



**STATE OF OREGON
POSITION DESCRIPTION**

Position Revised Date:
August 15, 2023

This position is:

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

Agency: Department of Administrative Services

Division: Chief Financial Office

☐ New ☒ Revised

SECTION 1. POSITION INFORMATION

a. Classification Title: <u>Policy and Budget Analyst</u>	b. Classification No: <u>X1143</u>
c. Effective Date: _____	d. Position No: _____
e. Working Title: <u>Policy and Budget Analyst</u>	f. Agency No: <u>10700</u>
g. Section Title: <u>Budget and Management</u>	h. Budget Auth No: <u>000000070</u>
i. Employee Name: <u>Vacant</u>	j. Repr. Code: <u>MMN</u>
k. Work Location (City – County): <u>Salem – Marion County</u>	
l. Supervisor Name (Optional): <u>Tamara Brickman</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 type="checkbox"/> Executive <input type="checkbox"/> Professional <input checked="" 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 Department of Administrative Services (DAS) is the central administrative agency that leads state government to implement the policy and budget decisions of the Governor and Oregon Legislature. Employing an enterprise-wide perspective, DAS serves state government by developing and upholding accountability standards to ensure productive and efficient use of state government's financial, human and information resources.

DAS provides a stable management infrastructure and essential business services including, financial, procurement, publishing/distribution, human resources and facility asset management. These services support and enable state and local government agencies to carry out their missions, benefiting all Oregonians.

The Office of the Chief Financial Office (CFO) is responsible for enterprise-wide fiscal planning and policy leadership. The CFO provides guidance, training and direction to ensure fiscal integrity and consistency across executive branch state agencies. The CFO develops the Governor's budget and guides execution of the legislatively approved State budget to conform to Governor's policies, state laws, and legislative appropriations. The Office routinely

represents the Governor with other elected officials, political subdivisions, and other states. Specific policy sections within the CFO include Budget and Management, Statewide Accounting and Reporting (SARS), Statewide Audit and Budget Reporting (SABRS), and Capital Finance and Planning (CFPS).

The Budget and Management section supports state agencies and the Governor with coordination, providing information, and performing analysis for budget process and the legislative sessions. During the interim periods, Budget and Management staff monitors execution of agency budgets and provide services to state agencies to improve management and serves state agencies and the Governor by providing financial and budgetary information and analysis. Under direction from the Governor and the CFO, the section performs analysis and makes recommendations on agency requests during the interim legislative processes.

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 purpose of the Policy and Budget Analyst is to identify and conceptualize legislation, rules, fiscal policy, performance standards, and strategies for State Governments' fiscal policy direction. The position manages and administers State government complex budget processes and programs across agency and program lines. This position serves at the highest level in an advisory capacity to the Governor, Legislature, Department Director, Chief Financial Officer, and state agencies on fiscal policy issues, programs, and on the development of government budgets.

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
40%	R	E	Management and Administration Develop understanding of agency programs through various methods, including: legal and policy issue research, document review, analysis of submitted information, field work, etc. Review, analyze, and manage complex policy issues; develop recommendations and proposals for the Governor and DAS for assigned program areas on statewide fiscal policies and emerging issues. Manage problem-solving activities among state agencies, the Legislature, stakeholders, businesses, local government, and federal agencies. Advise agency heads and other agency leadership on program direction, budgeting, policy and organizational issues, including: <ul style="list-style-type: none"> • Interpretation of Governor's policy and direction. • Ensure accurate and timely information is received and communicated to the Governor's Office and other decision makers.

