

“Just and reasonable” Worksheet

This purpose of this document is only to assist in determining that the Conservancy Chief Financial Officer compensation meets “just and reasonable” standards.

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March 12, 2018

The Board or an authorized committee of the Board is required to determine that changes to a chief financial officer’s compensation are “just and reasonable.” See excerpt from California Government Code, Section 12586(g):

The board of directors of a charitable corporation or unincorporated association, or an authorized committee of the board, and the trustee or trustees of a charitable trust shall review and approve the compensation, including benefits, of the president or chief executive officer and the treasurer or chief financial officer to assure that it is just and reasonable. This review and approval shall occur initially upon the hiring of the officer, whenever the term of employment, if any, of the officer is renewed or extended, and whenever the officer’s compensation is modified. Separate review and approval shall not be required if a modification of compensation extends to substantially all employees.

There are three sources used to help determine if the CFO’s compensation meets a “just and reasonable” standard in this worksheet:

- Excerpts from *Association Compensation & Benefits Study, 2016 - 2017 Edition*. American Society of Association Executives. This is the most current study available from ASAE. It is the primary resource for non-profit organization compensation administration.
- City of Sacramento (for comparable positions or relevant for other reasons).
- Levels of compensation for California Department of Human Resources Principal Program Budget Analyst Series.

Organization	(\$)	(\$)	Source
(ASAE) Controller – Trade Association	Median: 96,696	Average: 99,999	Table 1.24
(ASAE) Controller – Total Annual Budget (\$1,000,000 to \$4,999,999)	Median: 86,863	Average: 84,152	Table 1.24
(City of Sacramento) Accounting Manager	Start Range: 92,718	Top Range: 121,654	governmentjobs.com
(City of Sacramento) Senior Accountant Auditor	Start Range: 76,231	Top Range: 100,022	governmentjobs.com
(City of Sacramento) Senior Budget Analyst	Start Range: 83,673	Top Range: 109,787	governmentjobs.com
(State of CA) Principal Program Budget Analyst Series	Start Range: 91,140	Top Range: 113,928	jobs.ca.gov

Annual salary information for the CFO position is listed below:

Year	Annual Salary	Bonus
2004*	23,958	5,000
2005	59,225	2,000
2006	60,500	1,000
2007	63,525	-
2008	65,430	1,000
2009	67,394	-
2010	68,472	-
2011	69,841	-
2012	71,238	4,000
2013	75,000	6,000
2014	77,520	3,500
2015	81,396	2,000
2016	85,500	4,000
2017	88,500	5,000
2018	92,000	1,000

* 2004 was a partial year, Aug-Dec.

I look forward to continued service with the Conservancy.

Table 1.24 Controller

Manages financial operations, records, budget process, and controls. Analyzes financial systems and procedures for maximum effectiveness. May direct the finance department. May report to the chief financial officer or finance director. May also have extensive responsibilities for the operations and upgrades of financial systems/software.

	N	Median	Salaries			% CHG 2014 Median
			Mean	25th %	75th %	
All Organizations						
Base Salary	82	95,848	98,834	80,000	113,750	0.2
Total Compensation		101,768	106,898	85,232	119,613	-2.2
Organization Type						
Trade Association	27	96,696	99,999	83,170	115,000	-
Professional Association	42	98,327	102,663	82,398	113,273	-
Other	13	75,400	84,041	65,000	102,100	-
Total Annual Budget						
Under \$100,000	1	*	*	*	*	-
\$500,000 - \$999,999	0	-	-	-	-	-
\$500,000 - \$999,999	1	*	*	*	*	-
\$1,000,000 - \$4,999,999	29	86,863	84,152	70,000	95,000	-
\$5,000,000 - \$9,999,999	13	82,500	88,454	80,000	98,000	-
\$10,000,000 - \$24,999,999	26	102,198	105,778	91,500	114,725	-
\$25,000,000 or more	12	123,500	138,245	113,810	165,752	-
Total Staff Size						
5 or fewer	2	*	*	*	*	-
6 - 10	10	80,100	79,858	65,000	98,654	-
11 - 20	19	86,863	89,041	75,000	96,696	-
21 - 50	21	88,000	93,672	80,000	102,314	-
51 - 100	20	102,198	105,951	95,250	116,263	-
101 or more	10	120,507	140,947	112,620	168,343	-
Geographic Scope						
Local	1	*	*	*	*	-
State	9	79,600	76,426	62,500	87,452	-
Regional	4	*	*	*	*	-
National	24	100,736	103,541	83,750	114,757	-
North America	12	102,500	101,219	84,100	112,363	-
International/Global	32	99,548	103,705	82,799	116,257	-
Metropolitan Area						
Washington, DC	29	103,000	112,385	92,700	117,000	-
Chicago, IL	11	112,620	109,501	83,170	125,466	-



