

Office team. In addition, the position collaborates with auditors, accountants, systems professionals, and research staff in the work of improving the fiscal operations of the Department. The position helps to identify, analyze and make recommendations, and train others relating to fiscal policies and procedures.

The work of this position impacts multiple divisions within the Agency, and it evaluates data from different programs and divisions in order to identify financial trends and issues, and propose fiscal management solutions.

SECTION 3. DESCRIPTION OF DUTIES

The employee in this position is expected to recognize their responsibility to act ethically at all times in accordance with the very highest standards of integrity.

Regular attendance is an essential function required to meet the demands of this job and to provide necessary services.

The incumbent is expected to perform position duties in a manner which promotes customer service and harmonious working relationships, including treating all persons courteously and respectfully; engage in effective team participation through willingness to assist and support co-workers, supervisors, and other work-related associations; develop good working relationships with division and agency staff and supervisors through active participation in cross-divisional group projects and in identifying and resolving problems in a constructive, collaborative manner; demonstrate openness to constructive feedback and suggestions, in an effort to strengthen work performance; and contribute to a positive, respectful and productive work atmosphere.

The Oregon Accountability Model (OAM) depends upon a team approach to custody with security-series personnel and non-security personnel communicating effectively to maintain safe, secure, and sanitary correctional environments while preparing inmates for successful reentry into the community. The vast majority of DOC inmates will return to Oregon communities. Enhanced public safety, lower crime rates, and reduced recidivism can all be tied directly to attitudes and actions of correctional staff who must effectively apply DOC rules and transition initiatives in their daily interaction with inmates. All staff are expected to model pro-social behaviors; reinforce positive behaviors; redirect negative behaviors; and effectively communicate observed behaviors to responsible program staff, administrators, and supervisors in support of the OAM.

Correctional Case Management (CCM), the critical next step toward implementation of the Oregon Accountability Model, is a proactive, collaborative, multi-disciplinary process. The CCM process unifies procedures and personnel to balance departmental resources and an inmate's needs throughout his/her incarceration and community supervision.

Correctional Outcomes through Research and Engagement (CORE), is designed to monitor and measure the work we do every day. This allows DOC to identify opportunities to improve and/or streamline processes, use data to identify constraints, effectively use resources and, ultimately, promote public safety. CORE provides employees with opportunities to influence and improve the fundamental ways we do business.

The Oregon Department of Corrections has a zero-tolerance of sexual abuse and sexual harassment within its institutions/administration buildings/facilities that it owns, operates, or contracts with. The intent of the Prison Rape Elimination Act (PREA) is to ensure a safe, humane, and secure environment, free from the threat of sexual abuse and sexual harassment for all inmates and employee/volunteer/contractor/intern. All forms of sexual contact and sexual harassment between inmates and employees/volunteers/contractors/interns are prohibited by Oregon Department of Corrections policy. Therefore, if you are aware of any such incidents, you have a duty to report them to your supervisor.

All Department of Corrections staff have a valuable role in the delivery of multi-disciplinary services. Despite differences in their training, culture, and job specific mission, they all have some common goals. When all DOC staff share appropriate information and assist in the case planning of inmates, both the quality of change and the safety of the correctional environment improve. Mutual respect, proper orientation and training, and ongoing communication and cooperation provide the foundation of correctional case management. All staff are expected to follow CCM principles and practices.

List the major duties of the position. State the percentage of time for each duty. Mark "N" for new duties, "R" for revised duties or "NC" for no change in duties. Indicate whether the duty is an "Essential" (E) or "Non-Essential" (NE) function.

% of Time	N/R/NC	E/NE	DUTIES
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Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

