

**Department of Consumer Affairs**

Position Duty Statement

HR-41a (new 7/2015)

<b>Classification Title</b>	<b>Board/Bureau/Division</b>
Associate Budget Analyst	Office of Administrative Services
<b>Working Title</b>	<b>Office/Unit/Section / Geographic Location</b>
Budget Analyst	Fiscal Operations/Budget Office/Sacramento
<b>Position Number</b>	<b>Name and Effective Date</b>
610-721-5284-808	

General Statement: Under general direction of the Budget Manager (Staff Services Manager (SSM) I), the Associate Budget Analyst (ABA) will perform more technical and complex budget office work. As part of the Department of Consumer Affairs' (DCA) overall budget and fiscal administrative responsibilities, the ABA will independently perform the duties assigned, including, but not limited to, the following:

**A. Specific Assignments:**

**45% (E) Budget Preparation (Revenue/Expenditure)**

- Prepares more complex monthly projections by funding source for each assigned client. (15%)
- Prepares the annual budget package which includes schedule of major equipment, schedule of contractual services, out-of-state travel blanket, and workload and revenue statistics for assigned clients (board, committee, commission, program, division, or bureau). (10%)
- Prepares various schedules displayed in the Governor's Budget (2, 7A, Salary and Wages Supplement, Summary By Object, Fund Condition, Changes in Authorized Positions, Reconciliation With Appropriations); works with the Budget Manager to ensure accuracy and timely completion of schedules. (10%)
- Prepare and develop or assist clients in preparing Budget Change Proposals (BCPs) to conform to statewide or departmental policies/program objectives; accurately estimates program costs/revenues and presents alternatives to address the stated problem. Determines (if applicable) whether new monies are necessary or redirected funds would best support the proposal. Prepares the workload justification for new positions and determines the appropriate fiscal need based on the information obtained from the program. (5%)
- Prepares the operating budgets for the various clients. Obtains clients' priorities relative to the clients' appropriations. Updates division funding and staffing levels to reflect changing priorities. (5%)

**35% (E) Budget Monitoring**

- Monitors revenues and expenditures; researches and identifies potentially deficient budgets and cash flow problems; recommends the appropriate level for license fees and other revenue categories; makes recommendations on requests for appointment and the purchase of equipment, among others.
- Provides management alternatives and recommendations for meeting program goals and objectives while remaining with allocated resources. Consults, as needed, with client management who are responsible for managing statutorily-mandated programs. Consults

and makes recommendations with client management on complex/sensitive budgetary issues. Attends client meetings and may be responsible for presenting budget/fiscal issues.

- Independently provides budget training to Executive Management and DCA Managers by researching, analyzing, and developing training materials. Develops, prepares, presents, and assists in the preparation of special reports/projects or budget drills for Executive Management, Department of Finance (DOF), the Legislature, and the various regulatory bodies within DCA.

## 20% (E) Legislation/Regulations

- Serves as a program budget expert on legislation and regulatory packages for assigned clients. Works with client management in implementing administrative aspects by researching and conducting complex analysis of new policy initiatives, particularly as they relate to a client's business functions.

### B. Supervision Received

The ABA reports directly to, and receives assignments from, the Budget Manager (SSM I); however, direction and assignments may also come from the Budget Officer (SSM II), Fiscal Officer (SSM III), and DCA Executive Office. The ABA is responsible for the more complex special reports/projects. They are also expected to possess the ability to work more independently and with less direct supervision than is required by a Staff Services Analyst (SSA).

### C. Supervision Exercised

None

### D. Administrative Responsibility

None

### E. Personal Contacts

<u>Personal Contacts</u>	<u>Frequency</u>	<u>Type/Sensitivity</u>
Legislative staff <sup>1</sup>	1-2 times per month	Highly sensitive
Legislative analyst <sup>1</sup>	1-2 times per month	Highly sensitive
Agency <sup>2</sup>	1 times per month	Highly sensitive
Department of Finance <sup>3</sup>	1-2 times per month	Sensitive to routine
DCA Division Management <sup>3</sup>	3 to 6 times per month	Sensitive
Board/Bureau- Executive Officer/Chief <sup>3</sup>	2 to 4 times per month	Sensitive
Division Staff <sup>3</sup>	Daily	Sensitive to routine

### F. Actions and Consequences

The consequence of error is significant. Errors can negatively impact clients by not providing proper funding to allow the client to serve the public to meet the required health and safety needs of consumers. Frequent and/or significant errors could create a situation where DCA loses credibility with the DOF, Legal Affairs Office (LAO) and the Legislature, in addition to the various DCA Boards, Bureaus, Programs, and Committees. The loss of credibility will make it more difficult and require additional work in order to convince the various stakeholders that the information provided is correct and accurately represents the situation.

