



STATE OF OREGON  
POSITION DESCRIPTION

Position Revised Date:

Agency: Oregon Housing & Community Services

Section: Chief Financial Office

X New ☐ Revised Workday ID: 000000014574

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 3	b. Classification No:	C1245
c. Effective Date:	10/17/2023	d. Position No:	0001033
e. Working Title:	Budget Analyst	f. Agency No:	91400
g. Section Title:	Budget	h. Budget Auth No:	828630
i. Employee Name:		j. Repr. Code:	OAS
k. Work Location (City – County):	Salem-Marion NMOB		
l. Supervisor Name:			
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	If Exempt: <input type="checkbox"/> Executive <input type="checkbox"/> Professional <input type="checkbox"/> Administrative	o. Eligible for Overtime: <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 Housing & Community Services (OHCS) provides stable and affordable housing and engages leaders to develop integrated statewide policy that addresses poverty and provides opportunity for Oregonians. OHCS's vision for the state is that all Oregonians have the opportunity to pursue prosperity and live free from poverty.

The Budget Section is in the Chief Financial Office. They deliver budgetary and fiscal monitoring for all aspects of the agency to support the agency to achieve its mission and in reaching its goals.. This work is critical to this success to ensure resources reach low-income Oregonians.

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 professional, high-quality, efficient, calm, and confidential decisions, and support to ensure the continuity, coordination, and execution of the agency's operations. This position reports directly to the Budget Manager and serves as a key liaison to the Legislative Fiscal Office and the Department of Administrative Services' Chief Financial Office.

This position carries out the goals and objectives of OHCS through the formulation, development, execution, and monitoring of the Department's biennial budget. The position is responsible for the preparation of fiscal analyses of proposed legislation affecting the agency; facilitating and coordinating position management and budget development efforts with program areas; overseeing the collection and creation of necessary budget back up documentation and reporting; ensuring the timely preparation and compilation of the Agency Request Budget, the Governor's Recommended Budget, and the Legislatively Adopted Budget documents; and, the collection and analysis of fiscal information.

In addition to the development of the agency-wide budget, this position is responsible for assisting managers in the development, evaluation, and analysis of programs and activities; oversight of the preparation of allotment plans to ensure adequate spending authority on program expenditures; monitoring budget execution for compliance with state and federal requirements; and proposing corrective action when required.

### 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
<b>Note:</b> If additional rows of the below table are needed, place cursor at end of a row (outside table) and hit "Enter".			
45%	N	E	<u><b>Budget Development</b></u> <ul style="list-style-type: none"> <li>Manages and coordinates the development of the agency budget for agency request, governor's recommended, and legislatively adopted.</li> <li>works with managers on budget proposals (section budgets).</li> <li>analyzes feasibility of and prepares policy option packages that reflect request for resources that are necessary to accomplish agency long-term goals and financial initiatives.</li> <li>serves as principal advisor in determining long range revenue projections.</li> <li>develops reduction options and fiscal adjustments that are necessary to stay in line with projected revenues and financial policy.</li> <li>coordinates the inclusion of performance measurement information.</li> <li>writes budget narratives that reflect agency needs, goals, and objectives.</li> <li>Works with agency managers to analyze changes in programs and/or resources to ensure agency needs and program goals are met.</li> <li>Develop budget presentations and justify budget requests.</li> <li>Completes and analyzes detailed agency revenue projections and determines necessary fiscal adjustments to the Department's expenditure activity.</li> </ul>

			<ul style="list-style-type: none"> <li>• Evaluates various program functions and explains where adjustments can be made that have positive impacts on revenues and cost.</li> <li>• Works with DAS Budget Analyst and LFO Budget Analyst to resolve budget issues, possibly on holidays, weekends, and evenings during legislative sessions.</li> <li>• Reviews of legislative concepts and proposed legislation to determine fiscal impacts. Responds to questions from Legislative Fiscal Office, possibly on holidays, weekends, and evenings.</li> <li>• Upon review, recommends to management fiscal impact statements. Inform the Government Relations team, managers, and Executive Team about costly or controversial impacts when necessary.</li> <li>• As necessary, testifies to legislature on fiscal impacts related to proposed legislation.</li> <li>• Develops and make presentations to staff of the Department of Administrative Service Budget and Management Division and the Legislative Fiscal Office.</li> <li>• On occasion, it presents budgetary analysis information to agency executive staff, and other external groups (legislature, business partners, financial advisors etc.</li> </ul>
30%	N	NE	<p>Budget Implementation and Coordination</p> <ul style="list-style-type: none"> <li>• Provides oversight into the agency budget management system to ensure that management is held accountable for section budgets, and that programs are within budgetary limitations. This includes taking responsibility of agency approved budget and making decisions and directing agency staff in accordance with executive committee policy.</li> <li>• Ensure that appropriate fiscal adjustments are made to section and program budgets.</li> <li>• Develop policy and procedures for budget monitoring based on needs of agency and enforces all budget policy to ensure that managers are following correct budget practice.</li> <li>• Works with managers to resolve budgetary issues for both section and program budgets and adjusts budgetary processes and guidelines, as necessary, to ensure that programs with special needs are accommodated.</li> <li>• Modifies budgetary policies, processes and guidelines to assist programs in meeting changed goals or objectives.</li> <li>• Monitors statewide budgetary policy changes and ensure operational needs are adjusted to meet policy intent.</li> <li>• Assists with the development and submittal of the quarterly allotment plan, which includes making decisions on budgetary expenditure patterns and revenue forecasting and working with the Department of Administrative Services to approve the agency quarterly spending plan.</li> <li>• Completes detailed analysis of the agency budget plan that forecasts short range and long-range spending plans; makes decisions on adjustments to plan; recommends spending plan to executive committee; compares actual information to forecasts: and establishes and enforces budget policy that reflects any adjustments to budget plan.</li> <li>• Coordinate with the Budget Manager and agency Cost Accountant to ensure that the Department follows the guidelines</li> </ul>