Accounting Manager

Class Code:
001701

Bargaining Unit: Sacramento City
Exempt Employees Association
(SCXEA)

CITY OF SACRAMENTO
Established Date: Apr 20, 2002
Revision Date: Apr 18, 2003

SALARY RANGE

\$44.58 - \$58.49 Hourly
\$3,566.07 - \$4,678.99 Biweekly
\$7,726.48 - \$10,137.81 Monthly
\$92,717.72 - \$121,653.68 Annually

DEFINITION:

Under limited direction, the Accounting Manager directs and administers the Accounting Division of the Finance Department; maintains financial records for all programs of the City and its related joint powers agencies; safeguards City assets and ensures compliance with City Council resolutions through establishment of an internal control structure of policies, procedures, and review of financial transactions; reports on the status of City financial transactions to City Council and other authorities.

DISTINGUISHING CHARACTERISTICS

This is a single-position classification. The Accounting Manager functions as manager over the Citywide accounting activities and provides technical accounting expertise to other City departments and related Joint Powers Agencies (JPA). The Accounting Manager is distinguished from the next lower classification of Principal Accountant in that the former is a management-level position with responsibilities over Citywide accounting function and activities.

SUPERVISION RECEIVED AND EXERCISED

Limited direction is provided by the Budget and Finance Director. Responsibilities include direct supervision of a major function containing professional, technical, and clerical positions.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Recruits, hires, trains, coaches, develops, evaluates, and promotes administrative, professional/technical, and management employees to accomplish the division's work load; plans, prioritizes, and assigns staff to maximize employee development, diversity of individual assignments, cross training, periodic job rotation, and match of individual skills and attributes.
- Establishes citywide, division, work unit, and individual process policies and procedures to create City's internal control structure over new, expanding, and ongoing programs, reviews and implements new or revised laws, regulations, or accounting standards.

- Develops, monitors, and reviews complex financial calculations, reconciliations, and reports over City financial transaction cycles, oversees development of annual financial statements, cost allocation, plans, and labor rates; assists in issuance of bonds.
- Oversees accounting/fiscal service delivery to City programs: establishes financial controls and accounting systems for new programs; monitors and reports on the status of various financial transactions; analyzes and explains unusual transactions; troubleshoots and resolves misdirected transactions.
- Oversees fiscal service delivery to various City Joint Powers Agencies, including maintenance of fiscal records, preparation of monthly/annual financial statements, development of budgets, and/or financial analysis and presentations to JPA Boards of Directors.
- Directs and monitors timeliness and accuracy of division's production work load, including twice-weekly vendor check production, biweekly employee payroll, monthly retiree payroll, and general ledger postings; conducts various City and Accounting Division administrative tasks such as staff meetings, proposing and monitoring division budget, approving expenditures, reviewing labor charges, monitoring small business procurement participation, division team projects, etc.
- Other related duties may also be performed.

QUALIFICATIONS:**Knowledge of:**

- Government accounting and auditing.
- Investment, debt financing, actuarial, and payroll administration practices.
- Federal (OMB) grant compliance and reporting requirements.
- Cash handling practices and controls.
- Municipal revenue sources, restrictions, and compliance requirements.
- Operating and capital cycle budgeting practices.
- Principles of supervision, training, and performance management.
- Budget preparation, program analyses, and revenue forecasting.

Skill in:

- Use of modern office equipment including computers, computer applications, and software.
- Training, motivating, and evaluating professional and clerical personnel.
- Financial analysis and review of financial statements.
- Creating and making formal presentations in a public forum.

Ability to:

- Manage teams of professional and administrative staff to accomplish technical, time-sensitive, high-volume, large-dollar transactions.
- Analyze, interpret, explain, and implement various Federal, State, and third-party regulations, rules and procedures, and department policies and procedures.
- Establish and maintain effective working relationships with City Directors and Managers, Administrative Services Department and Treasurer's Office management and staff, and outside auditors and consultants.
- Design and install new and improved complex accounting and record keeping systems, both manual and computer-based.
- Communicate effectively, verbally and in writing.

