



STATE OF OREGON
Oregon Health Authority (OHA)
POSITION DESCRIPTION

Position Revised Date:
12/10/2021
This position is:

Agency: Oregon Health Authority

Division: Fiscal and Operations

☐ New ☒ Revised

- ☒ **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. Effective Date: _____
- d. Position No: TBD
- e. Working Title: Fiscal Analyst
- f. Agency No: 44300
- g. Section Title: Budget Planning & Analysis Office
- h. Employee Name: TBD
- i. Work Location (City — County): Salem, Marion
- j. Supervisor Name: _____
- k. Position: ☒ Permanent ☐ Seasonal ☐ Limited Duration ☐ Academic Year
☒ Full-Time ☐ Part-Time ☐ Intermittent ☐ Job Share
- l. FLSA: ☐ Exempt If Exempt: ☐ Executive ☐ Professional ☐ Administrative
☒ Non-Exempt
- m. 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.

Oregon Health Authority (OHA) is the organization at the forefront of lowering and containing costs, improving quality, and increasing access to health care in order to improve the lifelong health of Oregonians. OHA is responsible for most state health services and for implementing the health care reforms in House Bill 2009. OHA is overseen by the nine-member citizen Oregon Health Policy Board working toward comprehensive health and health care reform in our state.

OHA Vision: A healthy Oregon.

OHA Mission: Ensuring all people and communities can achieve optimum physical, mental, and social well-being through partnerships, prevention, and access to quality, affordable health care. To fulfill OHA's vision and mission, the agency's strategic plan has a single overarching goal: eliminate health inequities in Oregon by 2030.

OHA definition for health equity:

Oregon will have established a health system that creates health equity when all people can reach their full potential and well-being and are not disadvantaged by their race, ethnicity, language, disability, age, gender, gender identity, sexual orientation, social class, intersections among these communities or identities, or other socially determined circumstances.

Achieving health equity requires the ongoing collaboration of all regions and sectors of the state, including tribal governments to address:

- The equitable distribution or redistribution of resources and power; and
- Recognizing, reconciling and rectifying historical and contemporary injustices.

OHA Core Values: Health Equity, Service Excellence, Integrity, Leadership, Partnership, Innovation, and Transparency. Click [here](#) to learn more about OHA's mission, vision and core values.

This position is part of the Chief Financial Officer's Office, which reports to the OHA Director. The CFO's Office is responsible for implementation of the OHA policies, budget, and financial structures of the OHA Legislatively Adopted Budget. It is responsible for the coordination and oversight of all financial and budgetary related matters with federal agencies, state and local government officials, health care providers, and agency partners. CFO staff actively evaluate policy and budget development and implementation activities for impact on health equity.

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:

As a Fiscal Analyst 2, you will provide support to the Budget Planning and Analysis Unit. You will perform a wide range of budget analysis activities, including project management in addition to budget monitoring and activities. Your primary functions will require thorough knowledge of state and federal budgeting and financial processes. You will also support management and staff through budget development, complex forecasting of cost impacts, and by ensuring that programs are supported by sufficient revenues by evaluating expenditures to budget.

In this role, you will be an active participant in policy strategy development including the analysis of financial impacts of proposed policies with focus on health equity. You will provide data that is used to affect the processes in meeting the agency mission and deliver the information to top agency, legislative, executive, and other governmental and non-governmental officials.

Additionally, the programs and budgets are often interrelated throughout the agency. You will need to demonstrate in-depth expertise on the programs and budgets that you oversee.

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.

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

% of Time	N/R/NC	E/NE	DUTIES
15			Prepares and manages a portion of the agency budget and operating plan throughout budget preparation and execution. Prepares the budget in all levels of detail, including support documentation and actual materials for inclusion in the budget. Prepares documentation for presentation to legislative committees, Chief Financial Office (CFO) and Legislative Fiscal Office (LFO). ORBITS team member for coordination of ORBITS input and reconciliation.
15			Coordinates with agency managers and staff to provide fiscal reporting and planning. Interprets state and federal rules and Regulations to support the agency’s goal of addressing health inequities. Coordinates with top managers to execute expenditure and allocation plans consistent with agency policies and goal to eliminate health inequities. Monitors such plans and adjusts plans as necessary to ensure achievement of agency mission, vision and values within available resources. Coordinates department wide trackers for budget monitoring and prep. Prepares analysis and reviews project management cost and benefits. Provide both short- and long-term forecasts and analysis to critically Identify the budget and program constraints and the efficiency and effectiveness of the Agency.
30			Develops and modifies complex databases that provide historical data and forecasting mechanisms. Develops special data extracts, both for ongoing data needs, and to meet one-time analysis demands. Creates special data extracts to analyze alternative policy options. Develops budget and fiscal reporting formats. Develops and updates methods for forecasting expenditures and revenue. Creates systems that monitor the deviation between budgeted and actual service levels. Develops analysis and explains changes in caseloads, costs, and impacts of policy and management changes.

