

SENIOR BUDGET ANALYST

DEFINITION

Under direction, provides lead direction and work review to assigned staff, serves as a consultant, and/or performs and coordinates specialized work in budget development, analysis, and planning; performs related work as assigned.

CLASS CHARACTERISTICS

This is the lead and/or specialist level in the Budget Analyst series. Incumbents may serve in a lead capacity and direct the work of assigned staff, and/or may serve as specialists who work independently and deal with the most complex and/or sensitive projects. Incumbents exercise some degree of independent judgment and generally make policy recommendations affecting all trial courts, all Courts of Appeal, or the entire judicial branch. Incumbents may have primary responsibility for providing a specialized level of analysis in forecasting and cost accounting, revenues, research and analysis of complex financial/budgeting issues, or the fiscal impact assessment of legislation. This class is distinguished from Supervising Budget Analyst in that the latter is responsible for supervising budget staff, with effective authority for their selection, retention, and training and development and with responsibility for day-to-day supervision, evaluation, motivation, and discipline of employees.

EXAMPLES OF DUTIES (*illustrative only*)

- Provides lead direction, training, and work review; organizes and assigns work, sets priorities, and follows up to ensure coordination and completion of assigned work.
- Provides input into selection, evaluation, discipline, and other personnel matters.
- Researches complex financial/budgeting principles or fiscal impact assessment of legislation.
- Analyzes and reviews budget-related legislation and expenditure reports; drafts necessary issue reports.
- Makes policy recommendations on financial and budgetary matters.
- 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.
- Coordinates the financial administration of grants.

WORKING CONDITIONS

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

QUALIFICATIONS

Knowledge of:

- Basic supervisory principles and practices.
- Principles and practices of budgeting and financial procedures.
- 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:

- Plan, direct, and review the work of others on a project or day-to-day basis.
- 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 basic principles and practices of grant preparation, administration, and auditing.
- 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 three years of professional analytical experience in budget development, analysis, and planning, including one year of lead experience for those positions identified as lead.

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

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

OR

One year as a Budget Analyst with the judicial branch.