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

CLASSIFICATION SERIES:	SERIES NO.:
Budget Analyst	6325
MAJOR AGENCIES:	EFFECTIVE DATE:
All Agencies	03/07/2004

SERIES PURPOSE:
The purpose of the budget analyst occupation is to research, analyze, project and monitor fiscal/budgeting activity (i.e., projection, preparation, analysis and implementation of a biennial budget and/or federal grant budget submission and process through the legislative session) for assigned agency or sub-division thereof or for certain financial programs. grants, or item accounts in an agency with complex budgetary functions (i.e., multiple funding sources, multiple line items and/or pass-through subsidy programs to fund operations of other political jurisdictions and/or community/private agencies and/or state agencies).

At the lowest levels, incumbents establish and maintain payroll coding to ensure proper allocation of payroll costs to programs and/or proper reimbursement of federal funds and prepare/create account coding to correctly identify each revenue and expenditure for assigned agency, or research, analyze, project/formulate and adjust and monitor allocations.

At the higher levels, incumbents act as supervisor over budget analysts assigned to one unit engaged in research, analysis, projecting/formulating, adjusting only a portion of a state agency's overall budgetary and fiscal management and control system or assist higher-level fiscal manager in planning, directing and coordinating entire budgetary and fiscal management & control system for assigned state agency:

In the Ohio Department of Transportation, incumbents formulate and implement fiscal program policies and procedures in order to administer departmental budget (i.e., participate in development of Ohio Department of Transportation highway capital construction program);

OR

In Ohio Department of Transportation, assist deputy director of finance and forecasting with planning, directing and coordinating departments multi-billion dollar, multi-program, biennium budget and formulate and implement budgetary policies.

Note: The classification series is typically restricted for use in a central budget office. However, if agency is large with offices decentralized at regional, district and/or institutional locations, positions may be assigned to a division's central budget office.

CLASS TITLE:

CLASS NUMBER:

Budget Analyst 1

EFFECTIVE DATE:

07/20/1997

CLASS CONCEPT:

The full performance level class works under direction & requires considerable knowledge of governmental budgeting. public finance, public or business administration & quantitative/statistical analysis & skill in use of applicable software applications in order to establish & maintain payroll coding to ensure proper allocation of costs for federal & state requirements &/or proper reimbursement of federal funds & prepare/create account coding to correctly identify each revenue & expenditure for assigned agency.

CLASS TITLE:

CLASS NUMBER:

Budget Analyst 2

63252

EFFECTIVE DATE:

03/07/2004

CLASS CONCEPT:

The advanced level class works under direction & requires thorough knowledge of governmental budgeting, public finance, public or business administration, quantitative/statistical analysis & forecasting & skill in use of applicable software applications in order to research, analyze, project/formulate & adjust & monitor allocations (e.g., revenue projection, fund distribution, cost allocations, budget balances) for assigned agency or sub-division thereof or for certain financial programs, grants or item accounts, monitor spending patterns to prevent deficits & recommend approval/disapproval of proposed expenditures &/or budget adjustments.

CLASS TITLE:

CLASS NUMBER:

Budget Analyst Supervisor 1

63255

EFFECTIVE DATE:

03/07/2004

CLASS CONCEPT:

The first supervisory level class works under direction & requires thorough knowledge of governmental budgetary, public finance, public or business administration, quantitative/statistical analysis & forecasting, skill in use of applicable software applications in order to supervise budget analysts assigned to one unit engaged in research, analysis, projecting, formulating, adjusting & monitoring specified allocations representing only portion of state agency's overall budgetary & fiscal management & control system;

OR

In Ohio Department of Transportation, formulate & implement fiscal program policies & procedures in order to administer departmental budget (i.e., participate in development of Ohio department of transportation highway capital construction program).

CLASS TITLE:

CLASS NUMBER:

Budget Analyst Supervisor 2

63256

EFFECTIVE DATE:

03/07/2004

CLASS CONCEPT:

The second supervisory level class works under administrative direction & requires extensive knowledge of governmental budgetary, public finance, public or business administration, quantitative/statistical analysis & forecasting & skill in use of applicable software applications in order to supervise budget analysts assigned to one unit (i.e., minimum of two budget analysts) or multiple work units (i.e., minimum of two budget analysts per work unit & at least one unit is headed by lower-level budget analyst supervisor) & in addition to one of preceding options, assist higher-level chief financial officer/controller in planning, directing & coordinating entire budgetary & fiscal management & control system for assigned state agency;

OR

In Ohio Department of Transportation, assist deputy director of finance & forecasting with planning, directing & coordinating departments multi-billion dollar, multi-program, biennium budget & formulate & implement budgetary policies (e.g., review & analyze data, prepare complex reports & position papers for executive leadership relative to development, submission & monitoring of agency biennial budget to include forecast of federal & state funding for highways, transit, aviation & rail; prepare appropriation adjustments requested from controlling board; review state & federal legislative proposals, bills & acts affecting biennium budget; operate microcomputer & accesses agency computer information systems to gather data & perform statistical/quantitative analysis).

