



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
February 19, 2026

This position is:

- Classified
Unclassified
Executive Service
Mgmt Svc – Supervisory
Mgmt Svc – Managerial
Mgmt Svc - Confidential

Agency: Oregon Department of Energy

Facility:

- New
Revised

SECTION 1. POSITION INFORMATION

Form with fields a-j: Classification Title, Classification No, Effective Date, Position No, Working Title, Agency No, Section Title, Budget Auth No, Employee Name, Repr. Code, Work Location, Supervisor Name, Position type, FLSA status, Eligible for Overtime.

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who's affected, size, and scope. Include relationship to agency mission.

The Oregon Department of Energy's vision is to lead Oregon to a safe, equitable, clean, and sustainable future. ODOE helps Oregonians make informed decisions and maintain a resilient and affordable energy system.

ODOE helps Oregonians improve the energy efficiency of their homes, provides policy expertise to prepare for Oregon's future energy needs, staffs the Energy Facility Siting Council, provides technical and financial assistance to encourage investments in energy efficiency and renewable energy resources.

The Central Services Division is responsible for the critical operations that ensure the agency functions effectively, and efficiently, in support of its mission and in compliance with state and federal requirements.

management, providing secure, innovative, reliable systems that support agency operations. Facilities and records management, risk management, and employee safety functions ensure a safe, organized and compliant workplace. Additionally, the division manages employee services, including strategic workforce planning, recruitment, classification and compensation, employee relations, leave administration, training, wellness programs, and personnel action processing.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement. The primary purpose of this position is to:

The primary purpose of this position is to plan, organize, and manage the agency’s budget section and provide leadership for budget development, fiscal planning, financial analysis, and budget execution monitoring. This position serves as a strategic fiscal partner to executive leadership and division management and ensures that agency resources are planned, allocated, monitored, and reported in alignment with agency priorities, legislative intent, statewide fiscal policies, and applicable laws and regulations. This position oversees both the agency’s core budget staff and grant fiscal analyst(s) responsible for identifying funding opportunities, supporting applications, monitoring awards, and fiscal reporting.

SECTION 3. DESCRIPTION OF DUTIES

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
30%	N	E	Biennial Budget Development and Coordination
			<ul style="list-style-type: none"> • Integrate multiple restricted funding sources, including grants and dedicated funds, into a coordinated agency budget. • Determine appropriate funding strategies to support programs within legal and contractual constraints. • Analyze interactions among funding streams to ensure efficient and appropriate use of resources. • Direct development of the Current Service Level (CSL) budget, including adjustments, inflation factors, phase-ins/phase-outs, technical adjustments, and position changes required to maintain programs. • Validate assumptions, cost drivers, methodologies, and calculations to build the base budget and ensure accuracy and compliance with statewide guidance. • Coordinate agency input to develop the Agency Request Budget (ARB), including policy option packages, reductions, revenue proposals, and program changes. • Establish internal timelines, instructions, templates, and quality standards for program participation. • Evaluate proposed initiatives for fiscal feasibility, sustainability, and alignment with agency priorities. • Prepare required budget schedules, narratives, and supporting documentation. • Provide fiscal analysis and background materials for management decision-making. • Support development of the Governor’s Recommended Budget (GRB) by responding to analyst questions and providing supplemental information. • Track legislative actions and modifications leading to the Legislatively Adopted Budget (LAB). • Prepare materials for budget hearings, legislative testimony, and executive briefings. • Ensure compliance with statewide budget instructions, fund restrictions, and statutory requirements. • Maintain documentation supporting assumptions and decisions.

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit “Enter”.