30%			<p>Fiscal Analyst Leadership, Consultation and Guidance:</p> <ol style="list-style-type: none"> 1 Serve as the lead fiscal analyst in the DOC budget office. 2 Offer fiscal systems and process leadership to all members of the team, helping to expand the total team skill base in the area of financial systems, tools, and processes. This includes being able to communicate clearly regarding fiscal systems, financial models and tools, work processes, and budget and accounting principles to budget office team members and others, and also be able to advise and train agency stakeholders, as needed. 3 Offer teamwork oriented leadership, serving as an example of professional work ethic and behavior, and fostering an environment that promotes collaboration among team members. 4 Lead the fiscal analysts in analytical and problem solving efforts, including policy and process review, development, and implementation. 5 Lead the fiscal analysts in the efficient, timely, and accurate production of financial data models and reports for presentation, analysis, and decision-making. 6 Lead the development and execution of major components of the Department's biennial budget.
30%			<p>Administration of Budget and Fiscal Operations and Quality Assurance:</p> <ol style="list-style-type: none"> 1 Serve as the SABR Coordinator for the Budget Office. This includes, but is not limited to: executing and/or training and guiding appropriate staff in the execution of SABR coordination related duties, providing periodic review to ensure accuracy and compliance; assigning specific tasks to ensure work is completed accurately and timely. 2 Collaborate with auditors and accountants to develop and maintain internal controls for compliance with State and internal audit standards. 3 Use the Oregon Budget Information Tracking System (ORBITS), Position Information Control System (PICS), Automated Financial Accounting Manufacturing Information System (AFAMIS), and other financial data systems in the development and execution of the Department's budget. 4 Develop or coordinate preparation of budget decision packages,

reduction options, workload measures, and program narratives.

- 5 Assists in developing presentation materials for use in presenting to the Legislature, the Department of Administrative Services, and other State Agencies, as well as to other staff within the Department.
- 6 Reconciles division and program budgets to legislatively approved budgets.
- 7 Prepares budget deviation and contingency plans for assigned programs and divisions. Reallocates resources as needed to reflect expenditure patterns and plans.
- 8 Assist in the preparation of Emergency Board requests and reports. Updates agency budget based on approved actions.
- 9 Prepares budget status reports for program managers to allow them to monitor their financial performance against the legislatively approved budget. Recommends corrective action as needed.
- 10 Monitor and report on monthly expenditure projections for the Department.
- 11 Evaluate the financial performance of divisions in the context of established measures (Key Performance Measures, CORE Measures, and others), and assist managers in achieving their program goals by providing relevant financial data.
- 12 Quality assurance for all budget entries of the Department.

25%

Fiscal Review, Analysis, Pricings, and Implementation:

- 1 Adapt existing fiscal policies and guidelines to meet changing program requirements and/or goals.
- 2 Develop and review fiscal impact statements for legislative concepts, policy packages, and proposed legislation; identify needed changes and develop recommendations.
- 3 Evaluate fiscal performance within planned objectives, decide causative factors and recommend corrective action or policy changes.
- 4 Analyze expenditures for the functional units, working with Assistant Directors and managers to ensure that operations are within the scope of the approved budget and legal restrictions outlined by statute and rule.
- 5 For assigned divisions, review historical expenditures and revenues, financially model projected expenditures and revenues, and present this financial data to divisional management.
- 6 Lead pricing exercises that provide cost/benefit information to agency leaders in their decision making processes.
- 7 Be capable of quickly and accurately accessing and compiling financial information using complex search parameters across a variety of systems.

15%

Other Duties:

- 1 Work with Information System professionals to design and implement budget and fiscal system improvements.
- 2 Contribute to cross-functional teams by collaborating to solve problems and improve business practices.

- 3 Support program managers by modeling fiscal impacts of program changes and strategies.
- 4 Advise managers and conduct trainings in techniques to make better use of budgeting tools for planning, managing and evaluating programs.
- 5 Serve on various committees and process teams as directed.
- 6 Develop fiscal impact assessments for projects, including proposed improvement initiatives and system or process changes, coordinate with the affected stakeholders, managers or public safety partners.
- 7 Assist in financial research projects as assigned.
- 8 Other duties as assigned.

SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

Normal office conditions and hours. Additional commitment of time usually occurs during budget preparation and during preparation of special analyses and may require nights and weekend work. Occasional travel to institutions throughout the state. Supervised inmates are present in the building to perform maintenance and janitorial services.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

Primary budgetary guidelines are established by the Budget Office, Department of Administrative Services, various provisions of the Oregon Revised Statutes, and rules and policies of the Department of Corrections. Guidance is also provided by the Department's Fiscal Services unit and DAS guidelines, including GAAP and GASB. Oregon Revised Statute's governing state financial management and program operations are also used to direct budget and fiscal activities.

b. How are these guidelines used?

