



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 fiscal sustainability and responsible resource allocation.

NAME		EFFECTIVE DATE	
UNIT		POSITION NUMBER	300-XXX-5157-XXX
CLASSIFICATION	Analyst I		
SCOPE			
Under supervision of the Principal Program Budget Analyst, the Analyst I studies the principles and techniques of the area of work to which assigned and, under supervision, applies them; participates in analytical studies of organization, procedures, and policies; gathers, tabulates, and analyzes data; draws organization, work load, and other charts; interviews and consults with departmental officials, employees, and others to give and secure information; prepares reports and makes recommendations on procedures, policies, and program alternatives; reviews and analyzes proposed legislation and advises management on the potential impact; makes decisions on alternatives of average complexities; works as a field representative in intergovernmental negotiations; prepares correspondence.			
ESSENTIAL FUNCTIONS			
25%	<u>BUDGET PREPARATION</u>		
	• Prepare baseline Planning Estimates. • Develop baseline adjustments. Analyze departmental proposed baseline adjustments and make recommendations for adjustments. • Develop Finance Budget Change Proposals. Develop policy issues and make recommendations. • Review departmental Budget Change Proposals. Prepare written analyses that identify issues, alternatives, consequences, and make recommendations. • Prepare written analyses and make oral presentations and recommendations to all supervisory levels. Defend analysis and recommendations with Directors, Agency Secretaries and Constitutional Officers, as required. • Make changes to the Governor's Budget document to reflect approved baseline adjustments, and approved workload and policy decisions. • Prepare information regarding budgets in assigned area for statewide budget issues (i.e., salary increases, cost-of-living adjustments, etc.). • Ensure consistency in the Governor's Budget regarding traditional schedules, baseline budgets and budget changes, authority and personnel resources, operating expense schedules, and fund conditions.		

25%	<u>POLICY DEVELOPMENT AND ISSUE ANALYSIS</u> - Through daily contact with programs, the analyst can identify problems or potential problems early. The analyst makes recommendations regarding the administration or fiscal impact of programs and exercises initiative to correct or advise on matters where the analyst has authority and where appropriate. The analyst identifies problems for action by the Director of Finance and Governor's Office where appropriate. - The analyst 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, or the analyst 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. - The analyst is involved with complex formula driven financial issues and correlated spreadsheets for policy consideration.
20%	<u>LEGISLATION AND REGULATION</u> - 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 analyses, identifying or proposing amendments where necessary. - Analyze significant issues and identify problems in need of statutory change. Develop legislation and proposals for the Administration. - Analyze regulations and proposed changes to regulations for fiscal effects. Identify problems where regulation changes may be appropriate and make recommendations.
20%	<u>BUDGET DEFENSE AND REPRESENTATION</u> - Communicate budget changes and rationale for change to the Legislative Analyst's Office, legislative consultants, departments, and others. - Prepare rebuttals to the Legislative Analyst's recommendations. - Present the Governor's Budget and defend it before legislative committees. - Prepare the technical documents to reflect legislative changes to the budget. - Make recommendations for veto and write veto messages for the Governor.
5%	<u>ADMINISTRATION AND CONTROL</u> - Review proposed budget revisions. Determine consequences of approval or denial, determine whether notification to the Legislature is necessary (Section 28 letter), determine if authority to make change is appropriate, and make recommendation. - Review proposed personnel transaction to determine appropriateness of revision. Approve or deny.
5%	Other duties as required.
SPECIAL REQUIREMENTS	
- 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 public and business administration, management, supportive staff services, and governmental functions and organization.

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 and managerial problems.
- Develop and evaluate alternatives.
- Analyze data and present ideas and information effectively.
- Consult with and advise administrators or other interested parties on a wide variety of subject-matter areas.
- Gain and maintain the confidence and cooperation of those contacted during the course of work.

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.

EMPLOYEE SIGNATURE		DATE	
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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	



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 fiscal sustainability and responsible resource allocation.

