



STATE OF OREGON
Oregon Health Authority (OHA)
POSITION DESCRIPTION

Position Revised Date:
11/15/2021

Agency: Oregon Health Authority

Division: Fiscal & Operations

☐ 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: Fiscal Analyst 3
- b. Classification No: C1245 c. Effective Date: _____
- d. Position No: 2730589
- e. Working Title: Senior Fiscal Analyst
- f. Agency No: 44300
- g. Section Title: Budget Planning & Analysis
- h. Employee Name: _____
- i. Work Location (City — County): Salem, Marion
- j. Supervisor Name: Jennifer Van Dyke
- 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 Senior Fiscal Analyst, you will provide fiscal and budget advice to the Budget Planning and Analysis Unit of the Fiscal Operations Division and management. You will perform a wide range of budget analysis, including project management, fiscal and budget advice, budget developing, monitoring, tracking, and making budget adjustments, and other policy and budget activities. Your primary functions will require thorough knowledge of state and federal budgeting and financial processes and systems. 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. You will analyze large and complex 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.

Besides applying these technical and analytical skills, this position participates in policy strategy development with program management and agency leadership. In support of the agency’s goal to eliminate health inequities by 2030, this position analyzes budgets, programs, and proposals with a focus on identifying potential impacts to that goal and coordinating research for further policy consideration.

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
25	N		Develops and monitors large and complex program budgets: • Participates in policy strategy development with management and program staff, supporting the agency’s goal of addressing health inequities. • Research policy proposals to calculate budget impacts and identifying potential impacts on health inequities. • Develops biennial budget models to track expenditures against projections and budget. • Develops monthly financial reports from budget models and expenditure and revenue data. • Prepares documentation for budget development: Calculates and documents essential packages for Current Service Level (CSL), Policy Option Packages (POPs) and reductions options for Agency Request Budget (ARB), Governor’s Budget (GB) and Legislatively Adopted Budget (LAB) updates and Rebalance adjustments. • Prepares documentation for presentation to legislative committees, Chief Financial Officer (CFO) and Legislative Fiscal Office (LFO). • Explains and defends agency plans to Department of Administrative Services, CFO and LFO analysts.
25	N		Provides budget and fiscal consultation, advice, and coordination with agency leadership, program managers and staff: • Advises and trains on budget and fiscal processes including their limitations, regulations, and rules.

			• Collaborates in strategy and problem-solving discussions. • Provides guidance in evaluating available resources. • Develops and shares modeling of budget impacts of program changes and strategies. • Provides guidance through biennial budget build process. • Provides analyses of budget modeling that include: the fiscal impact by fund type (e.g., state funds, other funds, federal funds); areas of concern related to budget, operational feasibility, program need; the agency's goal to eliminate health inequities; and recommendations for improvement. • Interprets state and federal rules and regulations. • Coordinates with agency managers and staff to provide fiscal reporting and planning. • Proposes policy alternatives and fiscal impacts as a mechanism to achieve program goals, consistent with fiscal limitations, regulations, and rules. • Coordinates with top managers to develop expenditure and allocation plans consistent with agency policies. • Monitors such plans and adjusts plans as necessary to ensure achievement of agency mission 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. • Provides operational guidance and coordination for budget and policy implementation.
20	N		Performs complex budget and fiscal analysis: • Develops and modifies complex databases that provide historical data and forecasting mechanisms. • Creates data extracts for fiscal analysis, for both ongoing and one-time needs. • Integrates data into fiscal reports for budget monitoring. • Analyzes data for trends to develop projections for expenditures and revenue. • Analyzes data to identify and isolate budget and program issues.

			• Uses data to problem-solve, analyze policy options, and make program advice and recommendations. • Utilizes technological automation solutions for modeling to the greatest extent possible to allow more time for analysis. • Develops forecasts and rebalance plans for presentation to agency executive staff, DAS and LFO analysts. • Develops budget and fiscal reporting formats and method for complex budget forecasting. • Creates systems that monitor the deviation between budgeted and actual service levels. • Develops budget analysis and explains changes in caseloads, costs, and impacts of policy and management changes. • Completes Fiscal Impact Statements (FIS) for Legislative Concepts (LCs) and proposed legislation with consideration of budget impacts related to health equity. • 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. • Evaluates program fiscal performance, determines causative factors contributing to budget deviations.
10	N		Provides legislative fiscal and policy analysis, with focus on health equity: • Reviews and analyzes proposed legislative concepts and proposed legislation. • Researches and interprets state and federal rules and regulations associated with legislative proposals. • Review program analyses of legislative proposals. • Calculate fiscal impact by pulling data, analyzing trends, forecasting expenditures, modeling funding splits, and other factors to estimate projected budget need. • Identify policy, regulatory, system, or other operational issues associated with legislative proposals. • Identify needed changes to proposals and make recommendations to achieve desired outcome. • Identify impact of legislative proposals to agency's goal to eliminate health care disparities and make

			recommendations to improve proposals towards meeting that goal.
5	N		Training: - Provides budget and fiscal analyst training to colleagues for cross training. - Trains program partners on budget build process, budget/fiscal reporting, and the development of fiscal impact statements. - Attends mandatory statewide, agency, division, and unit trainings and meetings, including any available opportunities approved for the State Diversity Conference. - Attends voluntary training opportunities with management approval.
5	N		Complies with fiscal controls, accounting practices and state budget and audit standards: - Evaluates the effectiveness of budget and fiscal reporting processes against required standards. - Ensures budget documents, models and reports are produced, stored, and retained systematically for management oversight and audit. - Identifies and directs changes to fiscal systems and processes to improve budget and fiscal reporting.
10	N		- 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 position may be performed remotely or in a hybrid arrangement. While the responsibilities of this role are well suited to remote work, periodic in person expectations will be tied to identified work needs and addressed in alignment with applicable policies and the reasonable accommodation process.

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 of Monday through Friday, 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)
Budget Planning & Analysis (BPA) team policies
Desk procedures which apply to BPA

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?
Deputy Budget Director, 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	In person, phone, electronically	Receive questions, respond to same, seek clarification, provide products	As needed; varies from daily to monthly

Services (DAS) Chief Financial Office (CFO)			
OHA Internal Divisions, Programs/Services Areas and Central Office Managers/Executives	In person, phone, electronically	Coordinate on policy/fiscal matters, present service alternatives, 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, advise on policy, review their intents	As needed; varies from daily to monthly
Other States	In person, phone, electronically	Compare equivalent federally funded programs	As needed

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
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Budget and Fiscal Administrator 1 / 2	1013908 4065330 1000047	In person, phone, electronically	As needed	To ensure work is being completed accurately and thoroughly.
Budget and Fiscal Manager 3	1410015 0134404	In person, phone, electronically	As needed	To ensure work is being completed accurately and thoroughly.
Peers		In person, phone, electronically	Daily	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 | ☐ Coordinates schedules |
| ☐ Assigns work | ☐ Hires and discharges |
| ☐ Approves work | ☐ Recommends hiring |
| ☐ Responds to grievances | ☐ Gives input for performance evaluations |
| ☐ Disciplines and rewards | ☐ 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
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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