DEPARTMENT OF DEVELOPMENTAL SERVICES
OPERATIONS
FINANCIAL MANAGEMENT DIVISION
FISCAL FORECASTING BRANCH
ESTIMATES SECTION

DUTY STATEMENT

JOB TITLE: Analyst II **POSITION #:** 472-530-5393-003

WORKING TITLE: **EMPLOYEE:**

POSITION DESCRIPTION: Under direction of Supervisor I of the Estimates Unit, the Analyst II performs full journey level analytical work developing and explaining complex fiscal estimates relating for regional center community services for people with developmental disabilities and their families.

SUPERVISION EXERCISED: None.

SUPERVISION RECEIVED: Reports to, and under direction of, the Supervisor I of the Estimates Unit

EXAMPLES OF DUTIES:

Essential Job Functions:

30% Plans and designs analytical approaches and estimate methodologies and interprets data to calculate various estimates for the Regional Center Local Assistance budget and other fiscal analyses related to assigned program areas. Uses statistical and estimating models, confers with program staff, prepares structured, written descriptions of the Regional Center estimates, and meets with upper management and control agency staff to explain estimates. Incorporates estimates into the Department's budget development process.

30% Gathers, compiles, edits, and interprets consumer caseload and expenditure data from various sources related to assigned program areas. Uses this data to identify the fiscal impact of future program changes. Contributes to policy development by projecting expenditures and identifying key data indicators. Develop fiscal analyses in response to requests from the Legislature, the Department of Finance, the California Health and Human Services Agency, and interested partners. Drafts written summaries and responses include but not limited to spreadsheets and Word document formats, to explain cost estimates and provide recommendations and backup data for management review when appropriate.

20% Reviews and analyzes legislation, regulations, and policy initiatives independently to assess the relative caseload and fiscal impacts on assigned programs. This includes problem exploration and definition, conferring with program staff as necessary to understand the impacts of the proposal on State and/or regional center operations as well as program recipients, developing estimating methodologies, extracting information from various data sources to develop assumptions, calculating the associated fiscal impacts, and preparing structured, professional written reports of the fiscal analyses.

10% Develops and maintains selected data sets and time series, such as costs for specific services or provider types, average cost per consumer and/or service, and analyses of expenditures and / or consumer utilization trends, from various internal data sources. Analyzes the data to determine reasons for fluctuations. Maintain procedures, data report files, back-up documentation, and technical notes associated with assigned estimates and subject areas.

Marginal Job Functions:

10% Participates in meetings with program and fiscal staff, legislative coordinators, and interested parties. This includes scheduling meetings, preparing agendas, developing and editing briefing documents, and presenting information to technical and executive level audiences. Performs other duties as assigned within the scope of the classification.

WORKING CONDITIONS: Work in open-spaced, partitioned office environment. The position may require working irregular hours during peak workload periods. This position is a hybrid, in-office/telework position, and may be subject to change. Incumbent can be required to report to the office, or any designated location at any time. Telework agreements can be modified and/or cancelled at any time.

DESIRABLE QUALIFICATIONS:

Knowledge of: Methods of gathering and analyzing large, complex data; the State developmental disabilities programs; proficiency in software programs Microsoft Excel, PowerPoint, SharePoint, Teams, Visio, Word, PowerBI, Snowflake, Adobe Acrobat, including PDF accessibility rules and requirements; statistical methods.

Ability to: Conduct thorough research; meet and manage multiple priorities and deadlines; interpret and apply laws, rules, and regulations; communicate effectively and professionally; use good judgment in decision-making; exercise creativity and flexibility in problem identification and resolution; manage time and resources efficiently and effectively; adapt to changing priorities while maintaining a customer service focus.

CERTIFICATION OR LICENSE: None.

Employee Name (Print)	Employee Signature	Date
Supervisor Name (Print)	Supervisor Signature	Date

Employee and Supervisor acknowledge that by signing this Duty Statement that they have discussed and agree to the expectations of the position.