EXPERIENCE AND EDUCATION**Experience:**

A minimum of six years of progressively responsible accounting experience, including at least three years in a supervisory capacity, and management of an accounting operation using a mainframe accounting system. Public sector experience is highly desirable.

-AND-

Education:

Graduation from an accredited four-year college or university with major coursework in accounting or a closely related field.

SPECIAL QUALIFICATIONS**Driver License:**

Possession of a valid California Class C Driver License at the time of appointment. Individuals who do not meet this requirement due to physical disability will be reviewed on a case-by-case basis.

Certification:

CPA preferred.

CLASS HISTORY:

Adopted: 4/20/02

Revised: 4/18/03

Title Change:

Maintenance Update:

Abolished:

Class Code: 001701



Senior Accountant Auditor

Class Code:
001811

Bargaining Unit: Sacramento City
Exempt Employees Association
(SCXEA)

CITY OF SACRAMENTO
Established Date: Apr 20, 2002
Revision Date: Dec 31, 2015

SALARY RANGE

\$36.65 - \$48.09 Hourly
\$2,931.97 - \$3,847.00 Biweekly
\$6,352.60 - \$8,335.16 Monthly
\$76,231.15 - \$100,021.88 Annually

DEFINITION:

Under general supervision, the Senior Accountant-Auditor performs professional accounting or auditing work including recording and reporting of financial transactions and budgetary control for assigned funds and City departments; review accounts payable, payroll, tax, and other fiscal records; develop, document, review, and determine impact of new accounting and auditing procedures and standards; and prepare financial reports, statements, audit reviews, analyses, and annual work papers.

DISTINGUISHING CHARACTERISTICS

The Accountant-Auditor class is the journey level class in this series and is populated with multiple incumbents who make routine and/or limited commitments related to assignment and prescribed by organizational policies and procedures. The Accountant-Auditor class is distinguished from the next higher level of Senior Accountant-Auditor in that the latter has responsibility for a higher degree of accounting knowledge, expertise, and ability to independently handle progressively difficult assignments. Additionally, at the Senior Accountant-Auditor level, incumbents develop and implement complex accounting system modifications usually involving the lead of subordinate professional accounting personnel.

The Senior Accountant-Auditor class is the lead level of the series and is populated with multiple incumbents who interpret and assist in the development of policies and procedures. The Senior Accountant-Auditor is distinguished from the next higher class of Principal Accountant in that the latter has responsibility for development of policies and procedures, and supervision of higher-level accountant staff, and in the advanced, difficult and highly technical nature of specific tasks carried out by the Principal Accountant.

SUPERVISION RECEIVED AND EXERCISED

General supervision is provided by higher-level administrative or accounting personnel.

Responsibilities may include functional supervision of Accountant-Auditors and/or direct or indirect supervision of other lower level accounting or clerical personnel, or student interns.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Performs monthly cash reconciliation; reconciles bank accounts; identifies and resolves bank adjustments and discrepancies with City departments and the bank; obtains information from various departments to compile the activity and year-end balances for various governmental funds; performs analytical review of activity in each fund; substantiates compilation and analytical review with supporting work papers; obtains, reads, interprets, and understands technical master grant agreements and grant contracts; prepares capital grants roll forward schedule, and ensures the proper billing, collection, and spending of grant funds.
- Assists in budget preparation, proper expenditure coding, document preparation, and other accounting-related activities; monitors budget for various City departments and projects.
- Develops and documents accounting procedures; reviews and determines impact of new accounting and auditing standards; assists with implementation; incorporates changes in financial reporting standards into individual fund and Comprehensive Annual Financial Report templates; communicates changes in standards and impact of changes to other accountants.
- Provides accounting and tax reporting services to related organizations; reconciles, records, monitors, and accounts for major tax revenues, fines, and fees; responds to questions/issues/complaints regarding transient occupancy taxes and utility user taxes; monitors and responds to delinquency issues through oral and written contact; calculates, prepares, and records regular transfers of certain taxes and fees between funds.
- Assists, advises, and communicates with assigned operating departments on accounting, financial, and budget concerns; provides accounting services to related organizations; performs analytical review of activity; monitors, evaluates, and provides professional guidance to payroll staff engaged in operation, maintenance, and control of the biweekly payroll process; reviews and approves accounting transactions, including payment vouchers, material receiving reports, and journal vouchers, for various funds and organizations; compiles and prepares statistical and other special reports and performs special projects as necessary.
- May supervise, assign, monitor, evaluate, and provide professional and technical guidance to staff engaged in operation, maintenance, and control of relevant activities.
- Provides exceptional customer service to those contacted in the course of work.
- Other related duties may also be performed; not all duties listed are necessarily performed by each individual holding this classification.

