

BUDGET ANALYST

DEFINITION

Under direction, performs the full range of analytical tasks in budget development, analysis, and planning; performs related work as assigned.

CLASS CHARACTERISTICS

This is the journey-level class in the Budget Analyst series. Incumbents in this class possess specialized experience and knowledge of budget development, analysis, and planning, and have the full range of analytical budget responsibilities. This class is distinguished from Senior Budget Analyst in that the latter provides lead direction and work review to assigned staff and/or performs and coordinates complex and specialized work.

EXAMPLES OF DUTIES (*illustrative only*)

- Analyzes and reviews budget-related legislation and expenditure reports; drafts necessary issue reports.
- Confers with staff of executive and legislative branch agencies on budgetary matters.
- Reviews State Controller's Office documentation and reconciles to judicial branch data.
- Performs ongoing budgetary control of appropriations.
- Drafts material to summarize, analyze, and justify budget proposals for judicial branch and trial court funding and prepares related schedules.
- Reviews, analyzes, and drafts responses to budget proposals submitted by the courts and Judicial Council units.
- Meets with managerial and executive staff to discuss specific needs and negotiate changes or adjustments in budget proposals.
- Performs cost-benefits analyses; prepares mid-year and annual year-end closing projections.
- Writes curricula and conducts workshops on budget development package.
- Monitors the financial administration of grants.

WORKING CONDITIONS

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

QUALIFICATIONS

Knowledge of:

- Principles and practices of developing and administering multiple, complex budgets.
- 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:

- Analyze and review budgets and financial operations.
- Develop and administer multiple complex budgets.
- Interpret, explain, and apply requirements, rules, and regulations related to various funding sources.
- Interpret, explain, and apply basic principles and practices of grant preparation, administration, and auditing.
- Maintain accurate financial records and prepare accurate and timely reports.
- Maintain discretion when dealing with sensitive budgetary matters.
- Make accurate arithmetic calculations.
- Review financial documents for completeness and accuracy.
- Organize own work, set priorities, and meet critical deadlines.
- 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 three years of professional analytical experience, including two years 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 three years of required experience.

OR

Two years as a Staff Services Analyst (or equivalent classification) performing budget duties in the executive or legislative branches of the California state government.

OR

Two years as a Staff Analyst with the judicial branch in budget development, analysis, and planning.