



STATE OF OREGON
Oregon Health Authority (OHA)
POSITION DESCRIPTION

Position Revised Date:
02/06/2025

Agency: Oregon Health Authority

Division: Fiscal and 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: Operations & Policy Analyst 4
- b. Classification No: MMN X0873 c. Effective Date: _____
- d. Position No: _____
- e. Working Title: Senior Fiscal and Budget Analyst Lead
- f. Agency No: 44300
- g. Section Title: Budget Planning & Analysis Office
- 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.

The OHA mission is helping people and communities achieve optimum physical, mental and social well-being through partnership, prevention and access to quality, affordable health care. OHA's work is organized into three broad goals: Improve the lifelong health of all Oregonians, increase the quality, reliability and availability of care for all Oregonians and lower or contain the cost of care so it is affordable to everyone.

OHA values service excellence, leadership, integrity, health equity and partnership.

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.

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:

This position provides fiscal, financial, and budget advice to the Budget Planning and Analysis Unit of the Fiscal Operations Division and Chief Financial Officer's Office and will perform a wide range of complex and large budget analysis and forecasts, including project management, fiscal and budget advice, policy advice, budget development, and monitoring and tracking activities, which will have an impact across other state agencies and partners (i.e. ODHS, DCBS, DOR, DAS, LFO, CMS, Counties in Oregon, and diverse communities across the state). This position is required to have thorough knowledge of state and federal budgeting and financial processes and systems (i.e., SFMA, MMIS, ORBITS, OBBIE, Workday systems, etc.) as well as policy development of new programs and services such as the implementation of the 1115 Oregon Health Plan Waiver and other large health care programs. This position will also support management, leadership, and staff through budget development, complex forecasting of cost impacts, and by ensuring that programs are supported by sufficient revenues.

This position will be an active participant in policy strategy development including the analysis of financial impacts of proposed policies with different division across OHA and other state and federal agencies and county jurisdictions to implement some health care programs as well as with different communities and health care providers across the State of Oregon. Analyzes large and complex data sets to create fiscal impacts and perform research with other state's health providers and work with program and operations leadership and managers to lead and advice budget requests for policy development and to focus agency efforts in meeting the agency's

mission of reaching Health Equity goal. This position will analyze budgets, programs, and proposals with a focus on identifying potential impacts to that goal and coordinating research for further policy consideration to be more inclusive of our populations and communities we serve in the State of Oregon.

This position will also interact with multiple audiences and stakeholders and partners in the legislative, executive, and other governmental and non-governmental officials as well as with the federal government (CMS) and other jurisdictions and communities across the State of Oregon. Additionally, the programs and budgets are often interrelated and complex throughout the agency and across the state enterprise and this position will demonstrate in-depth technical expertise in budget and programs as well as soft skills in leadership, communication, problem-solving, critical thinking, innovation, and decision-making.

Besides applying these technical, analytical expertise, and soft skills, this position will also support the agency's goal to eliminate health inequities by 2030. The person in this role will analyze budgets, programs, and proposals with a focus on identifying potential impacts to that goal and coordinating research for further policy consideration to be more inclusive of our populations and communities we serve in the State of Oregon.

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
30	R	E	<u>Provides budget and fiscal consultation, advice, and coordination with agency leadership, program managers and staff and across other state agencies:</u> • Provides fiscal and budget advice to leadership and managers on different programs and services across different divisions and other state agencies including limitations, exceptions, rules, and regulations as it relates to budget. • Collaborates in decision making and problem-solving discussions using a resolution-oriented approach. • Provides advice and guidance in evaluating available resources and budgets across divisions and other state agencies that collaborates with OHA. • Develops and implement modeling of budget impacts of program changes and strategies. • Provides guidance through biennial budget build process and work across divisions and/or other state agencies to align budget and processes. • 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 as it relates to budget. • Coordinates with agency leadership teams across divisions to provide fiscal reporting and planning. • Proposes policy alternatives and fiscal impacts across different divisions or state agencies as a mechanism to achieve program goals, consistent with fiscal limitations, regulations and rules. • Coordinates with leadership and top managers to develop expenditure and allocation/spend 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 of 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.
25		E	<u>Budget leadership and advice:</u> • Advises the Budget Administrator, Deputy Budget Administrator, Budget Director, Chief Financial Officer, DAS LFO and CFO, by developing, writing, and coordinating official budget documents, presentations, and displays. Assist with the development of the Agency Request Budget document, Governor's Budget document, Ways and Means Budget document, Ways and Means presentation slides, budget rebalance documents and presentation slides. • Provides direction and instructions to budget staff and division leadership on requirements, guidance, and deadlines for specific budget development activities. • Coordinate budget activities across OHA divisions, other state agencies (ODHS, DOR, DCBS, etc.), the federal government agencies, DAS LFO/CFO, and other partners and stakeholders. Assist with the coordination of budget activities with the Department of Administrative Services and the Legislative Fiscal Office. • Draft budget and program narratives, graphs, displays, and presentations for OHA leadership and the Governor's Office. Direct budget staff across the agency to gather and produce information necessary to produce budget and program documents.