The established guidelines listed above are used to provide guidance for budget development, evaluation and program recommendations for agency managers. They also ensure that the Department develops and manages its budget within legal parameters. Statutory mandates are used in program budget development and evaluation.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

Who Contacted	How	Purpose	How Often?
<i>Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".</i>			
DAS: SABR Section	In Person/Phone	Statewide budget systems/audit issues	Varies
DAS: Chief Financial Office	In Person/Phone	Policy Issues and Development	Varies
DAS: Accounting Unit	In Person/Phone	Revenue and Expenditures, Policy Issues	Varies
Legislative Fiscal Office	In Person/Phone	Budget Research & Analysis	Varies
Fiscal Services – DOC	In Person/Phone	Research and Problem Solving	Varies
DOC Administrators and Functional Unit Mgrs	In Person/Phone	Budget Development and Mgmt	As Needed
Other State Agencies	In Person/Phone	Policy and/or Budget Research	Varies
External Stakeholders	In Person/Phone	Policy and/or Budget Research	Varies

SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

This position consults on budget decisions and makes recommendations to managers on interpretation of DOC and statewide budget policy. It applies accounting and budget principles to the budget development and execution process. In addition, the position coordinates various projects used to develop and implement policy and operational changes created through state, federal and/or local policy changes. In these roles, this position has authority to plan, schedule, and carry out the tasks necessary in accomplishing the specific goals or outcome. The position also has the authority to broaden or narrow the scope of the work in order to address any changes to the goals or intended outcomes. The Budget Manager will supervise this position and evaluate the overall impacts to state policy.

Choices and decisions applied for fiscal analysis affect accuracy of agency budget, budget execution and audit compliance. Incorrect budget projections or inaccurate analyses could have an adverse impact on successful program operation.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
<i>Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".</i>				
X7010X	8921002	Work is reviewed as projects or tasks are completed, depending on the purpose, complexity and audience.	Annually	To enhance the effectiveness and to help manage the challenges and risks of the work of this

position. To direct the work to best support the Departments Mission.

SECTION 9. OVERSIGHT FUNCTIONS**THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY**

- a. How many employees are directly supervised by this position? None
How many employees are supervised through a subordinate supervisor? None
- b. Which of the following activities does this position do?
- | | |
|--|---|
| <input type="checkbox"/> Plan work | <input type="checkbox"/> Coordinates schedules |
| <input type="checkbox"/> Assigns work | <input type="checkbox"/> Hires and discharges |
| <input type="checkbox"/> Approves work | <input type="checkbox"/> Recommends hiring |
| <input type="checkbox"/> Responds to grievances | <input type="checkbox"/> Gives input for performance evaluations |
| <input type="checkbox"/> Disciplines and rewards | <input type="checkbox"/> Prepares & signs performance evaluations |

SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

The person in this position must have excellent analytical and project management skills which enable them to effectively analyze complex policies and issues, and then evaluate options and implement solutions. This person should also be able to exercise appropriate judgment in the process of analysis and be able to conceptualize plans, policies, and procedures that are necessary for implementation. The person in this position should be able to effectively communicate and collaborate with others.

This position requires an extensive background and knowledge in accounting and budgeting principles and significant technical and systems skills.

This position must hold in confidence all knowledge of agency short- and long-range planning impact on staff and agency budgets. Analysts frequently work with information not available to other DOC employees or other agencies. Analysts are required to develop fiscal impacts on proposed reduction strategies, including program and staff reductions or elimination. A high degree of confidentiality is required for these positions. The analyst is also responsible for quantifying the impact of management / labor economic proposals.

The person in this position must be comfortable advising management and recommending innovative changes within the Department that assist the Department in managing its fiscal resources more efficiently and effectively.

The person in this position must be able to effectively express ideas orally and in writing, using appropriate language, organizing ideas and marshaling facts in an objective manner. This includes the ability to effectively describe technical data and information to a non-technical audience.

The person in this position is required to establish long-range objectives and specify the strategies and actions to achieve them.

Additionally, the person in this position must be able to envision new data elements that may be helpful in evaluating and improving current practices and outcomes.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

Operating Area	Biennial Amount (\$00000.00)	Fund Type
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Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

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SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name and position number.

SECTION 12. SIGNATURES

Employee Signature Date

Supervisor Signature Date

Appointing Authority Signature Date