



STATE OF OREGON  
POSITION DESCRIPTION

Position Revised Date:  
December 09, 2025

**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**

a. Classification Title: Fiscal Analyst 3 b. Classification No: C1245  
c. Working Title: Senior Budget Analyst d. PPDB No/WD ID: 932002  
e. Section Title: Central Services Division f. Agency No: 33000  
g. Employee Name: VACANT h. Budget Auth No: 000168090  
i. Supervisor Name: \_\_\_\_\_ j. Repr. Code: UA  
k. Work Location (City – County): Salem – Marion

l. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year  
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share  
m. FLSA: ☒ Exempt If Exempt: ☐ Executive/Supervisory ☒ Administrative  
☐ Non-Exempt ☐ Professional  
☐ Computer n. Eligible for Overtime: ☐ Yes ☒ No

**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. We advance solutions to shape an equitable clean energy transition, protect the environment and public health, and responsibly balance energy needs and impacts for current and future generations.

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, represents Oregon's interests in the cleanup of the Hanford nuclear site, and ensures state preparedness to respond to energy-related emergencies. ODOE employs approximately 123 employees and is funded with revenue from more than 30 sources, including \$55.6 million in general funds, \$108.3 million in other funds, \$9.3

million in federal funds, \$1.4 million in lottery funds debt service, and \$29.4 million in non-limited loan program and debt service funds.

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. This includes financial management such as budgeting, accounting, payroll, procurement, contracting, and federal grants administration, to ensure fiscal integrity and resource stewardship. The division also oversees information technology and database 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:**

Coordinate, prepare, validate, and maintain the agency's budget across all phases, ensuring accuracy, compliance, and alignment with agency priorities and statewide budget processes. The position provides advanced fiscal and policy analysis to support strategic planning, evaluates financial trends and impacts, and offers clear, data-informed recommendations to agency leadership. As the agency's senior budget subject matter expert, the position maintains fiscal integrity and supports informed, responsible resource decisions.

### 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
<b>Note:</b> If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".			
35%	R	E	<b>Budget Development and Financial Planning</b> <ul style="list-style-type: none"> <li>Coordinate, prepare, enter, validate, and maintain all data that comprises the Current Service Level Budget (CSL), Agency Request Budget (ARB), Governor's Recommended Budget (GRB), and Legislatively Adopted Budget (LAB), including fund splits, policy option packages, revenue limitations, and position details.</li> <li>Enter, validate, and reconcile budget data in ORBITS, R*STARS/SFMA, and support fiscal tools. Run validation and error reports and resolve inconsistencies across systems and documents.</li> <li>Coordinate position numbering with Human Resources, ensure alignment and correct entry into ORPICS.</li> <li>Maintain comprehensive records of budget decisions, supporting calculations, and assumptions.</li> <li>Interpret statewide budget instructions and Legislative Fiscal Office (LFO) requirements.</li> <li>Determine indirect cost rates for cost-reimbursable grants and the Energy Supplier Assessment rate.</li> <li>Analyze revenue trends and prepare multi-year projections, reduction scenarios, and adjustments to align with fiscal policy and available resources.</li> <li>Maintain an understanding of every budget entry, fund type, revenue source, position authorization, and program structure and be prepared</li> </ul>

