

STATE OF OHIO (DAS)CLASSIFICATION
SPECIFICATION**CLASSIFICATION SERIES:**

Budget/Management Analyst

SERIES NO.:

6322

MAJOR AGENCIES:

Office of Budget & Management only

EFFECTIVE DATE:

10/18/2015

SERIES PURPOSE:

The purpose of the budget/management analyst occupation is to monitor state fiscal activity.

At the lower levels, incumbents monitor and analyze fiscal activities of assigned agencies or assigned area of responsibility.

At the higher levels, incumbents oversee activities of team of budget/ management analysts, or serve as agency manager in the area of revenue estimation, debt service coordination or budget planning and special projects.

This class is restricted for use in Office of Budget & Management only.

JOB TITLE

Budget/Management Analyst 1

JOB CODE

63221

PAY GRADE

10

EFFECTIVE

04/26/2009

CLASS CONCEPT:

The entry level class works under immediate supervision & requires some knowledge in public or business administration, public policy or finance in order to monitor fiscal activities of assigned state agencies or assigned area of responsibility & to gain experience & knowledge of policies & procedures governing fiscal activities of state agencies.

JOB TITLE

Budget/Management Analyst 2

JOB CODE

63222

PAY GRADE

12

EFFECTIVE

10/18/2015

CLASS CONCEPT:

The developmental level class works under immediate supervision & requires working knowledge of public budgeting & finance in order to analyze fiscal activities of assigned state agencies or assigned area of responsibility.

JOB TITLE

Budget/Management Analyst 3

JOB CODE

63223

PAY GRADE

13

EFFECTIVE

04/26/2009

CLASS CONCEPT:

The full performance level class works under general supervision & requires considerable knowledge of public budgeting or finance in order to analyze both fiscal & program activities for group of agencies or assigned area of responsibility.

JOB TITLE

Budget/Management Analyst 4

JOB CODE

63224

PAY GRADE

14

EFFECTIVE

04/26/2009

CLASS CONCEPT:

The advanced level class works under direction & requires thorough knowledge of public budgeting or finance in order to coordinate & monitor activities of team of budget/management analysts or activities of other governmental units or other assigned area of responsibility.

JOB TITLE

Budget/Management Analyst 5

JOB CODE

63225

PAY GRADE

15

EFFECTIVE

04/26/2009

CLASS CONCEPT:

The expert level class works under direction & requires comprehensive knowledge of public budgeting or finance in order to coordinate activities of other budget/management analysts &/or related personnel in specific functions & projects & serve as coordinator for statewide projects or develop & implement over-all fiscal operations, policies & procedures for statewide fiscal programs.

JOB TITLE

Budget/Management Analyst Supervisor

JOB CODE

63226

PAY GRADE

16

EFFECTIVE

04/26/2009

CLASS CONCEPT:

The supervisory level class works under general direction & requires comprehensive knowledge of public budgeting or finance in order to supervise section of budget/management analysts in analysis of program & fiscal activities for state government, or serve as agency manager by formulating & responsibly directing implementation of statewide policy for one of following areas: revenue estimation, or debt service coordination, or budget planning and special projects.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Budget/Management Analyst 1	63221	EX	04/26/2009	10

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

In Office of Budget & Management only, monitors fiscal activities of assigned agencies (e.g., ensures spending patterns will not result in deficits; recommends appropriate action with respect to proposed expenses requiring approval of office of budget/management; assists & advises agencies concerning fiscal matters & state policies & procedures) &/or monitors fiscal activities of assigned area of responsibility (e.g., revenue projection, fund distribution; debt service; financial planning & supervision commissions; collective bargaining costs; electronic commerce & statewide indirect cost allocation planning).

Analyzes budget requests from assigned agencies & makes recommendations for funding levels to be used by executives in preparing budgets; reviews proposed spending plans of assigned agencies for forthcoming fiscal years &/or analyzes requests as they relate to assigned area of responsibility.

Analyzes proposed legislation affecting assigned agencies or areas of responsibility & makes recommendations concerning such legislation.

MAJOR WORKER CHARACTERISTICS:

Knowledge of budgeting; accounting; public finance; policies & procedures governing fiscal activities of state agencies*; legislative process*. Ability to use statistical analysis; analyze data, define problems & recommend alternatives; handle sensitive face-to-face & telephone contacts with government officials.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

Completion of undergraduate core program in public or business administration, public policy, finance or related area.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Class is exempt from collective bargaining as confidential employee.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Budget/Management Analyst 2	63222	EX	10/18/2015	12

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

In Office of Budget & Management only, analyzes fiscal activities of assigned agencies (e.g., ensures actual spending is consistent with proposed spending plans; makes forecasts concerning spending patterns to ensure agencies will not overspend appropriations & recommends appropriate action with respect to proposed expenses; assists & advises agencies concerning fiscal matters & state policies & procedures) &/or analyzes fiscal activities of assigned area of responsibility (e.g.; revenue projections, fund distribution; debt service; financial planning & supervision commissions; collective bargaining costs; electronic commerce & statewide indirect cost allocation planning).