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"> • Evaluate program effectiveness through performance measures, review of best practices, and analysis & comparison of resources to agency goals. • Anticipate problems and issues in state programs; identify alternative solutions which are long-term and effective; develop and submit written recommendations for action(s), and negotiate options with agency heads and other related parties. <p>Lead small group meetings of agency budget directors and other budget staff to discuss current budget issues, provide education and training on processes, and solicit feedback on existing and proposed processes.</p> <p>Advise the Office of the Governor, DAS, the Legislature, and the public regarding assigned state agencies and program areas. Work with Legislative Fiscal Office (LFO) counterparts regularly on ongoing topics related to agency operations.</p> <p>Respond to inquiries from the Governor, Legislature, and other parties on issues related to statewide policy and budget.</p>
30%	R	E	<p>Policy and Budget Development</p> <p>Perform fiscal analysis and develop proposals for assigned policy and program areas. Recommend legislation, review proposed fee change requests, and fiscal policy for assigned areas, as well as participate in discussions for statewide fiscal policy changes. Work in the statewide budget system to review agency information, as well as input budget information.</p> <p>Work with agencies to develop the Current Service Level budget, including determining phase in and phase outs, exception requests and other requests from agencies regarding base operations. Analyze agency budget requests and make recommendations for assigned agencies and program areas. Prepare designated portions of the Governor's recommended budget and appropriation bills. This includes, but is not limited to, working with agencies to identify necessary budget proposals and requests, forecasting information (or verifying agency forecasted information), providing recommendations related to package options and identifying appropriate reductions, as well as briefing CFO Leadership and appropriate Governor's Office staff on recommendations proposed. Present Governor's recommended budget information to appropriate Ways and Means Legislative Committees. Prepare legislative budget reports for the Legislative process; this includes communicating the budgetary impacts of the proposed legislation in writing.</p> <p>Individually represent the position of the Governor and DAS during presentations or negotiations with legislators, lobbyists,</p>

			businesses, local and federal government officials, and other interests. Represent DAS on special committees or task forces.
30%	R	E	<p>Policy and Budget Implementation</p> <p>Monitor budget execution for assigned agencies through regular meetings with agency leadership and staff, review of documentation related to ongoing work and implementation efforts for priority programs, and field work with the agency. Help ensure agency efforts meet Governor's management and policy direction.</p> <p>Review agency quarterly allotment plans for approval by determining if appropriate and in line with statutory requirements. Review agency permanent finance plan requests, work with agency on submission, and recommend approval or denial of plans. Review fee requests and provide written analysis to CFO leadership and DAS Director with recommendation for approval. Analyze and prepare recommendations on requests to the Emergency Board and other interim Legislative Committees.</p> <p>Review federal grant application requests submitted by assigned agencies. The review should include ensuring grants are aligned with existing program work, and gaining and understanding of how additional federal funds will impact other fund types in the agency. Upon completion of the review process make recommendations to the Governor's Office and CFO Leadership regarding approval. Communicate approval or denial to apply for grant to agency.</p> <p>Work with Governor's Office staff to develop or review communications documents impacting assigned program areas. Provide budgetary information and background to Governor's Office staff and participate in meetings as requested to serve as the budget expert.</p> <p>Propose and conduct special studies, serve on task forces and committees, and conduct projects on behalf of, and at the request of, the Governor, Legislature, and DAS.</p> <p>The position also may be requested to:</p> <ul style="list-style-type: none"> • Develop expenditure estimate for ballot measures as part of the Fiscal Impact development process or such measures. • Instigate internal continuous improvement exercises for the office of the CFO and agencies as needed or requested. • Participate in developing agency budget instructions and other policy or procedures related to processes of the CFO throughout the biennium.

			<ul style="list-style-type: none"> • Provide support and information to collective bargaining processes as requested. • Support assigned agencies with federal reporting requirements and maintenance of effort analysis.
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 involves frequent contact with executives, management, and staff both internal and external to the organization. It requires working with a variety of people and situations, which requires the incumbent to exercise diplomacy. Confidentiality of information must be maintained at all times. This position requires the ability to work on multiple tasks simultaneously, frequently within short time frames, and interface effectively with business partners. It requires maintenance of tight deadlines and close coordination of a large number of tasks. There can be frequent interruptions, demanding timeframes, and non-traditional working hours. At times, weekend and evening work is required to meet customer demands and department deadlines. This position requires significant use of a computer and video-conferencing. The position requires the use of certain software programs to complete the budget process, such as Excel, Microsoft Word, the Oregon Budget Information Tracking System, etc.