			to explain the fiscal and operational impacts of real or proposed budget changes.
			<ul style="list-style-type: none"> <li>• Prepare clear, accurate budget narratives reflecting program priorities and anticipated outcomes.</li> </ul>
			<ul style="list-style-type: none"> <li>• Identify resource needs for existing and emerging work and recommend adjustments based on statutory, federal, or legislative changes.</li> </ul>
			<ul style="list-style-type: none"> <li>• Respond to financial inquiries and collaborate with DAS CFO and LFO analysts to provide options and information to division leadership.</li> </ul>
			<ul style="list-style-type: none"> <li>• Develop presentation materials and analyses for internal and external presentations, including for division leadership, agency leadership, Governor's Office, legislative committees, and other partners.</li> </ul>
			<ul style="list-style-type: none"> <li>• Evaluate legislative concepts and bills for fiscal impact; prepare fiscal impact statements and responses to legislative inquiries.</li> </ul>
			<ul style="list-style-type: none"> <li>• Provide regular updates to division leadership on budget status, fiscal issues, and emerging trends.</li> </ul>
<b>35%</b>	<b>R</b>	<b>E</b>	<b>Budget Monitoring, Fiscal Analysis, and Reporting</b>
			<ul style="list-style-type: none"> <li>• Monitor limitation, expenditures, revenue, fund balances, and cash flow for compliance with statutory, legislative, and agency authority.</li> </ul>
			<ul style="list-style-type: none"> <li>• Conduct monthly and ad hoc fiscal analyses to identify emerging risks, cost pressures, and program impacts.</li> </ul>
			<ul style="list-style-type: none"> <li>• Develop and maintain financial models, forecasting tools, indirect cost rate, assessment rate and reconciliation schedules.</li> </ul>
			<ul style="list-style-type: none"> <li>• Produce official fiscal reports and supporting schedules for division leadership.</li> </ul>
			<ul style="list-style-type: none"> <li>• Maintain written procedures for budget development, system entry, validation, and reconciliation.</li> </ul>
			<ul style="list-style-type: none"> <li>• Recommend and implement improvements to reporting tools, templates, analytical methods, and internal controls.</li> </ul>
			<ul style="list-style-type: none"> <li>• Provide guidance to staff and supervisors on budget processes and interpretation of financial data.</li> </ul>
			<ul style="list-style-type: none"> <li>• Serve as the agency's SABRS coordinator with DAS CFO; ensure accurate reporting and system integration.</li> </ul>
			<ul style="list-style-type: none"> <li>• Support Interim Joint Ways and Means and Emergency Board submissions by preparing fiscal analyses, written materials, and presentations for leadership.</li> </ul>
			<ul style="list-style-type: none"> <li>• Maintain financial models, analytical tools, and data structures that support accurate and timely fiscal analysis.</li> </ul>
			<ul style="list-style-type: none"> <li>• Function as the primary contact for budget submittals, revisions, revenue reconciliation, and refund inquiries.</li> </ul>
			<ul style="list-style-type: none"> <li>• Interpret and apply state and federal budget-related laws, rules, and policies.</li> </ul>
			<ul style="list-style-type: none"> <li>• Provide fiscal analysis and support for new funding proposals, special projects, grants, and contracts.</li> </ul>
			<ul style="list-style-type: none"> <li>• Calculate, prepare and submit policy option packages and technical adjustments to Chief Financial Office.</li> </ul>
<b>25%</b>	<b>N</b>	<b>E</b>	<b>Internal Consultation and Fiscal Decision Support</b>
			<ul style="list-style-type: none"> <li>• Serve as a subject matter expert on budget structure, fund types, and expenditure authority.</li> </ul>
			<ul style="list-style-type: none"> <li>• Provide regular updates to division leadership on budget status, constraints, and fiscal impacts.</li> </ul>

			<ul style="list-style-type: none"> <li>• Offer technical assistance to programs on allowable spending and long-range budget considerations.</li> </ul>
			<ul style="list-style-type: none"> <li>• Prepare fiscal tables, position reports, and decision-impact summaries for division leadership for legislative hearings, drafting fiscal notes, responding to inquiries, and for agency testimony, as requested.</li> </ul>
			<ul style="list-style-type: none"> <li>• Draft responses to DAS and LFO inquiries regarding calculations, funding structure, and historical data.</li> </ul>
			<ul style="list-style-type: none"> <li>• Support audit and federal review activities by validating fiscal information and providing system reports.</li> </ul>
<b>5%</b>	<b>R</b>	<b>E</b>	<b>Grant Budget Integration and Support</b>
			<ul style="list-style-type: none"> <li>• Provide limited fiscal consultation to the Grants Officer (FA2) regarding grant budget alignment within the agency-wide budget.</li> </ul>
			<ul style="list-style-type: none"> <li>• Respond to occasional budget-related grant questions affecting overall fiscal planning.</li> </ul>
			<ul style="list-style-type: none"> <li>• Ensure grant revenue and expenditure information is accurately reflected in agency forecasts and reports.</li> </ul>
<b>Ongoing</b>	<b>NC</b>	<b>E</b>	<b>Miscellaneous</b>
			<ul style="list-style-type: none"> <li>• Perform duties in a manner that promotes customer service and harmonious working relationships; treat all individuals courteously and with dignity and respect.</li> </ul>
			<ul style="list-style-type: none"> <li>• Recognize the value of individual and cultural differences, demonstrate evidence of ongoing development of personal cultural awareness and humility, create and foster an inclusive work environment that is respectful, accepts diversity, and where talents and abilities are valued.</li> </ul>
			<ul style="list-style-type: none"> <li>• Develop positive working relationships with agency staff and supervisors by actively partnering, communicating, and supporting co-workers, identifying and collaboratively resolving problems constructively.</li> </ul>
			<ul style="list-style-type: none"> <li>• Demonstrate openness to constructive feedback and suggestions to improve work performance.</li> </ul>
			<ul style="list-style-type: none"> <li>• Contribute to a positive and productive work environment; perform all duties in a safe manner; and comply with all policies, procedures, and agency best practices.</li> </ul>
			<ul style="list-style-type: none"> <li>• Foster and promote the importance and value of a diverse and discrimination and harassment-free workplace.</li> </ul>
			<ul style="list-style-type: none"> <li>• Participate in collaborative and strategic relationships with key invested, involved, or impacted partners by holding awareness and being attentive to the direct and indirect accountabilities and opportunities to positively impact and influence the goals, strategies, actions, and measures outlined in the agency's strategic plan.</li> </ul>
			<ul style="list-style-type: none"> <li>• Other duties and special projects as assigned.</li> </ul>
			<ul style="list-style-type: none"> <li>• Maintains confidentiality of information that is exempt from disclosure under Oregon's public records law.</li> </ul>
			<ul style="list-style-type: none"> <li>• Ensure regular and consistent attendance to meet job demands and provide necessary services.</li> </ul>