25%	N	E	Budget Execution, Fiscal Monitoring, and Forecasting
			<ul style="list-style-type: none"> • Monitor financial performance across all funding sources and identify risks related to funding availability, restrictions, or timing.
			<ul style="list-style-type: none"> • Recommend adjustments to spending plans to maintain operations within authorized resources.
			<ul style="list-style-type: none"> • Ensure expenditures are charged to appropriate funding sources in compliance with requirements.
			<ul style="list-style-type: none"> • Oversee development of financial projections reflecting multiple revenue streams.
			<ul style="list-style-type: none"> • Analyze budget-to-actual variances and identify emerging risks or opportunities.
			<ul style="list-style-type: none"> • Recommend corrective actions such as rebalancing resources, adjusting spending plans, or requesting budget changes.
			<ul style="list-style-type: none"> • Review fiscal impacts of program changes, contracts, grants, and staffing actions.
			<ul style="list-style-type: none"> • Ensure compliance with statewide budgeting policies.
			<ul style="list-style-type: none"> • Oversee fiscal management of grant funding, including integration with the agency budget, monitoring of expenditures and revenues.
			<ul style="list-style-type: none"> • Produce periodic financial reports, dashboards and briefings for agency managers and division leadership.
			<ul style="list-style-type: none"> • Coordinate with accounting and payroll units to reconcile data and resolve discrepancies.
			<ul style="list-style-type: none"> • Support development of interim budget actions (e.g., Emergency Board requests, special session actions, or administrative adjustments).
			<ul style="list-style-type: none"> • Maintain internal controls and documentation supporting financial decisions.
20%	N	E	Legislative and Policy Fiscal Analysis
			<ul style="list-style-type: none"> • Evaluate fiscal impacts across all funding sources, including grant conditions and long-term sustainability.
			<ul style="list-style-type: none"> • Advise leadership on financial feasibility of proposed initiatives given funding constraints.
			<ul style="list-style-type: none"> • Direct preparation of fiscal impact analyses for proposed legislation and administrative rules.
			<ul style="list-style-type: none"> • Analyze financial implications of new programs, mandates, or operational changes.
			<ul style="list-style-type: none"> • Develop cost models, scenario analyses, and long-term projections.
			<ul style="list-style-type: none"> • Coordinate with policy staff and program managers to ensure accurate assumptions.
			<ul style="list-style-type: none"> • Monitor legislative activity affecting agency funding.
			<ul style="list-style-type: none"> • Prepare briefing materials, talking points, and background documents for agency leadership and legislative testimony.
			<ul style="list-style-type: none"> • Represent the agency in discussions with legislative fiscal staff.
			<ul style="list-style-type: none"> • Provide recommendations on fiscal risks, opportunities, and implementation considerations.
			<ul style="list-style-type: none"> • Provide official responses to information requests from the Legislative Fiscal Office and the Department of Administrative Services Chief Financial Officer.
15%	N	E	Leadership and Supervision
			<ul style="list-style-type: none"> • Direct and coordinate the work of fiscal staff responsible for budget development, forecasting, and grants fiscal management.
			<ul style="list-style-type: none"> • Establish priorities, standards, and methodologies for staff.
			<ul style="list-style-type: none"> • Coordinate communication with program management and staff, ensuring information is shared timely, consistently, and accurately.
			<ul style="list-style-type: none"> • Ensure documentation and coordination of decisions and files are maintained.
			<ul style="list-style-type: none"> • Work with Accounting to coordinate our accounting and billing structure to ensure the most consistent and efficient processes possible.
			<ul style="list-style-type: none"> • Review and approve complex analyses and reports prior to submission to leadership or external entities.
			<ul style="list-style-type: none"> • Ensure consistent application of fiscal policies.