DEPARTMENT OF DEVELOPMENTAL SERVICES
OPERATIONS
FINANCIAL MANAGEMENT DIVISION
FISCAL FORECASTING BRANCH
ESTIMATES SECTION

DUTY STATEMENT

JOB TITLE: Analyst I **POSITION #:** 472-530-5157-XXX

WORKING TITLE: **EMPLOYEE:**

POSITION DESCRIPTION: Under supervision of Supervisor I of the Estimates Unit, the Analyst I performs a variety of analytical and technical assignments in a learning and developmental capacity to support the development of fiscal estimates relating to regional center community services for individuals with developmental disabilities and their families. The incumbent assists in gathering, compiling, analyzing, and interpreting fiscal and caseload data; preparing preliminary estimates; conducting research; and developing reports and recommendations to support budget development, forecasting, legislative analyses, and fiscal policy activities.

SUPERVISION EXERCISED: None.

SUPERVISION RECEIVED: Reports to, and under supervision of, the Supervisor I of the Estimates Unit.

EXAMPLES OF DUTIES:

Essential Job Functions:

30% Assists in the development of fiscal estimates and budget projections for the Regional Center Local Assistance budget and assigned program areas. Gathers data from internal and external sources, performs basic statistical and fiscal analyses, reviews estimate assumptions, and prepares draft calculations and supporting documentation. Assists higher level analysts in maintaining estimate models and forecasting methodologies. Learns and applies estimating techniques and budget development processes.

25% Compiles, reconciles, validates, and analyzes consumer caseload, expenditure, and program utilization data from various reporting systems and databases. Identifies trends, discrepancies, and significant variances in fiscal and caseload information and prepares summaries for management review. Assists in developing reports, spreadsheets, charts, and other analytical products used in budget forecasting and fiscal monitoring activities.

20% Researches legislation, regulations, budget proposals, and policy initiatives affecting developmental services programs. Assists in evaluating potential fiscal and caseload impacts by gathering supporting information, reviewing historical data, and documenting assumptions. Prepares draft analyses, issue summaries, and support materials for review by higher level analysts and management.

15% Assists in responding to requests for fiscal information from Department management, the Legislature, the Department of Finance, the California Health and Human Services Agency, regional centers, and interested parties. Prepares draft correspondence, spreadsheets, briefing materials, and written summaries explaining fiscal estimates, expenditure trends, and program impacts. Maintain supporting documentation for assigned estimates and analyses.

Marginal Job Functions:

10% Maintains estimate workpapers, data files, procedures, technical documentation, and recurring reports related to assigned workload. Assists with updating trend analyses and supporting data used for forecasting and fiscal monitoring. Participates in meetings, workgroups, and training sessions; assists in preparing briefing materials and presenting analytical information as appropriate. Contributes to efforts that improve data quality, reporting processes, and analytical efficiencies. Performs other duties as assigned consistently with the classification.

WORKING CONDITIONS: Work is performed in an open-spaced, partitioned office environment. The position may require working irregular hours during peak workload periods. This position is a hybrid, in-office/telework position, and may be subject to change. Incumbent can be required to report to the office, or any designated location at any time. Telework agreements can be modified and/or cancelled at any time.

DESIRABLE QUALIFICATIONS:

Knowledge of: Basic principles of fiscal analysis, budgeting, forecasting, and statistical analysis; research and analytical techniques; Microsoft Office Suite, including Excel, Word, PowerPoint, Teams, and SharePoint; basic data analysis and reporting tools such as Power BI; principles of public administration and governmental budgeting; the State budget process and developmental services programs.

Ability to: Gather and analyze data from multiple sources; learn and apply fiscal estimating methodologies and analytical techniques; interpret laws, regulations, policies, and procedures; prepare clear, accurate reports and correspondence; communicate effectively; establish positive working relationships; manage multiple priorities and deadlines; exercise sound judgment and attention to detail; effectively learn and utilize new software applications.

CERTIFICATION OR LICENSE: None.

Employee Name (Print)	Employee Signature	Date

Supervisor Name (Print)	Supervisor Signature	Date

Employee and Supervisor acknowledge that by signing this Duty Statement that they have discussed and agree to the expectations of the position.