QUALIFICATIONS:

Knowledge of:

- Accounting and auditing principles and practices.
- PC hardware and software capabilities and accounting applications.
- Principles of financial administration, including budgeting, financial reporting, data processing and purchasing.
- Modern office practices, procedures, methods, and equipment.
- Principles of supervision, training, and performance evaluation.

Skill in:

- Accounting and auditing concepts.
- Use of computers, computer applications, and software, and preparation of complex spreadsheets and Word documents.
- Identification and implementation of adequate internal controls.

Ability to:

- Examine and verify financial documents and reports.
- Prepare a variety of financial statements, reports, and analyses.
- Communicate effectively, both orally and in writing.
- Train and evaluate professional, technical and clerical personnel.
- Establish and maintain effective working relationships with those contacted in the course of work.

EXPERIENCE AND EDUCATION

Experience:

Three years of responsible technical or professional accounting experience. Certification as a Public Accountant is desirable.

-AND-

Education:

Completion of a Bachelor's degree from an accredited college in accounting, business or public administration or a closely related field with major coursework in accounting.

SPECIAL QUALIFICATIONS

Driver License:

Possession of a valid California Class C Driver License at the time of appointment. Individuals who do not meet this requirement due to physical disability will be reviewed on a case-by-case basis.

OTHER REQUIREMENTS:

Adopted: 4/20/02

Revised:

Title Change:

Maintenance Update: 12/2/05; 9/7/07

Abolished:

Class Code: 01811



Senior Budget Analyst

Class Code:
001920

Bargaining Unit: Sacramento City
Exempt Employees Association
(SCXEA)

CITY OF SACRAMENTO
Established Date: Feb 10, 2016
Revision Date: May 19, 2016

SALARY RANGE

\$40.23 - \$52.78 Hourly
\$6,972.78 - \$9,148.89 Monthly
\$83,673.32 - \$109,786.65 Annually

DEFINITION:

Under general direction, the Senior Budget Analyst performs highly responsible, complex, and varied financial and analytical work related to the City budget functions; conducts operational and fiscal analysis, budget review and analysis, and other complex analyses; evaluates impact of new or proposed legislation; and coordinates activities of the Budget Office with other departments, divisions, and/or outside agencies.

DISTINGUISHING CHARACTERISTICS

This advanced journey-level classification in the Budget Analyst series is located in the Budget Office and is populated with multiple incumbents. This classification is distinguished from the Principal Budget Analyst in that the latter is a team leader providing work direction and technical guidance to senior and entry-level budget analysts, performs the more complex and difficult projects, possesses a higher-level of technical and communication skills, and may supervise staff. The Senior Budget Analyst is distinguished from the Budget Analyst in that the former performs higher-level, complex financial and analytical work with a very high degree of independence and responsibility and may supervise Budget Analysts. This classification is distinguished from other analyst classes with financial responsibilities by the duties performed for development of the citywide budget and coordination with key fiscal staff from operating departments.

SUPERVISION RECEIVED AND EXERCISED

General direction is provided by the Budget Manager or higher-level management staff. Responsibilities may include direct or indirect supervision of professional, technical, or clerical staff.

ESSENTIAL DUTIES AND RESPONSIBILITIES:

- Conducts complex studies, surveys, and focus groups; collects information of difficult operational and financial problems; compiles and analyzes information, develops and evaluates options, prepares and presents recommendations for review by management.
- Assists in development and implementation of policies, procedures, goals, objectives

and priorities.

