



DUTY STATEMENT

Department of Finance
Human Resources Office

The Department of Finance's mission is to serve as the Governor's chief fiscal policy advisor and to promote long-term economic sustainability and responsible resource allocation.

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|-----------------------|-------------------------------------|------------------------|------------------|
| NAME | | EFFECTIVE DATE | Month, Day, Year |
| UNIT | | POSITION NUMBER | 300-XXX-5271-XXX |
| CLASSIFICATION | Principal Program Budget Analyst II | | |
| SCOPE | | | |

Serves as the Department of Finance's primary contact with one or more departments; develops expert fiscal and program knowledge in assigned area; identifies policy and program issues on which program analysis projects should be initiated; works with the department(s) to which assigned in preparation of the Governor's Program Budget; consults with line program managers regarding program; advises the Director of Finance and Governor's Office on decisions relating to the program budget and proposed legislation; has final authority to approve a wide range of financial documents that require Department of Finance approval; carries out program analysis projects, using a variety of analytical techniques to evaluate program effectiveness and program alternatives; serves as a resources person in assigned program area to assist other staff conducting program analyses; monitors program implementation; and represents the Department of Finance at subcommittee hearings of appropriate committees.

Positions are allocated at this level based on an evaluation of the assignment and incumbent in terms of the criteria discussed under Allocation Factors. Allocation at this level represents the acknowledged fully qualified level of principal responsibility. Assignments are typically to a department, group of departments, or agency which currently have an average range of sensitive programs, moderately complex expenditure patterns, have a significant impact on the State's fiscal resources, including important policy on program issues, and deal with programs that are undergoing redefinition or redirection. The incumbent generally has been associated with the assignment to an extent sufficient to provide accepted expertise in the program areas, and she/he makes major contributions to the decision-making process, which are widely accepted within the administration and the Legislature.

ESSENTIAL FUNCTIONS

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| 50% | <p><u>SUPERVISION</u></p> <ul style="list-style-type: none"> • Review the work of subordinates. • Action (approval, denial, other) on the recommendation of subordinates where authority is retained (not delegated to subordinates). • Provide training, mentoring, and coaching to subordinates. • Provide ongoing feedback, both formal and informal (e.g., evaluations). • Development of work assignments for subordinates. Interpretation of assignments from supervisory levels and coordination of input from subordinates. • Is responsible for the supervision of analyses, computer simulations and modeling of finance issues involving complex formulas. |
| 15% | <p><u>BUDGET DEFENSE AND REPRESENTATION</u></p> <ul style="list-style-type: none"> • Communicate budget changes and rationale for changes to the Legislative Analyst's Office, Legislative Consultants, the press, and stakeholders. • Presents the Governor's Budget and represents it before legislative committees. • Makes recommendations for veto and writes veto messages for the Governor. |

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| 15% | <p><u>POLICY DEVELOPMENT AND ISSUE ANALYSIS</u></p> <ul style="list-style-type: none"> • Through daily contact with programs, the principal can identify problems or potential problems early. The principal makes recommendations regarding the administration of programs and exercises initiative to correct matters where the principal has authority and where appropriate. The principal identifies problems for action by the Director of Finance and Governor's Office where appropriate. • The principal responds to issues raised by the Administration and provides program and policy analysis as well as fiscal analysis and financial information where appropriate. The response may be immediate when the information is known and the issue small or the principal may be called on to investigate the issue, develop information and prepare a complete written analysis. • Represents the Administration before public or private interest groups and agencies, or on policy task forces, etc. |
| 10% | <p><u>LEGISLATION AND REGULATION</u></p> <ul style="list-style-type: none"> • Analyze legislation for fiscal effects (identify state costs, local mandated costs, revenue effects, etc.). Make recommendations for the Administration to take a position on the legislation. Meet with legislative staff and Legislators regarding fiscal analysis, identifying and/or proposing amendments where necessary. • Analysis of significant issues where statutes are responsible for problems or where problems need statutory change. Development of legislation and proposals for the Administration. • Makes recommendations for veto and writes veto messages for the Governor. |
| 10% | <p><u>BUDGET PREPARATION</u></p> <ul style="list-style-type: none"> • Develop Finance Budget Change Proposals. Develop policy issues, analyze, and make recommendations. • Review Departmental Budget Change Proposals. Analyze, develop written analysis, identifying issues, alternative, consequences, and make recommendations. • Prepare written analysis and make oral presentations regarding analysis and recommendations to the Program Budget Manager and Director of Finance. Defend analysis and recommendations against Directors, Agency Secretaries and Constitutional Officers. |
| <u>SPECIAL REQUIREMENTS</u> | |
| <ul style="list-style-type: none"> • Willingness as a learner to do routine or detailed work in order to learn the practical application of administrative principles. • Demonstrated capacity for development as evidenced by work history, academic attainment, participation in school or other activities, or well-defined occupational or avocational interests. • Willingness and ability to accept increasing responsibility. | |

KNOWLEDGE, SKILLS, AND ABILITIES

The incumbent is required to possess the following knowledge:

- Principles, practices, and trends of governmental budgeting and accounting
- Research techniques
- Program budgeting techniques and governmental functions and organization
- Methods and techniques of effective program management and supervision
- The legislation process and its impact on program selection and budgeting
- A manager's/supervisor's responsibility for promoting equal opportunity in hiring and employee development and promotion, and for maintaining a work environment that is free of discrimination and harassment.