NAME		EFFECTIVE DATE	
UNIT		POSITION NUMBER	300-XXX-5267-XXX
CLASSIFICATION	Finance Budget Analyst (FBA)		

SCOPE

Under the supervision of the Principal Program Budget Analyst, incumbents in this series review, gather data, research, analyze, formulate questions and make independent recommendations upon the budgetary and related fiscal affairs of one or more State agencies or departments; will be responsible for budget preparation, including revenue forecasts, budget defense, and presentation; administration and control of approved expenditure plans; make surveys and investigations of operating agencies and consult with and advise responsible agency officials on fiscal organization, fiscal procedure, and related problems; analyze budget requests and perform continuous budgetary control of appropriations; analyze legislation and prepare policy and issue analyses to summarize for either revenue or expenditure issues; analyze and justify budget programs; gather data and make studies on various problems arising in connection with financial administration; give information and instructions to officers and employees of State agencies concerning specific phases of budget and financial procedures; and prepare reports and correspondence. studies the principles and techniques of the area of work to which assigned and, under supervision, applies them; participates in analytical studies of organization, procedures, and policies; gathers, tabulates, and analyzes data; draws organization, work load, and other charts; interviews and consults with departmental officials, employees, and others to give and secure information; prepares reports and makes recommendations on procedures, policies, and program alternatives; reviews and analyzes proposed legislation and advises management on the potential impact; makes decisions on alternatives of average complexities; works as a field representative in intergovernmental negotiations; prepares correspondence.

ESSENTIAL FUNCTIONS

25%

BUDGET PREPARATION

- Prepare baseline Planning Estimates.
- Develop baseline adjustments. Analyze departmental proposed baseline adjustments and make recommendations for adjustments.
- Develop Finance Budget Change Proposals. Develop policy issues and make recommendations.
- Review departmental Budget Change Proposals. Prepare written analyses that identify issues, alternatives, consequences, and make recommendations.
- Prepare written analyses and make oral presentations and recommendations to all supervisory levels. Defend analysis and recommendations with Directors, Agency Secretaries and Constitutional Officers, as required.
- Make changes to the Governor's Budget document to reflect approved baseline adjustments, and approved workload and policy decisions.
- Prepare information regarding budgets in assigned area for statewide budget issues (i.e., salary increases, cost-of-living adjustments, etc.).
- Ensure consistency in the Governor's Budget regarding traditional schedules, baseline budgets and budget changes, authority and personnel resources, operating expense schedules, and fund conditions.

25%	<u>POLICY DEVELOPMENT AND ISSUE ANALYSIS</u> - Through daily contact with programs, the analyst can identify problems or potential problems early. The analyst makes recommendations regarding the administration or fiscal impact of programs and exercises initiative to correct or advise on matters where the analyst has authority and where appropriate. The analyst identifies problems for action by the Director of Finance and Governor's Office where appropriate. - The analyst 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, or the analyst 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. - The analyst is involved with complex formula driven financial issues and correlated spreadsheets for policy consideration.
20%	<u>LEGISLATION AND REGULATION</u> - 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 analyses, identifying or proposing amendments where necessary. - Analyze significant issues and identify problems in need of statutory change. Develop legislation and proposals for the Administration. - Analyze regulations and proposed changes to regulations for fiscal effects. Identify problems where regulation changes may be appropriate and make recommendations.
20%	<u>BUDGET DEFENSE AND REPRESENTATION</u> - Communicate budget changes and rationale for change to the Legislative Analyst's Office, legislative consultants, departments, and others. - Prepare rebuttals to the Legislative Analyst's recommendations. - Present the Governor's Budget and defend it before legislative committees. - Prepare the technical documents to reflect legislative changes to the budget. - Make recommendations for veto and write veto messages for the Governor.
5%	<u>ADMINISTRATION AND CONTROL</u> - Review proposed budget revisions. Determine consequences of approval or denial, determine whether notification to the Legislature is necessary (Section 28 letter), determine if authority to make change is appropriate, and make recommendation. - Review proposed personnel transaction to determine appropriateness of revision. Approve or deny.
5%	Other duties as required.
SPECIAL REQUIREMENTS	
- 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:

