projects, responsible for and directing the review, analysis, and preparation of special reports and budget documents for the most sensitive and complex issues.
5%	**MARGINAL JOB FUNCTIONS** Acts as the Controller, Accounting and Budgeting Bureau, in their absence. Perform other duties as assigned.

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

Work Environment:

- Office setting with artificial light and temperature control.
- Position may be located in a high-rise building.

Physical Abilities:

- Daily access and use of a personal computer, office equipment and telephone is essential.
- Frequent use of an elevator and/or the ability to ascend/descend stairs up to eight (8) stories.
- Ability to remain in a stationary position consistent with office work.

Additional Requirements/Expectations:

- May be required to work occasional overtime.
- Required to work mandatory overtime during Fiscal Year End.

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: 11/16/2026	**C&P Analyst Initials: EH**