



**STATE OF OREGON
POSITION DESCRIPTION**

Position Revised Date:
10/14/2025

Agency: 47100 Employment Department

Facility: Salem CO

☐ New ☒ Revised

This position is:

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

SECTION 1. POSITION INFORMATION

a. Classification Title: <u>Budget and Fiscal Manager 2</u>	b. Classification No: <u>X7074</u>
c. Effective Date: _____	d. Position No: <u>0000769</u>
e. Working Title: <u>Budget Manager</u>	f. Agency No: <u>47100</u>
g. Section Title: <u>Administrative Business Services</u>	h. Budget Auth No: <u>000265290</u>
i. Employee Name: _____	j. Repr. Code: <u>MMS</u>
k. Work Location (City – County): <u>Salem Central Office</u>	
l. Supervisor Name: <u>Carolina Valladares, Chief Financial Officer</u>	
m. Position: <input checked="" type="checkbox"/> Permanent <input type="checkbox"/> Seasonal <input type="checkbox"/> Limited Duration <input type="checkbox"/> Academic Year <input checked="" type="checkbox"/> Full-Time <input type="checkbox"/> Part-Time <input type="checkbox"/> Intermittent <input type="checkbox"/> Job Share	
n. FLSA: <input checked="" type="checkbox"/> Exempt <input type="checkbox"/> Non-Exempt	o. Eligible for Overtime: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No
If Exempt: <input checked="" type="checkbox"/> Executive <input type="checkbox"/> Professional <input type="checkbox"/> Administrative	

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 Employment Department is a large state agency with a mission to Support Business and Promote Employment. We accomplish this by accurately administering the unemployment insurance (UI) program for Oregon workers and business (Unemployment Insurance and Contributions and Recovery divisions); recruiting and referring applicants to job openings and assisting job seekers in their employment searches (Workforce Operations division); developing and distributing workforce and economic information (Workforce and Economic Research); administering a paid family and medical leave insurance program for Oregon workers and businesses (Paid Leave Oregon and Contributions and Recovery divisions); and providing administrative services to the Office of Administrative Hearings, which adjudicates citizen and business disputes with agencies.

The Oregon Employment Department fosters fairness, equity, and inclusion to maintain a workplace environment where everyone is treated with respect and dignity regardless of race, color, national origin, religion, sex, sexual orientation, gender identity, marital status, age, veteran status, disability, or status as a victim of domestic violence, harassment, sexual assault, or stalking. This policy applies

to every aspect of our employment practices, including recruitment, hiring, retention, promotion, and training. A goal of the Oregon Employment Department is to become an employer of choice for individuals of all backgrounds and promote an inclusive workplace culture that encourages diversity and allows employees to excel.

This position manages the Budget and Policy Analysis Unit, which exists within the Administrative Business Services section. The Budget and Policy Analysis Unit is responsible for the development and execution of the agency's biennial budget. This unit provides information to the Chief Financial Officer who advises the Director, Deputy Director, and the Executive Management team regarding the agency's financial position, strategies, and policies. The 2023-25 Legislatively Approved Budget for the Department is approximately \$3.3 billion, including an operating budget of \$640 million and 2,010 positions. Effective budget development and management is critical to the success of the Budget Unit and Employment Department programs.

The Administrative Business Services section supports agency operations through four core units: Budget and Policy Analysis, Contracts and Procurement Services, Accounting, and Property and Risk Management. These units administer: the collection and analysis of fiscal information and the publishing of fiscal and economic data to support policy development and informed decision making; purchases, contracts, vendor management, and reporting; central payroll services, accounts receivable, accounts payable, travel reimbursements, accounting, and statewide annual financial reporting; and, facilities leasing and sub-leasing agreements, operations and maintenance of owned and leased facilities, vehicle management and monitoring, and safety and risk management. The section researches and develops effective ways to improve the agency's ability to achieve its mission and goals through performance measurement, strategic planning, and continuous improvement strategies, and serves as liaison between the Employment Department and the Legislative Fiscal Office, the Secretary of State, the Department of Administrative Services' Chief Financial, Procurement Services, Risk Management, and Enterprise Asset Management, and property owners and management companies.

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

Provide professional, high-quality, efficient, calm, and confidential support to the agency. Carry out the goals and objectives of the Employment Department by providing efficient and effective management and supervision of the Budget and Policy Analysis Unit in the formulation, development, execution, and monitoring of the Department's biennial budget.

The position is responsible for overseeing the preparation of fiscal analyses of proposed legislation affecting the agency; facilitating and coordinating budget development efforts with program areas; overseeing the collection and creation of necessary budget back up documentation and reporting; and ensuring the timely preparation and compilation of the Agency Request Budget, the Governor's Recommended Budget, and the Legislatively Adopted Budget.