			<ul style="list-style-type: none"> • Manage workload distribution to address multiple funding streams and reporting deadlines.
			<ul style="list-style-type: none"> • Assign work, set priorities, and ensure accuracy, completeness, and timeliness of deliverables.
			<ul style="list-style-type: none"> • Oversee fiscal aspects of grant activities, including funding identification, application support, award monitoring, and financial reporting.
			<ul style="list-style-type: none"> • Ensure continuity of operations through cross-training and workload planning.
			<ul style="list-style-type: none"> • Promote an inclusive, respectful, and collaborative work environment.
			<ul style="list-style-type: none"> • Establish procedures, workflows, and internal controls.
			<ul style="list-style-type: none"> • Identify opportunities to improve efficiency, accuracy, and transparency of fiscal processes.
			<ul style="list-style-type: none"> • Develop and maintain position descriptions and performance expectations.
10%	N	E	Executive Advising, Coordination, and Representation
			<ul style="list-style-type: none"> • Advise agency and division leadership on financial strategy, tradeoffs, and resource allocation.
			<ul style="list-style-type: none"> • Translate complex fiscal information into clear decision-making guidance documents.
			<ul style="list-style-type: none"> • Serve as primary fiscal liaison to statewide oversight entities on budget matters.
			<ul style="list-style-type: none"> • Provide authoritative financial information used for external decision-making.
			<ul style="list-style-type: none"> • Represent the agency on issues involving funding and fiscal performance.
			<ul style="list-style-type: none"> • Provide presentations to the Energy Advisory work Group and other partner organizations.
			<ul style="list-style-type: none"> • Testify before legislative committees regarding agency budget and fiscal issues.
			<ul style="list-style-type: none"> • Respond to formal information requests from oversight agencies.
			<ul style="list-style-type: none"> • Facilitate budget planning meetings and executive decision sessions.
			<ul style="list-style-type: none"> • Provide guidance to program managers on financial planning and accountability.
			<ul style="list-style-type: none"> • Negotiate and resolve fiscal issues with internal and external partners.
			<ul style="list-style-type: none"> • Ensure transparency and accuracy in fiscal communications.
Ongoing	NC	E	<ul style="list-style-type: none"> • Perform position duties in a manner that promotes customer service and harmonious working relationships, including treating all people courteously and respectfully. • Engage in team participation and collaboration through the willingness to assist and support co-workers, supervisors, and other work-related associations. • Develop good working relationships with agency staff and supervisors through active participation in accomplishing group projects and in identifying and collaborating to resolve problems in a constructive manner. • Demonstrate openness to constructive criticism and suggestions to strengthen work performance. • Contribute to a positive, respectful, and productive work atmosphere. • Foster and promote the importance and value of a diverse and discrimination and harassment-free workplace. • Respect diversity of opinions, ideas, and cultural differences. • Other duties as assigned. • Regular attendance is required to meet the demands of this job and to provide necessary services.

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.

Work is performed in a hybrid work environment with frequent deadlines, competing priorities, and periods of concentrated workload, particularly during legislative sessions and biennial budget development cycles. The office environment is an open landscape with cubicles and audible distractions. Duties require extensive reading, analysis, writing, and development of complex documents, including budget narratives, fiscal analyses, reports,

testimony, and formal correspondence. This position requires sustained concentration, strong reading comprehension, and the ability to synthesize large volumes of technical information.

As a finance role, the work also involves intensive quantitative analysis, including reviewing detailed financial data, performing calculations, reconciling figures, developing projections, and identifying trends or discrepancies across multiple funding sources. The position must interpret numerical data accurately, apply formulas and financial methodologies, and ensure consistency between narrative explanations and supporting figures.

Work typically involves prolonged computer use, including spreadsheets, financial systems, and document preparation tools. Responsibilities require attention to detail, accuracy in handling numerical information, and the ability to shift between analytical tasks and communication tasks.

The position must be able to transport themselves to the primary office location and State Capitol in Salem, as necessary, to attend meetings, briefings, hearings, or provide testimony. Occasional travel to other locations may be required to fulfill agency business needs.

This position requires long periods of sitting, standing, using a keyboard and other computer operations, and the use of a cell phone. Work requires lifting and carrying objects of up to 50 pounds, bending, and crouching. The work environment includes the use of electronic, audio-visual, and computer equipment. These working conditions are experienced daily. The employee must be able to complete work tasks under these types of conditions in this type of environment. An employee in this position must be available to work Monday through Friday with a regular 40-hour work schedule.

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.

Work is performed within a framework of state and federal laws, regulations, policies, and professional standards governing public finance, budgeting, grants management, and personnel supervision. Guidelines include, but are not limited to:

- Oregon Revised Statutes (ORS)
- Oregon Administrative Rules (OAR)
- Oregon Department of Energy Policies and Procedures
- Statewide budget instructions and fiscal policies issued by the Department of Administrative Services Chief Financial Office
- State accounting policies, and financial reporting requirements
- Federal grant regulations, cost principles, and award conditions
- Human resource policies applicable to supervised staff
- Code of Federal Regulations
- Oregon Accounting Manual (OAM)

b. How are these guidelines used?