- Conducts complex studies and surveys pertaining to administration, personnel and operations; identifies issues; formulates and presents recommendations and options for addressing issues.
- Coordinates and participates in the preparation of the annual operating and capital budgets; manages department procurement; authorizes expenditures in accordance with budget; assists in monitoring and controlling budget activities.
- Serves as the lead in developing budgets and forecasts with program directors.
- Provides complex analysis of expenditures for each program, re-forecasts and develops new budgets.
- Evaluates or assists in the evaluation of new or proposed legislation, rules, and regulations; confers with affected parties; determines potential impacts to City operations and finances, and reports findings; analyzes, interprets, and applies policies, procedures, and regulations.
- Coordinates activities of the Budget Office with City departments and divisions, and with outside agencies; meets with citizen groups, represents the City in the community, at meetings, and at conferences.
- Reviews council reports to ensure financial information is accurate and that policy issues have been addressed in advance.
- Prepares and/or oversees the preparation of council reports for the Budget Office.
- Other related duties may also be performed; not all duties listed are necessarily performed by each individual holding this classification.

QUALIFICATIONS:

Knowledge of:

- Principles, practices, and techniques of public administration and public policy.
- Principles and practices of organizational, financial, and policy analysis.
- Principles and practices of organization, management, supervision, and team building.
- Principles, methods, and practices of municipal finance, budgeting, and accounting.
- Advanced research and analytical methods, techniques, and procedures.
- Project management.
- Computer applications including spreadsheet, database, word processing, and presentation software.
- Applicable Federal, State, and local laws, rules, and regulations.

Skill in:

- Use of modern office equipment, including computers, computer applications and software.

Ability to:

- Analyze a variety of complex financial and organizational problems, and make sound policy and procedural recommendations.
- Define problem, collect data, establish facts, and draw valid conclusions.
- Analyze and interpret financial reports.
- Communicate effectively orally and in writing using all communication mediums.
- Establish and maintain effective working relationships with others.
- Interpret and apply laws, regulations, and policies.
- Prepare comprehensive and accurate reports.
- Work effectively with sensitive and confidential information in a political environment.

- Adjust to rapidly shifting priorities and timelines.
- Work effectively in a team environment with departmental and citywide staff.
- Facilitate groups.

EXPERIENCE AND EDUCATION

Experience:

Four years of progressively responsible professional-level budget, accounting, and/or financial administrative and analytical experience including three years journey-level experience in forecasting, strategic planning, policy analysis, or financial analysis. Municipal experience is desirable.

Education:

Possession of a Bachelor's degree from an accredited college or university in public or business administration or a related field.

Substitution:

A Master's degree in one of the above fields may substitute for one year of required experience.

SPECIAL QUALIFICATIONS

Driver License:

Possession of a valid California Class C Driver License at the time of appointment. Individuals who do not meet this requirement due to physical disability will be reviewed on a case-by-case basis.

CLASS HISTORY:

Adopted: 2/10/16

Revised:

Title Change:

Maintenance Update:

Abolished:

Class Code: 001920



Principal Program Budget Analyst Series

California State Personnel Board Specification

Series established July 2, 1970

Scope

The classes in this series are used in the Department of Finance to perform a wide variety of staff work concerned with program budget planning, evaluation, and support; program budget policy analysis and formulation; reviewing budget requests; developing and defending the Governor's program budget; evaluating program performance; analyzing proposed legislation in process and providing assistance to management in conducting in-depth program analysis. Incumbents in this series are typically specialists who have demonstrated possession of intellectual abilities, analytical techniques, and personal qualifications to succeed in a variety of program budget analysis assignments with a particular area of program expertise. They identify program issues, conduct and/or review analytical studies and surveys and revenue forecasts; develop the cash budget, including cash management and supervision of debt programs; identify budget information system needs and interface requirements among other departments and branches of government; develop budget information systems; formulate program procedures-related problems; review and analyze bills proposed before the Legislature and advise management on the program and fiscal impact or potential fiscal impact; participate on or act as team, conference, or task force leaders on larger studies; and represent the Department of Finance and the administration as assigned.

This series is available for use only in the California State Department of Finance. Entry into this series would typically be by State employees who have had employment in or outside the State service that provided responsible analytical experience directly related to the preparation and/or review of program

budgeting proposals.

Schem Code	Class Code	Class
LF14	5270	Principal Program Budget Analyst I
LF12	5271	Principal Program Budget Analyst II
LF10	5273	Principal Program Budget Analyst III

Factors Affecting Position Allocation

Although it is recognized that this type of work represents a broad level concept, which justifies the use of three classes, the core level is represented by the Principal Program Budget Analyst II. As such, this represents a "control" level and the average salary range for all positions allocated to this series shall not exceed the salary range for the class of Principal Program Budget Analyst II.