In addition to the development of the agencywide budget, this position is responsible for assisting managers in the development, evaluation, and analysis of programs and activities; oversight of the preparation of allotment plans to ensure adequate spending authority on program expenditures; monitoring budget execution for compliance with state and federal requirements; and proposing corrective financial action when required.

The Budget Manager position is a member of the Administrative Business Services management team; functions as the manager of the Budget and Policy Analysis unit overseeing workload for a staff of Eight ; collaborates with other units within the section; and partners with program areas to ensure fiscal needs are met by staff within the Budget and Policy Analysis unit.

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	
20%	NC	E	Administrative Responsibilities: Manage activities related to monitoring the Department's finances and budget execution, including but not limited to: <ul style="list-style-type: none"> • Federal grants, contracts, and other agreements; • Monthly reporting of expenditure and revenue projections; • Monitoring cash and allotment needs consistent with projected expenditures; • Position management as a legislatively approved resource. • Development of permanent finance plans for position actions; • Development of agency-wide projections to ensure agency stays within budget; and • Monthly Budget to Actuals by program area for each section
40%	NC	E	Budget and Policy Analysis Management: Manage the operational activities of Budget and Policy unit staff to ensure that agency revenues and expenditure information is actively collected, analyzed, and published. <ul style="list-style-type: none"> • Establish an environment of quality assurance to ensure financial information is accurate, complete, and timely. • Manage the development and preparation of budget documents for the Agency Request Budget, the Governor's Recommended Budget, Legislatively Adopted Budget (LAB), and requests for periodic updates to the LAB including Emergency Board and session requests during even years. • Assist with the preparation of the agency's Ways and Means presentation during legislative sessions. • Provide support to management in the presentation of the biennial budget and interim legislative requests. • Manage and review the workload for ORBITS and ORPICS submissions to SABRS. • Work with agency units to coordinate the implementation of approved Policy Option Packages including budget increases/decreases and changes in positions. • Ensure accuracy, completeness, and timeliness of OED's responsibilities for statewide budget reporting. • Serve as the agency's Budget representative to other agency units, other state agencies, and project teams when needed.

			<ul style="list-style-type: none"> Analyze issues and impacts of proposed policy changes to ensure sufficient resources are available to implement such policy changes effectively;
20%	NC	E	<p>Budget and Policy Analysis Staff Management: Manage a staff of professionals who participate in the management and oversight of the agency's financial activities.</p> <ul style="list-style-type: none"> Recruit, interview, select, hire, train, and monitor staff performance. Complete quarterly Performance Accountability Feedback (PAF) and annual goal setting with direct reports. Address personnel issues, including initiating disciplinary actions, employee complaints and grievances. Assign and review work and adjust workloads with Budget Analysts as required to effectively and efficiently utilize available personnel. Develop position descriptions and workload assignments to assure adequate separation of duties and compliance with internal controls; Evaluate section priorities, and realign assignments as necessary to accomplish the budget needs of the agency; Foster a work environment free of discrimination and harassment and one that promotes employee career development, including access to appropriate on-the-job training; Ensure that Budget and Policy Analysis Unit staff treat co-workers with dignity and respect; Model values included in the agency's strategic plan. Lead staff meetings to disseminate information and establish team expectations.
15%	NC	E	<p>Legislative Session and Fiscal Impact Statements:</p> <ul style="list-style-type: none"> Provide training to agency staff on fiscal impact statements for legislative concepts and proposed legislation. Work with agency legislative liaisons to ensure fiscal impact information is accurate, complete, and provided in a timely manner. Develop recommendations, alternatives, and impact statements for financial or operational programs. Determine and make recommendations regarding feasibility of program proposals; Function as liaison to CFO and LFO staff to ensure timely response(s) to requests for information.
5%	NC	N	<p>Other Duties:</p> <ul style="list-style-type: none"> Other duties and special projects as directed. May be required to assist other section staff with workload or special assigned as directed. May participate in work teams, committees, special projects, or statewide initiatives as directed. Perform other duties as assigned by Supervisor.
100%			

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.

This position functions in a pleasant, highly visible, highly productive, fast-paced environment. The person must be able to produce quality work on multiple projects, sometimes with rigid and competing deadlines, with frequent interruptions. This position is hybrid.

This position has daily contact with co-workers, customers, partners, and others from the Employment Department, federal and state governments, and other entities. The position has extensive contact with staff in Administrative Business Services. All communications require care in order to maintain and constantly improve relationships with internal and external customers, stakeholders, and peers; and, must deal with customers in a calm and courteous manner.