- Analytical procedures and methods for a variety of budgetary and fiscal related issues
- Research techniques to prepare, enact, maintain, and change the Governor's Budget
- Principles of organization and time management
- Basic mathematical and statistical principles and procedures to calculate and summarize numerical data.
- Effective writing techniques and departmental Writing Style Guidelines
- Laws relating to financial administration of state government.
- Awareness and understanding of the role of state government and Public Finance
- Awareness of the mission of the Department of Finance, and its key roles and responsibilities
- Forecasting techniques to develop, monitor, and modify revenue and/or cash flow projections to improve future estimates.
- Statistical methods, principles, and procedures in preparation of forecasts, cash flow projections, and track actual collection and disbursements.
- Principles and practices of governmental budgeting and accounting
- Economic and cost/benefit analysis to assist in the development and preparation related to the Governor's Budget
- Legislative and budgetary process, basic statutory controls on budgets, including the control sections, key statutes, and provisions of the Budget Act
- Purposes, functions, and fiscal organizations of state agencies to propose new and innovative ideas to utilize the state's resources more efficiently.
- Consistently exercise initiative, independence, and leadership capabilities to ensure the timely and accurate completion of work products.
- Team building techniques to assist in mentoring and training new staff on program assignment area.
- Programmatic and historical knowledge related to assignment area to consistently demonstrate a comprehensive knowledge of administrative position, protocol, and rational of main parties (Administration/Legislative Analyst office staff, legislative staff), and answer technical questions, and attempt to negotiate appropriate issues.
- Principles of effective negotiation to defend sensitive and complex issues related to the Governor's Budget through testimony in legislative hearings.
- Propose new and innovative ideas to utilize the state's resources more efficiently.

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

- Gather, analyze, comprehend, and interpret data, policies, procedures, laws, regulations, and Guidelines.
- Reason logically and creatively to effectively complete difficult assignments on short notice
- Take initiative to assume progressively greater responsibilities.
- Communicate effectively, both oral and written, with staff at all levels as well as departmental staff
- Exercise good judgment, communicate tactfully, act diplomatically, and maintain confidentiality.
- Effectively utilize word-processing and spreadsheet tools to prepare work products.
- Maintain flexibility with changing assignments and priorities.
- Effectively manage time and multiple priorities
- Gain and maintain cooperative relationships with all those contacted through the course of work.
- Work both in a team environment and individually
- Identify and alert management of potential problems/issues quickly.
- Be flexible and work overtime hours upon short notice.
- Develop and evaluate alternatives, make decisions and recommend effective courses of action.
- Identify risks and deficiencies in specific technical and programmatic areas, and determine cost-effective solutions.
- Coordinate with other staff within the department and staff from other departments
- Exercise initiative and independence to ensure timely completion of work products.
- Draw valid conclusions and make appropriate recommendations.
- Utilize relevant information sources from historical reference, Budget Analyst Guidelines (BAG), Budget and Finance Letters, Past Budget Summaries (A-Pages), Budget Act, etc.
- Identify information sources to utilize the state's resources more efficiently.
- Independently apply technical knowledge effectively
- Effectively review and edit written work products.
- Support and enforce established office policies and procedures, ethical behavior, and DOF core values.
- Prepare forecasts to project future estimates.
- Provide technical guidance for program assignment area to lower-level staff.
- Anticipate assignments from management.
- Conclude as to the adequacy, completeness, and accuracy of all work products

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.

EMPLOYEE SIGNATURE		DATE	
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SUPERVISOR NAME			
SUPERVISOR SIGNATURE		DATE	
PROGRAM BUDGET MANAGER (PBM) NAME			
PBM SIGNATURE		DATE	



DUTY STATEMENT

Department of Finance
Human Resources Office

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NAME		EFFECTIVE DATE	
UNIT		POSITION NUMBER	300-XXX-5266-XXX
CLASSIFICATION	Staff Finance Budget Analyst (SFBA)		

SCOPE

Under the general direction of the Principal Program Budget Analyst, incumbents in this series review, gather data, research, analyze, formulate questions and make independent recommendations upon the budgetary and related fiscal affairs of one or more State agencies or departments; will be responsible for budget preparation, including revenue forecasts, budget defense, and presentation; administration and control of approved expenditure plans; make surveys and investigations of operating agencies and consult with and advise responsible agency officials on fiscal organization, fiscal procedure, and related problems; analyze budget requests and perform continuous budgetary control of appropriations; analyze legislation and prepare policy and issue analyses to summarize for either revenue or expenditure issues; analyze and justify budget programs; gather data and make studies on various problems arising in connection with financial administration; give information and instructions to officers and employees of State agencies concerning specific phases of budget and financial procedures; and prepare reports and correspondence.

ESSENTIAL FUNCTIONS

25%	<u>BUDGET PREPARATION</u>
	• Prepare baseline Planning Estimates. • Develop baseline adjustments. Analyze departmental proposed baseline adjustments and make recommendations for adjustments. • Develop Finance Budget Change Proposals. Develop policy issues and make recommendations. • Review departmental Budget Change Proposals. Prepare written analyses that identify issues, alternatives, consequences, and make recommendations. • Prepare written analyses and make oral presentations and recommendations to all supervisory levels. Defend analysis and recommendations with Directors, Agency Secretaries and Constitutional Officers, as required. • Make changes to the Governor's Budget document to reflect approved baseline adjustments, and approved workload and policy decisions. • Prepare information regarding budgets in assigned area for statewide budget issues (i.e., salary increases, cost-of-living adjustments, etc.). • Ensure consistency in the Governor's Budget regarding traditional schedules, baseline budgets and budget changes, authority and personnel resources, operating expense schedules, and fund conditions.