Assists agencies in preparation of executive budgets; analyzes budget requests & recommends funding levels; reviews proposed spending plans &/or revenue projections for future periods.

Conducts reviews of programs for assigned agencies or assigned area of responsibility to determine impact & makes recommendations concerning possible improvements.

MAJOR WORKER CHARACTERISTICS:

Knowledge of budgeting; public finance; policies & procedures governing fiscal activities of state agencies*; organization theory*; public administration*. Ability to collect & analyze data, define problems & recommend solutions; use statistical analysis; handle sensitive face-to-face & telephone contacts with government officials.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

Completion of graduate major core program in public or business administration, public policy, finance, economics, resource management or related area.

-Or completion of undergraduate major core program in previously cited areas; 12 mos. work exp. in public budgeting or finance.

-Or 36 mos. trg. or 36 mos. exp. in public budgeting or finance.

-Or 12 mos. as Budget/Management Analyst 1, 63221.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Class is exempt from collective bargaining as confidential employee.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Budget/Management Analyst 3	63223	EX	04/26/2009	13

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

In Office of Budget & Management only, analyzes both fiscal & program activities for group of assigned agencies (e.g., ensures operations are consistent with goals & objectives & that agencies do not exceed their appropriations; recommends appropriation action with proposed expenditures &/or deviations from spending plans; assists & advises agencies concerning fiscal & program policies & procedures) &/or analyzes & recommends appropriate action for fiscal activity in assigned area of responsibility (e.g., revenue projections, fund distribution, economic forecasts; debt service; financial planning & supervision commissions; collective bargaining costs; electronic commerce & statewide indirect cost allocation planning).

Assists & advises agencies in preparation of executive budget requests; analyzes requests to make recommendations concerning funding levels & proposed spending plans.

Conducts in-depth program reviews of agencies to determine impact & make recommendations for program improvements.

MAJOR WORKER CHARACTERISTICS:

Knowledge of budgeting; public finance; policies & procedures governing fiscal activities of state agencies; organization theory; program evaluation*; public administration. Ability to collect & analyze data, define problems & recommend complex solutions; use statistical analysis; handle sensitive contacts with government officials.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

Completion of graduate major core program in public or business administration, public policy, finance, economics, resource management or related area; 12 mos. exp. in public administration.

-Or completion of undergraduate major core program in previously cited areas; 24 mos. exp. in budgeting or finance.

-Or 48 mos. trg. or 48 mos. exp. in public budgeting or finance.

-Or 12 mos. exp. as Budget/Management Analyst 2, 63222.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Class is exempt from collective bargaining as confidential employee.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Budget/Management Analyst 4	63224	EX	04/26/2009	14

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

In Office of Budget & Management only, coordinates & monitors activities of team of lower-level budget/management analysts or activities of other governmental units (e.g., reviews work of staff or units; assists & advises assigned staff or agencies or units in review & preparation of budget requests & spending plans) &/or coordinates, analyzes & monitors fiscal activities in assigned area of responsibility (e.g., revenue projections, fund distribution, economic forecasts; debt service; financial planning & supervision commissions; collective bargaining costs; electronic commerce & statewide indirect cost allocation planning).

Analyzes both fiscal & program activities for assigned group of agencies or units to ensure actual performance is consistent with goals & objectives; makes forecasts concerning operations to ensure agencies or units will not exceed their appropriations; analyzes & recommends appropriate action relative to proposed expenditures & deviations from spending plans; provides assistance & advice concerning fiscal program policies & procedures.

Conducts &/or directs in-depth reviews of programs for assigned agencies or units & makes recommendations to improve programs effectiveness & efficiency.

Assists & advises superiors concerning fiscal & management policies & in developing executive budget forms & guidelines; analyzes proposed legislation & related reports to make recommendations; drafts legislation.

MAJOR WORKER CHARACTERISTICS:

Knowledge of budgeting; public finance; management; employee training & development*; supervisory principles/techniques*; public administration; organization theory; program evaluation; policies & procedures governing fiscal activities of state agencies; legislative process. Ability to collect & analyze data, define problems & recommend solutions; use statistical analysis; establish friendly atmosphere as coordinator.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

Completion of graduate major core program in public or business administration, public policy, resource management, finance, economics or related area; 24 mos. exp. in public administration.

-Or 12 mos. exp. as Budget/Management Analyst 3, 63223.