			• This position will support the Budget Team by making decisions, resolving issues, and responding to questions from inside and outside the agency in consultation with managers. • Build and maintain OHA Budget work plan, which includes time for OHA leadership review and approval of deliverables, to ensure OHA successfully completes budget deliverables timely. Communicate work plan with OHA divisions and leadership. Ensure division budget staff are successfully tracking to timelines. • Plan budget improvement projects by recommending project budget plans, including but not limited to: cost saving strategies, spending plans, risk identification and mitigation strategies and recommendations based on project impact to the agency. • Use LEAN principles/Process Improvements, and project management principles to improve workflow and monitor status of major budget activities throughout the budget-build cycle.
10	N	E	<u>Provides legislative fiscal and policy analysis with focus on Health Equity:</u> • Performs review of fiscal impact statement for Budget Team as required. • Reviews and analyzes proposed legislative concepts, policy option packages, and other 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.
25	R	E	<u>Develops and monitors large and complex program budgets:</u> • 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. • 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 analysis and explains changes in caseloads, costs, and impacts of policy and management changes. • 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. • Liaison between OFS and Budget Teams for budget and accounting related activities (biennium-end closing activities, DCR/SCR structures, accruals, etc.) • Perform reviews of fiscal impact statements, fiscal pricings/models, projections and forecasts for Budget staff and managers. • Provide legislative training to budget staff and perform review of fiscal impact statement for the Budget Team during legislative sessions. Review and evaluate proposed legislation, bill analyses and supporting fiscal impact documentation. Coordinate and direct staff to complete fiscal impact statements according to internal processes.
10	R	E	• Define system requirements through collaboration with internal (OHA) and external (DHS, Shared Services, legislative fiscal office, DAS, legislature) customers to assist in the budgeting process. Develop specifications that drive large policy or fiscal decisions. • Develop and provide budget and systems training for new budget staff. • Create and maintain policy and procedures and any budget resource materials and tools for budget staff.

			• Provides training to budget and fiscal analyst, partners and stakeholder on budget build process, budget/fiscal reporting, and the development of fiscal impact statements. • Attends mandatory statewide, agency, division, and unit trainings and meetings. • Other duties or projects as assigned by management.
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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, patience and empathy.

Occasionally travel to meetings and trainings is required.

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

This position will be hybrid. Both remote work and physical in office work as required by this role during legislative sessions, budget development process, training and presentations, etc.

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?
Medicaid and Behavioral Health 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 Services (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
Program and Central Office Managers	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
Office of Financial Services (OFS)	In person, phone, electronically	Coordinate on policy/fiscal matters	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:

This position performs policy and budget analysis and advises OHA management and leadership across divisions and other state agencies on decisions that have long term effects on agency resources and its overall financial status. The decisions that are made by the incumbent in this position include large-scale budget, fiscal and policy decisions. This includes implementing budget decisions by coordinating with staff, fiscal impact decisions, etc.

This position uses high level professional judgment to determine the significance and sensitivity of decisions that need to be escalated and consulted with Budget management and Leadership team.

This position works with Medicaid and Behavioral Health Budget Teams, divisions program leadership, Budget Director and across the agency directors and with other state agencies, DAS CFO/LFO, OHA External Relations to research, direct and coordinate activities with budget and finance staff to gather data for media and stakeholder inquiries. This position uses high level professional judgment to determine the needed data and for drafting the talking points or narrative to describe data results.

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 Manager 3	1410015	In person, phone, electronically	Daily	To ensure work is being completed accurately and thoroughly.
Budget and Fiscal Administrator 1	1000047	In person, phone, electronically	As needed	To ensure work is being completed accurately and thoroughly.

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 and critical and innovative skills.
- Extensive knowledge of budgeting processes.
- 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 as well as advancing health equity.

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