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5%	Other duties as required.
SPECIAL REQUIREMENTS	
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KNOWLEDGE, SKILLS, AND ABILITIES

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- Basic mathematical and statistical principles and procedures to calculate and summarize numerical data.
- Effective writing techniques and departmental Writing Style Guidelines
- Laws relating to financial administration of state government.
- Awareness and understanding of the role of state government and Public Finance
- Awareness of the mission of the Department of Finance, and its key roles and responsibilities
- Forecasting techniques to develop, monitor, and modify revenue and/or cash flow projections to improve future estimates.
- Statistical methods, principles, and procedures in preparation of forecasts, cash flow projections, and track actual collection and disbursements.
- Principles and practices of governmental budgeting and accounting
- Economic and cost/benefit analysis to assist in the development and preparation related to the Governor's Budget
- Legislative and budgetary process, basic statutory controls on budgets, including the control sections, key statutes, and provisions of the Budget Act
- Purposes, functions, and fiscal organizations of state agencies to propose new and innovative ideas to utilize the state's resources more efficiently.
- Consistently exercise initiative, independence, and leadership capabilities to ensure the timely and accurate completion of work products.
- Team building techniques to assist in mentoring and training new staff on program assignment area.
- Programmatic and historical knowledge related to assignment area to consistently demonstrate a comprehensive knowledge of administrative position, protocol, and rational of main parties (Administration/Legislative Analyst office staff, legislative staff), and answer technical questions, and attempt to negotiate appropriate issues.
- Principles of effective negotiation to defend sensitive and complex issues related to the Governor's Budget through testimony in legislative hearings.
- Propose new and innovative ideas to utilize the state's resources more efficiently.
- Principles of leadership and training techniques to serve in a lead capacity.
- Assist in staff development.
- Political climate and views surrounding issues in areas of responsibility to provide policy, fiscal, and budgetary information to enable management to make informed decisions.
- Consistently exercise an advanced degree of initiative, independence, and leadership to ensure the timely and accurate completion of work products.

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

- Gather, analyze, comprehend, and interpret data, policies, procedures, laws, regulations, and Guidelines.
- Reason logically and creatively to effectively complete difficult assignments on short notice
- Take initiative to assume progressively greater responsibilities.
- Communicate effectively, both oral and written, with staff at all levels as well as departmental staff
- Exercise good judgment, communicate tactfully, act diplomatically, and maintain confidentiality.
- Effectively utilize word-processing and spreadsheet tools to prepare work products.
- Maintain flexibility with changing assignments and priorities.
- Effectively manage time and multiple priorities
- Gain and maintain cooperative relationships with all those contacted through the course of work.
- Work both in a team environment and individually
- Identify and alert management of potential problems/issues quickly.
- Be flexible and work overtime hours upon short notice.
- Develop and evaluate alternatives, make decisions and recommend effective courses of action.
- Identify risks and deficiencies in specific technical and programmatic areas and determine cost-effective solutions.
- Coordinate with other staff within the department and staff from other departments.
- Exercise initiative and independence to ensure timely completion of work products.
- Draw valid conclusions and make appropriate recommendations.
- Utilize relevant information sources from historical reference, Budget Analyst Guidelines (BAG), Budget and Finance Letters, Past Budget Summaries (A-Pages), Budget Act, etc.
- Identify information sources to utilize the state's resources more efficiently.
- Independently apply technical knowledge effectively
- Effectively review and edit written work products.
- Support and enforce established office policies and procedures, ethical behavior, and DOF core values.
- Prepare forecasts to project future estimates.
- Provide technical guidance for program assignment area to lower-level staff.
- Anticipate assignments from management.
- Conclude as to the adequacy, completeness, and accuracy of all work products.
- Exercise an advanced degree of independence and apply technical knowledge effectively and consistently.
- Verbally defend a position before legislative committees
- Analyze and research the most complex problems.
- Demonstrate leadership and inspire confidence of management.
- Serve as lead analyst in the assignment area during the Principal Program Budget Analyst's absence

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.			
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	