Duties are performed in a hybrid work environment, with in office work required a minimum of two days per week. At times, during peak budget development, this position will be required to work full time in the office. While in the office, there is a cubicle office design resulting in on-going audible distractions. Requires the ability to work for extended times at a computer terminal with frequent use of common office technology, including phones, computers, and copy machines. Work includes long periods of remaining stationary. There are frequent short deadlines and timeframes for vacations may vary due to these deadlines. Occasional travel for meetings may be required and working in excess of normal duty hours.

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 statutes; chapter laws; budget and state finance administrative rules; federal laws and rules; gubernatorial policies; legislative procedures; budget reports; and personnel, contracting, property rules and procedures. Other guidelines for special purposes depending on the issue.

b. How are these guidelines used?

Factors influencing recommendations to the Governor and/or in presenting proposed actions to the Legislature. Information is included in programmatic and financial structures as conditions, limits, opportunities, etc.

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?
Note: If additional rows of the below table are needed, place curser at end of a row (outside table) and hit "Enter".			
Agency heads	In person By telephone Written	Budget and policy issues, issues interpretation, discussion and clarification	Frequently
Legislators and staff	In person By telephone Written	Budget and policy issues, issues interpretation, discussion and clarification	Frequently in session, occasionally out of session
Governor and staff	In person By telephone Written	Budget and policy issues, issues interpretation, discussion and clarification	Frequently
Agency managers	In person By telephone Written	Budget and policy issues, issues interpretation, discussion and clarification	Frequently
Private and public sector advocates	In person By telephone Written	Budget and policy issues, issues interpretation, discussion and clarification	Occasionally
Private and public sector management	In person	Budget and policy issues, issues interpretation, discussion and clarification	Occasionally

SECTION 7. POSITION RELATED DECISION MAKING

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

- Applies management analytical skills to review fiscal policy and budget issues. Inaccurate analytical work and recommendations and/or misrepresentation will result in bad public policy and fiscal decisions by the Division Administrator, Director, Deputy Director, and Governor.
- Approves or disapproves quarterly allotment of agency funds. Provides oversight to allotment process to ensure expenditure patterns match available resources for biennium.
- Interprets the Governor's policy and represents the Governor's position to state agencies, the Legislature, and various stakeholders. Misrepresentation or misinterpretation could substantially reduce the Governor's effectiveness and credibility.
- Interprets data and serves as agency liaison to the Governor and staff. Such advice is critical to ensure effective communication and decision-making.
- Fiscal and Program management decisions are made with respect to assigned state agencies.

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".

MESN Z7012		Quarterly Performance Evaluations	Quarterly	Measure achievement of objectives
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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? 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"/> 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 is subject to a criminal records check, which may require fingerprints. If you are offered employment, the offer will be contingent upon the outcome of a criminal records check (FBI). Any history of criminal activity will be reviewed and could result in the withdrawal of the offer or termination of employment.

You are responsible to promote and foster a diverse and discrimination/harassment-free workplace; establish and maintain professional and collaborative working relationships with all peers and contacts; contribute to a positive, respectful and productive work environment; maintain regular and punctual attendance; perform all duties in a safe manner; and comply with all policies and procedures. Working in a team oriented environment requires participative decision making and cooperative interactions among staff and management. Be aware of Affirmative action and the department's Diversity strategies and goals.

Employee is required to possess and maintain a valid, unrestricted, Oregon Drivers License or to provide an acceptable alternate mode of transportation.

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

Operating Area	Biennial Amount (\$00000.00)	Fund Type
n/a	n/a	n/a

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