



FISCAL ANALYST 3

1245

GENERAL DESCRIPTION OF CLASS

The FISCAL ANALYST 3 is a policy analyst and principal budget or fiscal adviser for a complex and large State division or State agency. Employees use analytic techniques to identify policy issues and recommend changes based on the agency mission and objectives. Employees analyze budget needs or resources in concert with long-term business plans and recommend fiscal policy adjustments. They adapt budgetary guidelines and program standards to fit the needs of specific programs based on regulatory or other change. They also establish and maintain long range budget and policy plans.

DISTINGUISHING FEATURES

This is the third of a three-level series. Employees use professional standards, theory and principles, available resources, and program objectives to develop fiscal processes and operations. Employees must individualize the existing administrative system. This individualization requires analysis of fiscal and program data that is complicated. Employees also adapt existing policy and guidelines to meet changing program requirements or goals.

The Fiscal Analyst 3 is distinguished from the lower levels by the responsibility for fiscal policy analysis, adapting guidelines to fit the needs of specific programs, and modifying budget processes to allow for changes in regulation, program requirements or goals.

The Fiscal Analyst class series is distinguished from the Accounting series because the work is primarily concerned with evaluating, coordinating and integrating an agency's overall financial functions. Although knowledge of accounting principles is helpful, it is not essential to do the work. In contrast, accountants maintain records and systems of assets, liabilities, profit and loss, tax liability or other financial activities. State accountants generally do not forecast future trends in revenues or expenditures, or decide future cash flows or budget requirements.

DUTIES AND RESPONSIBILITIES

The duties listed below are not inclusive but characteristic of the type and level of work associated with this class. Individual positions may do all or some combination of the duties as well as other related duties:

1. Administration of Budget and Fiscal Operations

Oversee fiscal activities. Collaborate with auditors and accountants to develop and maintain internal controls for compliance with State and internal audit standards. Evaluate fiscal systems and maintain procedures relating to expenditure and revenue practices.

Manage the budget planning and execution process. Develop or coordinate preparation of budget decision packages, reduction options, workload measures, program narratives. Analyze revenue projections of ending balances and evaluate compliance with legislative intent. Assist managers in developing and justifying budget proposals. Work with DAS budget analysts and Legislative Fiscal Office to solve department budget issues. Coordinate with budget offices to incorporate revenue forecasts into rebalance plans and budget preparation. Prepare finance plans.

2. Fiscal Consultation and Guidance

Explain work processes and train others. Advise others on how to use budget and fiscal processes. Contribute to a cross-functional work team by collaborating to solve problems. Advise managers on fiscal planning, analysis and system development. Guide managers in evaluating resource needs. Assist managers in setting and prioritizing service level goals and operational objectives. Discuss needed process changes or improved use of policies and budgeting tools to achieve program goals. Advise managers in techniques to make better use of budgeting tools for planning, managing and evaluating programs. Advise managers on financial planning as it relates to strategic goals and the planning of service improvements. Work with managers to identify and solve budget and cost accounting issues. Support program managers by modeling fiscal impacts of program changes and strategies. Do cost or benefit analyses.

3. Policy Analysis

Review fiscal impact statements for legislative concepts and proposed legislation; identify needed changes and develop recommendations. Testify on fiscal aspects of proposed legislation. Achieve compliance with administrative rules through modifying budget and fiscal operations. Participate in meetings as a principal advisor to decide long-range revenue projections. Conceptualize and recommend legislation to correct or enhance current systems. Evaluate fiscal performance with planned objectives, decide causative factors and recommend corrective action or policy changes. Decide feasibility of program proposals. Evaluate and then explain possible policy and operational issues that could affect program revenue and cost. Monitor policy and operational changes. Develop processes to evaluate the impact of policy changes

4. Fiscal Reporting

Lead teams to identify gaps and needed system enhancements. Work with Information System professionals to design and implement budget and fiscal system improvements that integrate individual processes. Use computer software to model resource scenarios. Organize and develop automated fiscal systems. Modify software to customize and maintain databases that compile and track fiscal data. Develop budget or fiscal reporting formats. Develop and revise methodologies for forecasting program cost and revenue. Develop and maintain electronic systems to track the deviation between budgeted forecast and actual levels. Update data tables relating to forecasting cost and revenues for major agency programs. Decide method and frequency of updating data. Explain data and forecasting methodology to Department of Administrative Services and legislative committees. Interpret and develop reports to explain shifts in service populations, program cost, policy changes and management actions.

RELATIONSHIP WITH OTHERS

Regular work contacts regardless of the method of communication are for advising, resolving problems and influencing or correcting actions. The Fiscal Analyst 3 frequently contacts senior managers by telephone, electronic mail or in person to review budget items, discuss reports and analyses, exchange information or solve problems. They regularly contact by telephone or electronic mail Department of Administrative Services budget analysts, other agency fiscal staff, and Legislative Fiscal staff to exchange information on budgets and programs.

The Fiscal Analyst 3 may lead work teams by assigning tasks, monitoring progress and workflow, checking the product, scheduling work and establishing work standards.

SUPERVISION RECEIVED

The Fiscal Analyst 3 works within Federal and State law, rules, regulations and agency policy and guidelines. There is no technical review of most of the work, but review occurs for achievement of overall program or project objectives.

General policy, precedent or non-specific practices exist. However, they may be inadequate and relevant only through approximation. In conjunction with theories, concepts and principles, these positions use judgment and resourcefulness in tailoring the existing guidelines for application to particular circumstance and dealing with emergencies.

KNOWLEDGE AND SKILLS (KS)**Extensive knowledge of:**

Principles and procedures of mathematics such as numbers, their operations and interrelationships including arithmetic, algebra, statistics and their application.
Principles, practices and systems of fiscal management.
Principles and practices of governmental budgeting and finance including the analysis and reporting of financial data.
Principles and practices of management and public administration.
Management analysis and planning techniques.
Analytical research procedures and methods.
Financial forecasting techniques.
Purposes, functions and fiscal operations typical to government organizations.
Computer financial methods applications and potentials.

Basic knowledge of:

Internal auditing and accounting principles and practices.
--

Skill to:

Find and identify essential information.
Identify the nature of problems.
Weigh the relative costs and benefits of a potential action.
Communicate technical information effectively orally and in writing to a diverse audience.
Use computer software to track, compile, analyze and forecast statistical and financial information.
Analyze information, reach valid conclusions and make sound recommendations.
Apply sound independent judgment in the solution of complex managerial budget problems.
Maintain cooperative relationships with those contacted during the course of work.
Model fiscal information and forecast data to arrive at conclusions.
Communicate verbally to defend a position.
Evaluate business operations to compute affect to budgets and funding expenditures
Study or survey management systems.
Interpret financial trends and statements.
Modify desktop software applications to compile, monitor and report fiscal information in an understandable format for a diverse audience.

NOTE: The KNOWLEDGE and SKILLS are required for initial consideration. Some duties performed by positions in this class may require different KS's. No attempt is made to describe every KS required for **all** positions in this class. Additional KS requirements will be explained on the recruiting announcement.

Adopted 1/02

Revised

STATE OF OREGON
 Dept. of Administrative Services
 Human Resource Services Division