Within this constraint, factors that affect the level of positions include: the scope of responsibility assigned, the complexity of work, the independence of action, program responsibilities, impact of decisions on statewide programs, degree to which consultation by the analyst is sought after and accepted by top management, decision-making responsibilities, and the demonstrable effect of analyst activity on major agency programs. Allocation to the appropriate level is governed by the following criteria:

1. The extent to which the program is susceptible to influence by the Principal Program Budget Analyst.
2. The relative complexity, variety, and magnitude of the programs.
3. The rate and intensity of program change.
4. The intensity and significance of special interest group pressures.

5. The magnitude of the expenditure program, giving consideration to the extent to which it is subject to control by the administration.

In addition, major consideration will be given to the degree of expertise in the program area and the creativity applied by the incumbent; the value of such factors to the Department of Finance and the capacity of the incumbents to deal effectively with the Department, group of departments, or agency to which assigned.

Definition of Levels

All Levels:

Serves as the Department of Finance's primary contact with one or more departments; develops expert fiscal and program knowledge in assigned area; identifies policy and program issues on which program analysis projects should be initiated; works with the department(s) to which assigned in preparation of the Governor's Program Budget; consults with line program managers regarding program; advises the Director of Finance and Governor's Office on decisions relating to the program budget and proposed legislation; has final authority to approve a wide range of financial documents that require Department of Finance approval; carries out program analysis projects, using a variety of analytical techniques to evaluate program effectiveness and program alternatives; serves as a resources person in assigned program area to assist other staff conducting program analyses; monitors program implementation; and represents the Department of Finance at subcommittee hearings of appropriate committees.

Principal Program Budget Analyst I

Positions are allocated at this level based on an evaluation of the assignment and incumbent in terms of the criteria discussed under Allocation Factors. Assignments are typically to a department, group of departments, or agency which currently have a minimum of sensitive programs, relatively small expenditures, or do not have significant impact on the State's total fiscal program; or the incumbent, due to newness to the assignment, is not yet able to function at a level of expertise that makes as major a contribution to the decision-making process as would be possible after a more prolonged exposure to the program within the assignment.

Principal Program Budget Analyst II

Positions are allocated at this level based on an evaluation of the assignment and incumbent in terms of the criteria discussed under Allocation Factors. Allocation at this level represents the acknowledged fully qualified level of principal responsibility. Assignments are typically to a department, group of departments, or agency which currently have an average range of sensitive programs, moderately complex expenditure patterns, have a significant impact on the State's fiscal resources, including important policy on program issues, and which deal with programs that are undergoing redefinition or redirection. The incumbent generally has been associated with the assignment to an extent sufficient to provide accepted expertise in the program areas, and she/he makes major contributions to the decision-making process, which are widely accepted within the administration and the Legislature.

Principal Program Budget Analyst III

Positions are allocated at this level based on an evaluation of the assignment and incumbent in terms of the criteria discussed under Allocation Factors. Assignments are only to those departments, groups of departments, or agencies which currently represent the most sensitive and complex programs and that have a major impact on the State's total fiscal resources. Typically, the assignments include policy-influencing recommendations in dynamic and controversial program areas. The incumbent brings an expertise to the assignment gathered over a period of association with the programs involved. She/he is alert in recognizing significant issues and creative in generating alternative solutions. She/he has considerable influence on the decision-making process and is respected for his/her knowledge, analytical ability, and judgment by the administration and the Legislature.

Minimum Qualifications

All Levels:

Experience applicable to one of the following patterns may be combined on a proportional basis with experience applicable to the other pattern to meet the total experience requirements.

Education: The following education is required when general experience is used to qualify at any level:

Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required

education on a year-for-year basis.)

Principal Program Budget Analyst I

Either I

Experience: One year of experience in the California state service performing duties of a Staff Finance Budget Analyst.

Or II

Experience: Four years of progressively responsible experience with duties involving the preparation, justification, and analysis, or the control and administration of a budget or budgetary program which may include revenue forecasting or expenditure estimates, and also must have included substantial utilization of program budgeting techniques. (Experience in the California state service applied toward this requirement must have included one year performing duties of a class comparable in level of responsibility to that of a Staff Finance Budget Analyst.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

(Applicants who are within six months of satisfying the experience or education requirements will be admitted to the examination, but they must fully meet the experience or education requirements before being eligible for appointment.)