30			Uses analytic techniques to identify issues and conducts fiscal, statistical and quantitative analysis to determine program and fiscal impacts of proposed or implemented policy changes to agency programs. Prepares and reviews fiscal impact statements for legislative concepts and proposed legislation. Identifies and proposes needed changes. Evaluates program fiscal performance, determines causative factors contributing to budget deviations. Develops forecasts and rebalance analysis for presentation to agency executive staff, DAS and LFO analysts.
10			Participate on Health Equity, Diversity and Inclusion efforts (i.e. training, meetings, projects) Other duties or projects as assigned by management.

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 management and staff, financial and executive staff. It requires working with a variety of people and situations, which may occasionally expose the employee to difficult situations requiring diplomacy.

There can be frequent interruptions, demanding timeframes, and occasional overtime needed, especially during budget development and legislative sessions.

This is a hybrid position offering significant work-from-home flexibility. However, the ability to attend mandatory in-person meetings as needed is a non-negotiable requirement. In addition, the employee is expected to be available to work a schedule that provides staffing coverage during the budget team's regular business hours (8am-5pm).

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:

OHA Mission & Core Values

OHA HR Procedures

Shared OHA/DHS HR Policies and Procedures Department of Administrative Services (DAS)

Statewide HR Rules and Policies

State Accounting Manual and SFMS Manual

DAS Budget Instructions

Budget Reports & Support Documents prepared for presentation to the Legislature

Federal Regulations and Manuals - Medicaid, Waivers

Federal Budget Reconciliation Acts

State and Federal laws, Rules, and Regulations

Oregon Revised Statutes (ORS) and Oregon Administrative Rules (OAR)

b. How are these guidelines used?

State Accounting and SFMS manuals are used to analyze and interpret accounting issues for program office staff and to coordinate with accounting staff to assure consistency in accounting documentation. ORS, OAR, Federal Regulations, Manuals, State and Federal laws, rules and regulations related to health care are used to assure compliance in the use of agency funding. Budget Reports and Legislative presentation documents are used to assure that program implementation is consistent with Legislative intent. DAS Budget Instructions are used as guidelines in developing the agency's biennial budget. The guidelines above ensure timeliness, effectiveness, and efficiency. They are also used to ensure programmatic choices operate within the required parameters of state budget and work as a state employee.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

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

Who Contacted	How	Purpose	How Often?
Budget Administrator/Deputy Budget Administrator	In person, phone, electronically	Receive assignments, review ongoing tasks, review products	Daily
Legislative Fiscal Office (LFO) and Department of Administrative (DAS) Chief Financial Office (CFO)	In person, phone, electronically	Receive questions, respond to same, seek clarification, provide products	As needed; varies from daily to monthly
OHA Internal Divisions, Programs/Services Areas and Central Office Managers/Executives	In person, phone, electronically	Coordinate on policy/fiscal matters, advise on fiscal position	Daily
Federal Agencies	In person, phone, electronically	Seek interpretation of rules and statute, respond to reports	As needed
Other State Agencies	In person, phone, electronically	Coordinate policy/fiscal activities, review application of revenues	As needed; varies from daily to monthly
Local Partners	In person, phone, electronically	Address questions, review their intents	As needed; varies from daily to monthly

Other States	In person, phone, electronically	Compare equivalent federally funded programs	As needed
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SECTION 7. POSITION-RELATED DECISION MAKING

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

Decisions revolve around determining most effective ways to use agency resources so as to optimize agency programs. Poor decision-making could result in budget deficits or missed funding opportunities. Meeting deadlines and providing quality work reflects upon the department and how successful the budget unit is viewed by both internal and external partners.

SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

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

Classification Title	Position Number	How	How Often	Purpose of Review
Budget and Fiscal Administrator 1 (prev. was PEM G/H)	38222	In person, phone, electronically	Monthly or as needed	To ensure work is being completed accurately and thoroughly.
Budget and Fiscal Manager 3 (prev. was PEM E/F)	169973 65426	In person, phone, electronically	Daily or as needed	To ensure work is being completed accurately and thoroughly.
Operations & Policy Analyst 4	134439 177327	In person, phone, electronically	Daily or as needed	To ensure work is being completed accurately and thoroughly.
Peers		In person, phone, electronically	Daily or as needed	For peer review which is team policy before management review.

SECTION 9. OVERSIGHT FUNCTIONS

- 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?

Plan work

Assigns work

Approves work

Responds to grievances

Disciplines and rewards

Coordinates schedules

Hires and discharges

Recommends hiring

Gives input for performance evaluations

Prepares and 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.

All positions in OHA require a Criminal Background Check and an Abuse/Neglect Check. Fingerprints may be required.

- Experience interpreting and analyzing state and federal statutes and regulations.
- Ability to determine the impact of changes to state and federal statutes and regulations.
- Strong analytical skills.
- Extensive knowledge of budgeting processes and fiscal analysis to assess and measure equity impacts.
- Outstanding customer service skills for both internal and external customers.
- Ability to demonstrate initiative and independent judgement on an on-going basis.
- Excellent written and verbal communication and presentation skills.
- Willingness to collaborate, share information and contribute to the team's success.
- Experience in promoting a culturally competent and diverse work environment.
- Experience and knowledge in advancing health equity and antiracism.

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

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

Operating Area	Biennial Amount (\$00,000.00)	Fund Type

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