



STATE OF OREGON
POSITION DESCRIPTION

Position Revised Date:
January 18, 2024

Agency: Oregon Department of Energy

Facility:

[] New [x] Revised

This position is:

- [x] Classified
[] Unclassified
[] Executive Service
[] Mgmt. Svc – Supervisory
[] Mgmt. Svc – Managerial
[] Mgmt. Svc - Confidential

SECTION 1. POSITION INFORMATION

a. Classification Title: Fiscal Analyst 2
b. Classification No: C1244
c. Established Date: July 1, 2011
d. Position No: 1244002
e. Working Title: Budget Analyst
f. Agency No: 33000
g. Section Title: Finance & Operations
h. Budget Auth No: 001119530
i. Employee Name: Vacant
j. Repr. Code: UA
k. Work Location (City – County): Salem – Marion
l. Supervisor Name:
m. Position: [x] Permanent [] Seasonal [] Limited Duration [] Academic Year
[x] Full-Time [] Part-Time [] Intermittent [] Job Share
n. FLSA: [] Exempt [x] Non-Exempt
If Exempt: [] Executive [] Professional [] Administrative
o. Eligible for Overtime: [x] 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 fund, \$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 provides shared services for budgeting, accounting, payroll, contracting, federal grants management, information technology management, database development and management, facilities, records management, risk management, employee safety, and office reception.

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 budget analysis and fund management for the agency, which includes but not limited to developing, controlling, and monitoring the biennial budget; interpreting state laws and regulations to ensure compliance; and working directly with internal partners to provide updated budget allocations and projections.

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
50%	R	E	<p>Data Analysis and Reporting</p> <ul style="list-style-type: none"> • Prepare monthly expenditure reports and review for accuracy compared to budgeted costs. • Review monthly payroll reports for accuracy of staff charges by funding source. • Identify discrepancies within monthly reports and work with program and other finance staff to make corrections. • Participate in regularly scheduled meetings with division management to maintain leadership awareness of budget activity. • Provide data and analysis of energy incentive programs to fulfill record requests from legislature, the public and agency staff. • Collaborate with agency managers and program staff to determine best method to research, analyze and create ad hoc data reports. • Update the Statewide Fee database for all types of fees collected by the agency.
45%	R	E	<p>Budget Analysis and Forecasting</p> <ul style="list-style-type: none"> • Assist in the development, monitoring, and implementation of the agency biennial budget. • Translate the agency's legislatively approved budget into operating budgets by sections, program areas, specific projects, and/or specific funding sources. • Analyze reports to provide revenue and expenditure trends for program managers. • Maintain information and updated reports on funding changes and budget impacts. • Formulate budget changes based on statutes, federal regulations, legislative and program directives. • Maintain personnel cost projections by funding source and review changes with management. • Develop and maintain monthly budget and financial status reports for divisions. • Interpret and review budget with managers and staff providing pertinent and timely feedback to facilitate an interactive review process. • Work with division management and staff to ensure program compliance by comparing performance with plans. • Identify operational strengths and weaknesses, or problem areas of noncompliance, and work with staff to recommend improvements to management. • Provide support to program managers in developing budget action plans, and creating follow-up reports for them that monitors progress. • Work with all levels of management; develop budgetary needs of existing and new activities, including analysis and forecast of revenue and expenditure trends and program modifications. • Respond to financial questions from the Department of Administrative Services and Legislative Fiscal Office as necessary.

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

			<ul style="list-style-type: none"> • Prepare fiscal analysis for proposed legislation.
			<ul style="list-style-type: none"> • Research feasibility of new programs and funding mechanisms to ensure cost recovery for program administration.
			<ul style="list-style-type: none"> • Utilize information on office services, funding, staffing, performance measures, and costs to provide technical assistance to ensure stable funding for programs.
			<ul style="list-style-type: none"> • Duties may include identifying and resolving legal and policy issues, providing task analysis, and developing line-item budget costs, researching legal aspects, and developing project schedules.
5%	R	E	Key Performance Measures
			<ul style="list-style-type: none"> • Update and document methods used for data tracking and analysis in the preparation of the KPM Annual Report. Train staff to ensure sufficient understanding of methods and accurate application of methods.
			<ul style="list-style-type: none"> • Oversee or prepare and enter data into KPM reporting system. Respond to requests for KPM reports and supplemental information, as needed. Ensure the agency meets all performance reporting requirements.
On-Going			<ul style="list-style-type: none"> • Perform position duties in a manner which promotes customer service and harmonious working relationships, including treating all persons 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.

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 50 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, during an emergency, 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)

b. How are these guidelines used?

To assure agency compliance with state and federal rules, regulations and cost principles

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>			
Agency staff	phone/person/letter	Information/Tech. Asst.	Daily
Funding Agencies	phone/person/letter	Planning meetings, task forces, Conferences & committees.	As needed
State agency staff	phone/person/letter	Information	As needed

SECTION 7. POSITION RELATED DECISION MAKING

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

Makes decision on the development, monitoring, and execution of the division budgets. Reviews and recommends allowable project expenditures. Provides interpretation of state and federal laws and regulations. Mistakes may result in financial liability to the Agency, loss of federal funding, legal non-compliance with Legislative intent.

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>				
Business Operations Manager 2	0032001	Through formal and informal conversations and meetings, and quarterly performance accountability feedback	Quarterly	Establish expectations, measure progress, provide feedback, and evaluate effectiveness

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

a. How many employees are directly supervised by this position? 0
 How many employees are supervised through a subordinate supervisor? 0

- 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"/> Prepare & 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:

- 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
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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