Principal Program Budget Analyst II

Either I

Experience: One year of experience in the California state service performing duties of a Principal Program Budget Analyst I.

Or II

Experience: One year of experience in the California state service performing duties of a Staff Finance Budget Analyst.

Or III

Experience: Five years of progressively responsible experience with duties involving the preparation, justification, and analysis, or the control and administration of a budget or budgetary program which may include revenue forecasting or expenditure estimates, two years of which must have involved the utilization of program budgeting techniques. (Experience in the California state service applied toward this requirement must have included one year performing duties of a class comparable in level of responsibility to that of a Principal Program Budget Analyst I or Staff Finance Budget Analyst.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

(Applicants who are within six months of satisfying the experience or education requirements will be admitted to the examination, but they must fully meet the experience or education requirements before being eligible for appointment.)

Principal Program Budget Analyst III

Either I

Experience: One year of experience in the California state service performing duties of a Principal Program Budget Analyst I or Principal Program Budget Analyst II.

Or II

Experience: Five years of progressively responsible experience with duties involving the preparation,

justification, and analysis, or the control and administration of a budget or budgetary program which may include revenue forecasting or expenditure estimates, two years of which must have involved the utilization of program budgeting techniques and one year of supervisory experience. (Experience in the California state service applied toward this requirement must have included one year performing duties of a class comparable in level of responsibility to that of a Principal Program Budget Analyst I or Principal Program Budget Analyst II.) and

Education: Equivalent to graduation from college. (Additional qualifying experience may be substituted for the required education on a year-for-year basis.)

(Applicants who are within six months of satisfying the experience or education requirements will be admitted to the examination, but they must fully meet the experience or education requirements before being eligible for appointment.)

Knowledge and Abilities

All Levels:

Knowledge of: Principles, practices, and trends of governmental budgeting and accounting; research techniques; program budgeting techniques and governmental functions and organization; methods and techniques of effective program management and supervision; the legislation process and its impact on program selection and budgeting; a manager's/supervisor's responsibility for promoting equal opportunity in hiring and employee development and promotion, and for maintaining a work environment that is free of discrimination and harassment.

Ability to: Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental budgeting and managerial problems; develop expertise on the subject matter administered by the department or departments to which assigned; develop and evaluate program alternatives; analyze data and present ideas and information effectively; consult with and advise administrators or other interested parties; appear before legislative and other committees and testify in behalf of the Department of Finance and the administration on fiscal and program-related matters for either revenues or expenditures; use techniques such as model building and simulation, formulating assumptions and identifying constraints, estimating market demand in the public sector, allocation of limited resources, risk and

uncertainty, systems analysis, problem formulations, price incentives, and comprehensive program monitoring, evaluation, and control; gain and maintain the confidence and cooperation of those contacted during the course of work; coordinate the work of others; act as a team or conference leader; effectively promote equal opportunity in employment and maintain a work environment that is free of discrimination and harassment.

Special Personal Requirements

All Levels:

Demonstrated ability to act independently, open-mindedness, flexibility, and tact.

Class History

Class	Date Established	Date Revised	Title Changed
Principal Program Budget Analyst I	07/02/1970	03/03/1998	--
Principal Program Budget Analyst II	07/02/1970	05/23/2000	05/07/1985
Principal Program Budget Analyst III	07/02/1970	03/03/1998	05/07/1985