The incumbent is required to possess the following skills and abilities:

- Reason logically and creatively and utilize a variety of analytical techniques to resolve complex governmental budgeting and managerial problems.
- Develop expertise on the subject matter administered by the department or departments to which assigned.
- Develop and evaluate program alternatives; analyze data and present ideas and information effectively.
- Consult with and advise administrators or other interested parties.
- Appear before legislative and other committees and testify on behalf of the Department of Finance and the administration on fiscal and program-related matters for either revenues or expenditures.
- Use techniques such as model building and simulation, formulating assumptions and identifying constraints, estimating market demand in the public sector, allocation of limited resources, risk and uncertainty, systems analysis, problem formulations, price incentives, and comprehensive program monitoring, evaluation, and control.
- Gain and maintain the confidence and cooperation of those contacted during the course of work; coordinate the work of others.
- Act as a team or conference leader
- Effectively promote equal opportunity in employment and maintain a work environment that is free of discrimination and harassment.
- Emulate the department's core values

SIGNATURES

I have read and understand the duties listed above and I can perform these duties with or without reasonable accommodation. (If you believe reasonable accommodation is necessary, discuss your concerns with the hiring supervisor. If unsure of a need for reasonable accommodation, inform the hiring supervisor, who will discuss your concerns with the assigned HR analyst.) I also acknowledge, under certain circumstances, I may be required to physically come into the office at any time within a reasonable amount of time.

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| EMPLOYEE SIGNATURE | | DATE | |
| I certify this duty statement represents a current and accurate description of the essential functions of this position. I have discussed the duties of this position and have provided a copy of this duty statement to the employee named above. | | | |
| SUPERVISOR NAME | | | |
| SUPERVISOR SIGNATURE | | DATE | |
| PROGRAM BUDGET MANAGER (PBM) NAME | | | |
| PBM SIGNATURE | | DATE | |



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| NAME | | EFFECTIVE DATE | Month, Day, Year |
| UNIT | | POSITION NUMBER | 300-XXX-5273-XXX |
| CLASSIFICATION | Principal Program Budget Analyst III | | |
| SCOPE | | | |

Serves as the Department of Finance's primary contact with one or more departments; develops expert fiscal and program knowledge in assigned area; identifies policy and program issues on which program analysis projects should be initiated; works with the department(s) to which assigned in preparation of the Governor's Program Budget; consults with line program managers regarding program; advises the Director of Finance and Governor's Office on decisions relating to the program budget and proposed legislation; has final authority to approve a wide range of financial documents that require Department of Finance approval; carries out program analysis projects, using a variety of analytical techniques to evaluate program effectiveness and program alternatives; serves as a resources person in assigned program area to assist other staff conducting program analyses; monitors program implementation; and represents the Department of Finance at subcommittee hearings of appropriate committees.

Positions are allocated at this level based on an evaluation of the assignment and incumbent in terms of the criteria discussed under Allocation Factors. Assignments are only to those departments, groups of departments, or agencies which currently represent the most sensitive and complex programs and that have a major impact on the State's total fiscal resources. Typically, the assignments include policy-influencing recommendations in dynamic and controversial program areas. The incumbent brings an expertise to the assignment gathered over a period of association with the programs involved. She/he is alert in recognizing significant issues and creative in generating alternative solutions. She/he has considerable influence on the decision-making process and is respected for his/her knowledge, analytical ability, and judgment by the administration and the Legislature.

ESSENTIAL FUNCTIONS

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| 50% | <u>SUPERVISION</u> |
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| | <u>POLICY DEVELOPMENT AND ISSUE ANALYSIS</u> |
| 15% | <ul style="list-style-type: none"> • Through daily contact with programs, the Principal can identify problems or potential problems early. The Principal makes recommendations regarding the administration of programs and exercises initiative to correct matters where the Principal has authority and where appropriate. The analyst identifies problems for action by the Director of Finance and Governor's Office where appropriate. • The Principal responds to issues raised by the Administration and provides program and policy analysis as well as fiscal analysis and financial information where appropriate. The response may be immediate when the information is known and the issue small or the Principal may be called on to investigate the issue, develop information and prepare a complete written analysis. • Represents the Administration before public or private interest groups and agencies, or on policy task forces, etc. |
| 10% | <u>LEGISLATION AND REGULATION</u> <ul style="list-style-type: none"> • Analyze legislation for fiscal effects (identify state costs, local mandated costs, revenue effects, etc.). Make recommendations for the Administration to take a position on the legislation. Meet with legislative staff and Legislators regarding fiscal analysis, identifying and/or proposing amendments where necessary. • Analysis of significant issues where statutes are responsible for problems or where problems need statutory change. Development of legislation and proposals for the Administration. • Makes recommendations for veto and writes veto messages for the Governor. |
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- Develop and evaluate program alternatives; analyze data and present ideas and information effectively.
- Consult with and advise administrators or other interested parties.
- Appear before legislative and other committees and testify on behalf of the Department of Finance and the administration on fiscal and program-related matters for either revenues or expenditures.
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| EMPLOYEE SIGNATURE | | DATE | |
| I certify this duty statement represents a current and accurate description of the essential functions of this position. I have discussed the duties of this position and have provided a copy of this duty statement to the employee named above. | | | |
| SUPERVISOR NAME | | | |
| SUPERVISOR SIGNATURE | | DATE | |
| PROGRAM BUDGET MANAGER (PBM) NAME | | | |
| PBM SIGNATURE | | DATE | |