#### 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.**

The office environment is an open landscape with cubicles and audible distractions. 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 10 pounds, bending, crouching, use of arms above

the shoulders, and transporting oneself throughout the office and to remote work locations. The position requires substantial reading, writing, and development of documents that require focus, reading comprehension, and writing skills. 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. The position may experience exposure to volatile or stressful situations and critical/hostile people. Work may require extended hours during the legislative session and as needed to accommodate short project timelines.

## 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.**

- Oregon Revised Statutes (ORS)
- Oregon Administrative Rules (OAR)
- Policies and procedures of the Oregon Department of Energy (ODOE)
- Policies and procedures of the Oregon Department of Administrative Services (DAS)
- Federal grant rules and regulations (OMB)
- Rules and regulations of the US Department of Energy (DOE)

**b. How are these guidelines used?**

This position interprets state and federal laws, rules, and regulations to ensure accurate budget development, fiscal compliance, and proper application of costing principles. Guidelines are applied to develop procedures, financial tools, and models; evaluate proposed legislation and amendments for fiscal impact; and maintain agency-wide adherence to statutory, regulatory, and policy requirements.

## 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?
<b>Note:</b> If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".			
Agency employees	In person, phone, email, virtual	Exchange information and provide guidance on budget processes and fiscal questions	Daily
Central Services Division Leadership	In person, phone, email, virtual	Provide fiscal summaries, funding impact analyses, and decision support; respond to budget inquiries; support fiscal note preparation and legislative hearings	Daily
Agency Accounting/Fiscal Staff	Phone, email, virtual	Coordinate on reconciliations, expenditure and revenue reporting, and fund tracking	As needed
DAS Chief Financial Office	Phone, email, virtual	Submit budget documents, request technical corrections, and clarify statewide fiscal policies	As needed
Agency IT and Systems Support	Phone, email, virtual	Troubleshoot issues with budget and financial systems	As needed

## SECTION 7. POSITION RELATED DECISION MAKING

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

This position operates independently under general guidance and serves as the agency's technical expert on budget structures, fund types, and financial models. The incumbent determines proper budget entry structure,

fund coding, and reconciliation methods, and identifies and corrects inaccurate or incomplete budget data. Decisions include selecting appropriate analytical approaches, interpreting and applying complex federal, state, and agency fiscal regulations, and preparing recommendations that inform resource allocation within established authorities.

The incumbent structures budget analyses, evaluates financial risks, and develops scenarios to support executive decision-making. Decisions must balance fiscal accuracy, regulatory compliance, and alignment with the agency’s priorities and mission. Errors in analysis or execution could result in legislative or executive budget inaccuracies, financial instability, non-compliance with laws or policies, or disruptions to agency operations.

**SECTION 8. REVIEW OF WORK**

**Who reviews the work of the position?**

Classification Title	Position Number	How	How Often	Purpose of Review
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*Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".*

Business Operations Manager 3	0032001	Through ongoing dialogue, collaborative check-ins, and structured performance evaluations. Feedback may be provided during team meetings or one-on-one discussions.	Quarterly	To provide guidance, support professional development, ensure alignment with program goals, and assess performance and effectiveness.
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**SECTION 9. OVERSIGHT FUNCTIONS      THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY**

a. How many employees are directly supervised by this position?  
How many employees are supervised through a subordinate supervisor?

0

0

b. Which of the following activities does this position do?

☐ Plan work

☐ Assigns work

☐ Approves work

☐ Responds to grievances

☐ Disciplines and rewards

☐ Coordinates schedules

☐ Hires and discharges

☐ Recommends hiring

☐ Gives input for performance evaluations

☐ 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:

- Employment is contingent upon the successful completion of a criminal background check.

BUDGET AUTHORITY: If this position has authority to commit to 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 curser 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