

## **APPELLATE COURT BUDGET ANALYST**

### **DEFINITION**

Under direction from the Chief Justice and the Chair of the Administrative Presiding Justices Advisory Committee and/or their designees, the incumbent provides financial recommendations and coordination for the Supreme Court, Courts of Appeal, and the California Judicial Center Library (CJCL) in support of the strategic objectives of the Chief Justice, the Administrative Presiding Justices (APJ), and respective Clerk/Executive Officers; serves as a subject matter expert in operations related to budget and fiscal planning; performs related work as assigned.

### **CLASS CHARACTERISTICS**

*Appellate Court Budget Analyst* is a single-incumbent class responsible for coordinating financial programs and providing sound fiscal and budgetary consultation to assigned entities including the Supreme Court, Courts of Appeal and the CJCL. This class also serves as a liaison between the assigned entities and the Judicial Council of California (JCC), effectively coordinating, maintaining, and monitoring a variety of administrative, budget, and fiscal communications between stakeholders.

### **EXAMPLES OF DUTIES** (*illustrative only*)

- Coordinates financial programs for assigned entities and provides subject matter expertise regarding sensitive and complicated budget, fiscal, and program issues and efforts.
- Serves as primary budget liaison between the assigned entities and the JCC Budget Services Office, effectively coordinating workflow, output, and communication among all stakeholders.
- Researches complex financial/budgeting principles or fiscal impact assessment of legislation and provides financially sound policy recommendations and advice in consultation with the JCC Budget Services Office.
- Prepares, analyzes, reviews and distributes monthly expenditure forecasts with the associated Personal Services Reports (PSRs) and Vacancy Reports and solicits the entities' feedback and expenditures projections.
- Analyzes revenue trends and constructs forecasts and estimates for revenue and expenditure projections; provides alternative budget scenarios for management review.
- Prepares, reviews, and distributes annual budget allocations.
- Performs specialized research and fiscal analyses related to personnel transactions and other operational activities, and provides recommendations to facilitate the planning and decision-making process.

- Provides technical and analytical support on budget development and management, expenditure forecasting, position and appropriation control.
- Performs appropriation control by reconciling initial and ongoing budget allocations to the Budget Act appropriation to ensure conformity.
- In consultation with the JCC Budget Services Office, drafts material to summarize, analyze, and justify budget proposals for assigned entities and prepares related schedules.
- Prepares Budget Change Proposals (BCP)/Finance Letters, and required documentation to request funding augmentations in coordination with the JCC Budget Services Office on any submittal to the state Department of Finance (DOF).
- Prepares BCP fiscal detail sheets indicating the cost of position(s) and/or operating expenses.
- As directed, prepares and provides verbal and/or written responses to BCP/Finance Letter questions, requests for information and/or analyses from the state DOF, Legislature and/or the Legislative Analyst's Office (LAO).
- Assists in providing Appellate Court budget related updates (i.e. Governor's proposed budget, May Revision, Budget Act, fund balances, etc.) to the Administrative Presiding Justices and Clerk/Executive Officers.
- Meets with managerial and executive staff to discuss specific needs in budget proposals.
- Informs managerial and executive staff of budget deviations, problems, and events likely to impact operations; explains causes; and measures impact on resources and operations.
- Attends APJ meetings, Appellate Court Clerk meetings, and/or other meetings as required.
- Performs cost-benefits analyses; prepares mid-year and annual year-end closing projections.
- Conducts workshops on budget and fiscal related issues.
- Coordinates the financial administration of grants.
- Confers with JCC as needed concerning Appellate Court fiscal matters that may require Department of Finance and/or other legislative action.

### **WORKING CONDITIONS**

- Work occasional evening and weekend hours.
- May be required to travel statewide as necessary.

### **QUALIFICATIONS**

#### **Knowledge of:**

- Principles and practices of budgeting and financial procedures.
- Principles and practices of developing and administering multiple, complex budgets.
- Principles and techniques of project management.
- Problem-solving and conflict resolution methods and techniques.
- Principles and methods of data collection and analysis.
- Practices of reviewing financial documents for completeness and accuracy.
- Principles and practices of grant preparation, administration, and auditing.
- Business arithmetic.

- The operation of personal computers and the use of specified computer applications, such as word processing and spreadsheets.
- Principles and techniques of preparing effective oral presentations.
- Principles and techniques of preparing a variety of effective written materials.

**Ability to:**

- Plan, analyze, organize, and administer programs and projects.
- Gather data, analyze findings, reason logically, and prepare analytical reports and recommendations.
- Use initiative and independent judgment within established procedural guidelines.
- Organize, prioritize, and coordinate multiple work activities and meet critical deadlines.
- Analyze and review budgets and financial operations.
- Develop and administer multiple complex budgets.
- Research complex financial/budgeting principles or fiscal impact assessments of legislation.
- Interpret, explain, and apply requirements, rules, and regulations related to various funding sources.
- Interpret, explain, and apply applicable laws, codes, and regulations.
- Review financial documents for completeness and accuracy.
- Maintain accurate financial records and prepare accurate and timely reports.
- Maintain discretion when dealing with sensitive budgetary matters.
- Make accurate arithmetic calculations.
- Operate personal computers and use specified computer applications, such as word processing and spreadsheets.
- Communicate effectively in English, orally and in writing.
- Establish and maintain effective working relationships with those contacted in the course of the work.
- Use tact and discretion in dealing with those contacted in the course of the work.

**Licenses and Certificates:**

None.

**Education and Experience:**

Equivalent to possession of a bachelor's degree, preferably with major course work in business or public administration or finance, and four years of professional analytical experience in budget development, analysis, and planning.

Additional directly related experience may be substituted for the education on a year-for-year basis. Possession of a directly related postgraduate degree may be substituted for one of the four years of required experience.

OR

Two years performing duties equivalent to an Associate Budget Analyst in the executive or legislative branches of the California state government.

OR

Two years as a Senior Budget Analyst with the judicial branch.