<sup>1</sup> Preparation of bill analysis

<sup>2</sup> Fiscal/budget discussion (e.g., regulations, BCPs, fund conditions)

<sup>3</sup> Discuss all DCA fiscal/budget documents (e.g., BCPs, regulations, bills, etc.)

**G. Functional Requirements**

The incumbent works 40 hours per week in an office setting, with artificial light and temperature control. Daily access to and use of a personal computer and telephone is essential. The incumbent must be able to remain in a stationary position 50% of the time.

**H. Other Information**

In order to perform satisfactorily, incumbents must possess knowledge of the state budget process, the organization and functions of State government, including the Legislature and Executive Branch, and DCA policies and procedures. Incumbent must possess good communication skills, use good judgement in decision-making, exercise creativity and flexibility in problem identification and resolution, manage time and resources effectively, and be responsive to DCA management and client needs. The incumbent may have access to confidential or sensitive program information and the individual occupying this position is expected to maintain the privacy and confidentiality of such information at all times. Incumbent must work cooperatively with peers, work under changing priorities and irregular hours, occasional travel and overtime, etc.

In all job functions, employees are responsible for creating an inclusive, safe, and secure work environment that values diverse cultures, perspectives, and experiences, and is free from discrimination. Employees are expected to provide all members of the public equitable services and treatment, collaborate with underserved communities and tribal governments, and work toward improving outcomes for all Californians.

**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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Employee's Printed Name, Classification

**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

**Department of Consumer Affairs**

Position Duty Statement

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Staff Services Analyst	Office of Administrative Services
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<b>Position Number</b>	<b>Name and Effective Date</b>
610-721-5157-808	

General Statement: Under the supervision of the Department of Consumer Affairs (DCA) Budget Manager (Staff Services Manager (SSM) I), the Staff Services Analyst (SSA) is responsible for the less technical and complex budget office work. In a training and entry capacity, the SSA's duties include, but are not limited to, the following:

**A. Specific Assignments:****45% (E) Budget Preparation (Revenue/Expenditure)**

- Prepares monthly projections by funding source for each assigned client. (15%)
- Prepares the annual budget package which includes schedule of major equipment, schedule of contractual services, out-of-state travel blanket, and workload and revenue statistics for the SSA's assigned clients (board, committee, commission, program, division, or bureau). (10%)
- Prepares various schedules displayed in the Governor's Budget (7A, Salary and Wages Supplement, Summary By Object, Fund Condition, Changes in Authorized Positions, Reconciliation With Appropriations); works with the Budget Manager to ensure accuracy and timely completion of schedules. (10%)
- Prepares or assists clients in preparing Budget Change Proposals (BCPs) to conform to statewide or departmental policies/program objectives; accurately estimates program costs/revenues and presents alternatives to address the stated problem. Determines whether new monies are necessary or redirected funds would best support the proposal. Prepares the workload justification for new positions and determines the appropriate fiscal need based on the information obtained from the program. (5%)
- Prepares client operating budgets and obtains their priorities as it relates to the client's appropriations. Updates division funding and staffing levels to reflect changing priorities. (5%)

**35% (E) Budget Monitoring**

- Monitors revenues and expenditures; identifies potentially deficient budgets and cash flow problems; recommends the appropriate level for license fees/revenue categories and on requests for appointment and purchase of equipment.
- Provides management alternatives and recommendations for meeting program goals and objectives while remaining with allocated resources.
- Consults, as needed, with client management who are responsible for managing statutorily mandated programs. Consults with client management on less complex/sensitive budgetary issues. Attends client meetings and may be responsible for presenting budget/fiscal issues. Provides budget training to Executive Management and DCA managers. Prepares, presents, and assists in the preparation of special reports/projects or

budget drills for Executive Management, Finance, the Legislature, and the various regulatory bodies within DCA.

## 20% (E) Legislation/Regulations

- Serves as a program budget expert on legislative/regulatory packages for clients and works with client management in implementing administrative aspects of new policy initiatives.
- Serves as a program expert on the business functions and processes of the various assigned clients.

### B. Supervision Received

The SSA reports directly to, and receives assignments from, the Budget Manager (SSM I); however, direction and assignments may also come from the Budget Officer (SSM II), Fiscal Officer (SSM III), and DCA Executive Office.

### C. Supervision Exercised

None

### D. Administrative Responsibility

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Employee Signature

Date

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Employee's Printed Name, Classification

**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