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Schem	Class Code	Full Class Title	Pay		SISA	Footnotes	AR Crit	MCR	Prob. Mo.	WWG	NT	CBID
			Compensation	Period								
LF14	5270	PRINCIPAL PROGRAM BUDGET ANALYST I	\$7,595.00 - \$8,621.00			01 19 29		1	12	E		E99
LF12	5271	PRINCIPAL PROGRAM BUDGET ANALYST II	\$7,972.00 - \$9,053.00			01 29		1	12	E		E99
LF10	5273	PRINCIPAL PROGRAM BUDGET ANALYST III	\$8,360.00 - \$9,494.00			01 29		1	12	E		E99
KT50	5455	PRINCIPAL PROPERTY APPRAISER (BOARD OF EQUALIZATION)	\$7,644.00 - \$8,681.00			01 19		1	12	E		M01
KR20	4954	PRINCIPAL RIGHT OF WAY AGENT	\$8,347.00 - \$9,479.00			01 19		1	12	E		M01
IE80	3881	PRINCIPAL SAFETY ENGINEER -ELEVATORS-	\$10,916.00 - \$12,400.00			01 19		1	12	E		M09
IG55	3911	PRINCIPAL SAFETY ENGINEER -INDUSTRIAL-	\$10,916.00 - \$12,400.00			01 19		1	12	E		M09
IG40	3885	PRINCIPAL SAFETY ENGINEER -MINERAL INDUSTRIES MINING AND TUNNELING-	\$10,916.00 - \$12,400.00			01 19		1	12	E		M09
IF10	3883	PRINCIPAL SAFETY ENGINEER -PRESSURE VESSELS-	\$10,916.00 - \$12,400.00			01 19		1	12	E		M09
IE35	3908	PRINCIPAL SAFETY ENGINEER -STAFF SERVICES-	\$10,916.00 - \$12,400.00			01 19		1	12	E		M09
AJ30	0100	PRINCIPAL STATE METROLOGIST	\$7,277.00 - \$8,265.00			01 19		1	12	E		M10
GV20	3330	PRINCIPAL STRUCTURAL ENGINEER	\$11,992.00 - \$13,621.00			01 19		1	12	E		M09
GJ50	3152	PRINCIPAL TRANSPORTATION ENGINEER, CALTRANS	\$11,992.00 - \$13,621.00			01 19		1	12	E		M09
JX71	4723	PRINCIPAL TRANSPORTATION PLANNER	\$8,347.00 - \$9,479.00			01 19		1	12	E		M01
ID52	3851	PRINCIPAL WATER RESOURCE CONTROL ENGINEER	\$11,992.00 - \$13,621.00			01 19		1	12	E		M09
IS87	4355	PRINCIPAL-FIRE AND LIFE SAFETY (DIVISION OF THE STATE ARCHITECT)	\$9,855.00 - \$12,339.00			01 19		1	12	2		R09
RP10	7442	PRINTER I, STATE COMPENSATION INSURANCE FUND	\$4,396.00 - \$4,568.00					1	6	2		R14
RO90	7441	PRINTER II, STATE COMPENSATION INSURANCE FUND	\$5,719.00 - \$5,930.00					1	6	2		R14
RO15	7433	PRINTING MECHANICAL SUPERINTENDENT	\$5,493.00 - \$6,821.00			01 43		1	12	E		S14
RF90	7233	PRINTING OPERATIONS ASSISTANT	\$3,455.00 - \$4,273.00					1	6	2		R14
RO20	7431	PRINTING PLANT MACHINIST	\$5,212.00 - \$5,370.00					1	6	2		R14
RG40	7221	PRINTING PLANT SUPERINTENDENT	\$5,689.00 - \$7,068.00			01 19		1	12	E		S14
RF70	7230	PRINTING PROCESS AND OPERATIONS PLANNER										
		A	\$4,149.00 - \$5,142.00			01 19 21	283	1	12	2		R14
		B	\$4,549.00 - \$5,651.00			01 19 21	283	1	12	2		R14
RF40	7225	PRINTING PROCESS AND OPERATIONS SUPERVISOR	\$5,390.00 - \$6,701.00			01 19		1	12	E		S14
RO60	7438	PRINTING TRADES ASSISTANT I	\$2,970.00 - \$3,059.00					1	6	2		R14
RO50	7437	PRINTING TRADES ASSISTANT II	\$3,428.00 - \$3,532.00					1	6	2		R14
CL90	1473	PRINTING TRADES PRODUCTION COORDINATOR	\$3,247.00 - \$4,005.00					1	6	2		R14
CL60	1485	PRINTING TRADES SPECIALIST TRAINEE (GENERAL)	\$2,221.00 - \$2,653.00			SISA		1	6	2		R14
CL85	1515	PRINTING TRADES SUPERVISOR I (GENERAL)	\$3,713.00 - \$4,595.00			01 43		1	12	2		S14
CL36	1516	PRINTING TRADES SUPERVISOR II (GENERAL)	\$4,305.00 - \$5,334.00			01 43		1	12	2		S14