-Or 24 mos. exp. as Budget/Management Analyst 2, 63222.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Class is exempt from collective bargaining as confidential employee.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Budget/Management Analyst 5	63225	EX	04/26/2009	15

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

In Office of Budget & Management only, coordinates activities of other budget/management analysts in specific functions & projects (e.g., budget planning; capital planning; allotment processing; bond & debt service coordination; revenue projections, fund distribution, economic forecasts; financial planning & supervision commissions; collective bargaining costs; electronic commerce & statewide indirect cost allocation planning), serves as coordinator for statewide projects on continuing basis & provides direction & guidance in budgetary, capital & programmatic policies & procedures (e.g., reviews & approves recommendations of other budget/ management analysts concerning proposed agency activities &/or expenditures or deviations from spending funds or projection; reviews proposed legislation &/or new legislation & advises supervisors on possible impact);

OR

Develops & implements over-all fiscal operations, policies & procedures for statewide programs, performs analytical review of related statewide activities, addresses statewide external issues related to fiscal programs; coordinates activities of internal & external personnel involved in programs.

Analyzes fiscal & programmatic activities of assigned area of responsibility; makes forecasts to ensure appropriations will not be exceeded; analyzes & recommends appropriate action for proposed expenditure of funds; assists & advises agencies &/or administrative staff concerning fiscal & program policies & budgetary implications of interagency programmatic policies procedures; assists administrative staff in development of executive budget & capital plan plus related forms & guidelines; analyzes, projects & advises administration & analysts on cost of spending plans & cost of debt related to proposals.

Provides policy statements & statistical information for state officials, legislature, state agencies, news media & general public; represents agency & offers testimony at hearings &/or related occasions; provides guidance & makes presentations at meetings of fiscal officers &/or other specialized audiences.

MAJOR WORKER CHARACTERISTICS:

Knowledge of budgeting; public finance; public administration; organizational theory; programs evaluation; management; legislative process; statistical methods*; agency, state &/or federal statutes, rules, regulations &/or procedures governing budgetary & management activities of state agencies. Ability to define problems, collect data, establish facts & draw valid conclusions; develop complex reports & position papers; handle sensitive inquiries from & contacts with government officials &/or general public.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

Completion of graduate major core program in public or business administration, resource management, finance, economics or related area; 30 mos. exp. in public administration.

-Or 6 mos. exp. as Budget/Management Analyst 4, 63224.

-Or 18 mos. exp. as Budget/Management Analyst 3, 63223.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Class is exempt from collective bargaining as confidential employee.

<u>JOB TITLE</u>	<u>JOB CODE</u>	<u>B. U.</u>	<u>EFFECTIVE</u>	<u>PAY GRADE</u>
Budget/Management Analyst Supervisor	63226	EX	04/26/2009	16

JOB DUTIES IN ORDER OF IMPORTANCE: (These duties are illustrative only. Incumbents may perform some or all of these duties or other job-related duties as assigned.)

In Office of Budget & Management only, supervises section of budget/management analysts, provides training, direction & guidance in programmatic policies & procedures (e.g., revenue estimating, budgeting, economic forecasting; debt service; financial planning & supervision commissions; collective bargaining costs; electronic commerce & statewide indirect cost allocation planning) & reviews & approves recommendations from staff concerning budget/management activities (e.g., estimates of revenues, deviations from spending plans, proposed legislation, proposed expenditures of funds, in-depth program reviews, policy development);

OR

Formulates & responsibly directs implementation of statewide policy for revenue estimation, or debt service coordination, or budget planning & special projects.

Analyzes fiscal & programmatic activities for state government in general &/or for specific state agencies; makes forecasts to ensure appropriations are not exceeded; recommends appropriate action for proposed expenditures; assists & advises agencies concerning fiscal & budgetary policy; conducts in-depth program reviews.

Advises administrative staff concerning new legislation &/or impact of pending legislation & concerning fiscal & programmatic policies & procedures for state government in general &/or for specific state agencies; assists in development of executive & capital budget forms, tables, guidelines &/or reports; recommends policies & procedures having statewide impact.

Represents department & offers testimony at hearings & other occasions; provides guidance & prepares & delivers presentations at meeting of directors, fiscal officers & other interested parties.

MAJOR WORKER CHARACTERISTICS:

Knowledge of budgeting; public finance; public administration; organizational theory; program evaluation; management; supervisory principles/techniques*; legislative process; economics; agency, state &/or federal statutes, rules, regulations &/or procedures governing budget/management activities of state agencies. Ability to define problems, collect data, establish facts & draw valid conclusions; use statistical analysis; establish friendly atmosphere as supervisor.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

Completion of graduate major core program in public or business administration, public policy, resource management, finance, economics or related area; 36 mos. exp. in public administration.

-Or 6 mos. exp. as Budget/Management Analyst 5, 63225.

-Or 12 mos. exp. as Budget/Management Analyst 4, 63224.

-Or 24 mos. exp. as Budget/Management Analyst 3, 63223.

-Or equivalent of Minimum Class Qualifications for Employment noted above.

TRAINING AND DEVELOPMENT REQUIRED TO REMAIN IN THE CLASSIFICATION AFTER EMPLOYMENT:

Not applicable.

UNUSUAL WORKING CONDITIONS:

Class is exempt from collective bargaining as confidential employee &/or as supervisor.