The guidelines listed above are used to provide standards and procedures to facilitate the accomplishment of duties in a consistent and professional manner. Use of these guidelines helps ensure compliance with applicable laws, rules, policies, and regulations in the day-to-day operations in support of the agency’s mission.

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?
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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".

Agency Director	Scheduled briefings, MS Teams meetings, email, in-person, and through formal presentations	Provide high-level fiscal updates, strategic advice, and decision support regarding budget issues, risks, and resource allocation.	Periodic (as needed, more frequent during budget development or legislative session)
Division Administrators	By phone, email, in-person, and virtual	Advise on division budgets, program fiscal issues, policy impacts, and funding strategies.	Monthly or as needed
Program Managers	By phone, email, in-person, and virtual	Develop budgets, monitor expenditures, evaluate proposals, resolve fiscal issues, and provide guidance on funding	As needed; more frequent during budget cycle
Accounting, Payroll, and Procurement Staff	By phone, email, in-person, and virtual	Coordinate financial operations, reconcile data, implement budget decisions.	As needed
Budget and Grants Staff	By phone, email, in-person, and virtual	Assign work, review grant and budget fiscal activities, ensure accurate applications, monitoring and reporting.	Daily
DAS Chief Financial Office	By phone, email, virtual, and through formal submissions	Provide budget materials, respond to information requests, clarify guidance, resolve statewide fiscal issues.	Monthly or as needed; frequent during budget development and execution
Legislative Fiscal Office	By phone, email, virtual, through formal responses	Provide fiscal analyses, respond to information requests, clarify guidance, resolve statewide fiscal issues.	Monthly or as needed; frequent during legislative sessions
Members of the Legislative Assembly and legislative Committees	By email, virtual, in-person, formal testimony, briefings, written materials	Present budget information, explain fiscal impacts, and respond to questions.	As requested; typically, during sessions
Energy Advisory Work Group	By phone, email, virtual, in-person, formal presentations, meetings, written materials.	Present fiscal information on programs and budget status; respond to inquiries	Periodic (as scheduled)

SECTION 7. POSITION RELATED DECISION MAKING

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

This position makes decisions regarding budget development assumptions, fiscal forecasts, allocation and reallocation of resources within approved authority, prioritization of funding requests, interpretation of fiscal policies and grant requirements, and appropriate response to requests for financial information from oversight entities. Decisions involve balancing competing funding restrictions and priorities to maintain agency operations. The position also determines work priorities for budget and grant requirements, and the appropriate response to requests for financial information from oversight entities. The position also determines work priorities for budget and grants fiscal staff and establishes internal procedures for monitoring expenditures and compliance. These decisions directly affect the amount and distribution of funding available to agency programs, the agency's ability to operate within legislatively approved resources, compliance with state and federal requirements, and the quality and timeliness of information provided to executive leadership and policy makers. Sound decisions support continuity of services, effective implementation of legislative direction, and

maintenance of external confidence in the agency's financial management, while poor decisions could result in funding shortfalls, program disruptions, or loss of grant resources.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Business Operations Manager 3	0032001	Through meetings and informal conversations and quarterly performance accountability feedback.	Quarterly	Establish expectations, measure progress, provide feedback, and evaluate effectiveness.

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

- a. How many employees are directly supervised by this position? 5
 How many employees are supervised through a subordinate supervisor? 0
- b. Which of the following activities does this position do?
- | | |
|---|---|
| <input checked="" type="checkbox"/> Plan work | <input checked="" type="checkbox"/> Coordinates schedules |
| <input checked="" type="checkbox"/> Assigns work | <input checked="" type="checkbox"/> Hires and discharges |
| <input checked="" type="checkbox"/> Approves work | <input checked="" type="checkbox"/> Recommends hiring |
| <input type="checkbox"/> Responds to grievances | <input checked="" type="checkbox"/> Gives input for performance evaluations |
| <input checked="" type="checkbox"/> Disciplines and rewards | <input checked="" type="checkbox"/> Prepare & sign 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:

- Must successfully pass a criminal background check.

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

Operating Area	Biennial Amount (\$00000.00)	Fund Type

Note: If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".

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