			<p>of the agency cost accounting plan, makes any necessary adjustments to the plan, provides reports on program costs, and creates a database of information related to program cost.</p> <ul style="list-style-type: none"> <li>• Completes analysis and provides Controller with up-to-date information on budget limitation status, and revenue trends, which includes working with program staff and analyzing revenue, including forecasting and expenditure patterns.</li> <li>• Assists with Emergency Boards requests by preparing letters, performing financial analysis, preparing presentations, ensuring staff follow proper policy and procedures, and, as necessary, presents budgetary and financial data to the legislature.</li> <li>• Prepares documentation for budget and position changes related to interim actions affecting the agency budget and submits them to the Department of Administrative Services.</li> <li>• Supports position management by reviewing budgeted to actual position classes, discussions with Human Resources staff and managers, and prepares permanent finance plans when necessary.</li> </ul>
15%	N	E	<p><b><u>Program Review and Analysis</u></b></p> <ul style="list-style-type: none"> <li>• Develop internal analysis to include program, admin, and section analysis to monitor against execution per each biennium.</li> <li>• Provide actuals against estimates and monitor quarterly</li> <li>• Meet with program staff to monitor actuals to budget</li> <li>• Report to budget manager issues on subsidization and funding flows.</li> </ul>
10%	R	E	<p><b><u>Other Duties</u></b></p> <ul style="list-style-type: none"> <li>• Presents and interprets information within and external to the agency.</li> <li>• Performs analysis and develops reports on external data to provide the Budget Manager, Controller, Executive Team and others with better decision-making tools</li> <li>• Other duties as assigned.</li> </ul>
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 has a typical office cubical environment This position may be available for remote work using Teams or Zoom. Numerous frequent short deadlines. This position may involve occasional travel on official state business.

## SECTION 5. GUIDELINES

- List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.**

- Oregon Budget Information Tracking System (ORBITS) Manual
- Oregon Position Information Control System (ORPICS) Manual
- Oregon Accounting Manual
- OHCS Administrative Rules
- OHCS Policies and Procedures
- Oregon Revised Statutes related to OHCS
- Statewide Financial Management System Manual
- Department of Administrative Services Rules and Regulations

**b. How are these guidelines used?**

Developing and implementing policies and procedures to ensure compliance with pertinent guidelines for budget management.

## 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>			
DAS Budget and Management, Financial Advisors, Auditors, Other State Agencies, Attorneys and Budget Analysts	Phone, in person, remotely and e-mail	To discuss and examine financial budgetary related issues, policies and procedures, and resolve problems	Weekly/Daily
LFO/CFO	Phone, in person, remotely and email	Resolve questions from LFO/CFO	As needed
Agency Staff	Phone, in person, remotely and email	Resolve problems as noted; receive advice and interpretations	As needed

## SECTION 7. POSITION RELATED DECISION MAKING

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

This position makes decisions and recommendations that impact policies, programs, business processes, and available resources within OHCS. This position will make decisions about budget policy and procedures and take appropriate steps to ensure that all staff are complying.

This position makes leadership decisions, which affect employee morale, and the accounting records of the Oregon Housing and Community Services Department and the state of Oregon.

This position provides leadership and decision making in the development and implementation of the Department's biennial budget. Incorrect decision making can result in the misrepresentation of agency revenues and expenditures and increase the risk to the Department's ability to provide the necessary resources to low-income families, housing developers, and other partners.

This position interprets generally accepted accounting principles and applies these interpretations to the Department's financial systems. Incorrect applications can misstate financial information, resulting in audit findings, and the impairment the Department's bond ratings and to the ratings of the State of Oregon.

This position reviews various programs to determine financial risks and makes decisions on the best course of action to eliminate the risk. What course of action chosen is determined by the Budget Manager and Controller in accordance with recommendations made by this position. Decisions will be made by this position regarding the type of financial analysis or data that is necessary to provide program managers or the Budget Manager/Controller with the most meaningful information.

## 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>				
BFM1	0002015	Written performance review; quality control review, In person, remotely	Annual, Quarterly, as needed	Performance evaluation and to provide feedback. Ensure accurate and timely completion of budget activities.

## SECTION 9. OVERSIGHT FUNCTIONS

THIS SECTION IS FOR SUPERVISORY POSITIONS ONLY

a. How many employees are directly supervised by this position? \_\_\_\_\_

How many employees are supervised through a subordinate supervisor? \_\_\_\_\_

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:

The individual in this position must perform position duties in a manner which promotes customer service and harmonious working relationships, including treating all persons courteously and respectfully; actively engage in and promote a positive work environment; develop good working relationships with agency personnel and with appropriate external partners; identify and resolve problems in a constructive manner; demonstrate openness of constructive feedback and suggestions; and contribute to a positive, respectful, and productive work atmosphere creating a positive, productive environment focused on results.

This position must pass a criminal records check.

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

Operating Area	Biennial Amount (\$00000.00)	Fund Type
<b>Note:</b> If additional rows of the below table are needed, place curser 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