Requires extended time working at a computer with frequent use of common office technology. Work may include long periods of sitting and/or standing. Normal office hours are standard; however, circumstances may require working a flexible schedule or additional hours or both to meet deadlines, especially during unit, section, or agency-wide initiatives and projects, budget development, or legislative session. Occasional in-state and out-of-state travel may be required.

This position involves frequent contact with agency executives, senior managers, and program staff through virtual and in-person contact, written documents, email, and over the telephone. This position presents budget and analysis findings and recommendations, facilitates meetings, and recommends policy and/or legislative changes. This position may have contact with representatives from other state and federal agencies to obtain information, share information, and collaborate on legislative and policy matters. This position may also have contact with legislators to explain revenue sources, budget plans, internal processes, policy, and procedures. Occasional travel may be required. Normal office hours are standard; however, circumstances may require working a flexible schedule or additional hours or both to meet deadlines, especially during budget development or legislative sessions.

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.

- Federal rules, regulations, statutes, and guidelines related to the Employment Department
- Oregon Revised Statutes, Administrative Rules, manuals, policies and procedures
- City rules, regulations, statutes, and guidelines related to the Employment Department.
- Department of Administrative Services policies, protocols, and procedures
- Employment Department plans, policies, procedures, standards, and guidelines
- Collective Bargaining Agreements
- Americans with Disabilities Act requirements
- Equal Opportunity Act
- I
- Department of Administrative Services (DAS) budget instructions
- Budget reports
- Oregon Accounting Manual (OAM), Chapter 20: Budgetary, Accounting & Reporting
- OED Accounting Policies and Procedures
- ORPICS and ORBITS user guides

- Office of Management and Budget (OMB) Circulars and other Department of Labor (DOL) Publications
- Code of Federal Regulations (CFR), related to Grants, Expenditures & Programs managed by OED
- United States Code (USC), related to Grants, Expenditures & Programs managed by OED

b. How are these guidelines used?

These guidelines provide general guidance, policy direction, and framework to the employee who must interpret and apply them as necessary to perform their functions. Knowledge of these guidelines is used to make recommendations to Employment Department executives, managers, and staff to maintain conformity, continuity, efficient, and effective operations of the agency.

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>			
Employment Department employees	Verbal, written, virtual, in person	In carrying out position duties	As needed
Federal Agencies	Verbal, written, virtual, in person	In carrying out position duties	As needed
Legislative, Judicial, and Executive branches of the State	Verbal, written, virtual, in person	In carrying out position duties	As needed
Tribal and other Governmental entities	Verbal, written, virtual, in person	In carrying out position duties	As needed
General Public	Verbal, written, virtual, in person	In carrying out position duties	As needed

SECTION 7. POSITION RELATED DECISION MAKING

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

The primary decisions made by this position include:

Consults on budget decisions and makes recommendations to managers on interpretation of Department and statewide budget policy. Applies policy to budget development process and execution, and special program and fiscal analyses. 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 agency funding and successful program operation.

In most of these cases, the impact of poor decisions is a loss of efficiency, credibility, and/or customer service. In some cases, especially those regarding personnel issues, consequences of poor

decisions may include inappropriate disclosure of personnel-related information and/or delays to personnel-related actions.

Errors in judgements or decisions could be harmful or detrimental to the scope, quality, budget, and timely delivery of the Employment Department's services and operations, other state agencies, partners, stakeholders, and vendors and supplies, and could result in significant material and monetary loss and legal litigation.

Must exercise diplomacy and discretion in responding to confidential and private information dealing with personnel actions and other confidential information. Requires ability to maintain confidentiality. Processes personnel related and other items containing confidential information, ensuring security, and confidentiality of the information is maintained and timeliness requirements are met.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

Classification Title	Position Number	How	How Often	Purpose of Review
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".				
Chief Financial Officer, ABS Director, Budget and Fiscal Administrator 1	0001281	Verbal, written, virtual, in person	As needed	General guidance, review work, priority setting, coaching, training, specific feedback, annual review

SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

- a. How many employees are directly supervised by this position? 8
- 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 checked="" 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"/> 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:

This position requires successfully passing a criminal record check, which will require a fingerprint-based records check, as a condition of employment. This position will become CJIS certified and is

designated to have authorized access to Federal Tax Information (FTI). To verify identification, the employee shall be subject to a federal fingerprint-based record check and FTI fingerprint-based record check within 30 days of notice from management to verify identification.

This position requires discretion and strict adherence to confidentiality. This position may handle and process sensitive and confidential information.

This position may be subject to lead worker reviews, if applicable.

Must possess excellent communication and problem solving skills; relationship and team building skills; exercise sound judgment; and have the ability to interpret, analyze, and prioritize.

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 curser at end of a row (outside table) and hit "Enter".		
Personal Services, Services & Supplies	\$3,000,000	OF and FF

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