CLASS TITLE:	CLASS NUMBER:	BARGAINING UNIT:
Budget Analyst 1	63251	014

07/20/1997

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

Establishes/maintains payroll coding (e.g., enters data into data base file; updates & makes corrections weekly) to ensure proper allocation of costs to federal programs &/or proper reimbursement of federal funds, prepares paperwork to create accounting codes which identify revenues & expenditures following central accounting system criteria, examines codes to determine if they will meet state & federal guidelines & distributes listing for use by program & financial staff, assigns reference numbers to identify way program or area is coded for payroll & enters funding information (e.g., fund, ADRC, SAC, SPRC, grant) into on-line financial system.

Processes requests to move appropriation funds through spending authorization adjustments or plan adjustments, assigns document number & records transaction to worksheet & enters data into on-line accounting system (i.e., CAS); extracts payroll information from on-line financial system & places in worksheet file; produces payroll analysis report from worksheet file to show availability of payroll funds & project any shortages in appropriations; extracts monthly expenditure from CAS report to produce monthly expenditure report to compare actual expenditures against estimated expenditures; conducts research & analysis requiring use of analysis to plan, project & forecast payroll expenditures; makes budget adjustments or revisions as requested.

Reviews personnel action forms to determine how newly hired, promoted or reassigned employees are to be coded on payroll, completes form by entering reference number, obtains authorized signature & forwards to human resources office; produces other reports as requested (e.g., quarterly report to show payroll expenditures for food stamp reinvestment program or other specific programs); participates on team to research & analyze data, prepare &/or review projection/forecast models for special projects &/or program areas with multiple funding sources.

MAJOR WORKER CHARACTERISTICS:

Knowledge of governmental budgeting; public accounting, finance, or public or business administration; quantitative/statistical analysis; central accounting system &/or federal accounting & reporting system*. Skill in operation of microcomputer & applicable software applications (e.g., spreadsheets, data bases). Ability to apply statistical/quantitative analysis to determine available funding & project shortages in appropriations & compare actual expenditures against estimated expenditures; use proper research methods in gathering data; gather, collate & classify information about data, people or things; research, collect & analyze data, establish facts & draw valid conclusions; develop financial reports; prepare comprehensive reports containing analysis; cooperate with co-workers on group projects &/or respond to general & sensitive inquiries from & contacts with other governmental employees/officials.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

Completion of undergraduate core coursework in accounting, public finance or public or business administration; 12 mos. exp. in fiscal analysis, management & control (e.g., probability; linear regression; multiple variable regression; computer assisted regression analysis models; trend analysis; forecasting cost benefits analysis); 3 mos. trg. or 3 mos. exp. in operation of microcomputer & use of applicable software applications (e.g., spreadsheets; databases).

-Or completion of graduate core coursework in public finance or public or business administration which included coursework in statistical/quantitative analysis (e.g., probability; linear regression; multiple variable regression; computer assisted regression analysis models; trend analysis; forecasting cost benefit analysis); 3 mos. trg. or 3 mos. exp. in operation of microcomputer & use of applicable software applications (e.g., spreadsheets; databases).

Note: In Ohio Bureau of Workers' Compensation, classification may require use of proficiency demonstration to determine minimum class qualifications for employment.

-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: Not applicable.

CLASS TITLE:	CLASS NUMBER:	BARGAINING UNIT:
Budget Analyst 2	63252	014

03/07/2004

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

Researches & analyzes/evaluates data, projects/formulates, adjusts & monitors allocations (e.g., reserve projection, fund distribution, cost allocations, budget balances) for assigned agency or sub-division thereof or for certain financial programs, grants &/or item accounts (i.e., only in agency having multiple funding sources, pass-through subsidy &/or multiple line items) requiring use of statistical/quantitative analysis (e.g., linear regression, multiple variable regression, probability statistics, computer assisted regression analysis models, trend analysis, forecasting cost benefit analysis &/or cash flow analysis) & monitors spending patterns in order to prevent spending deficits & recommends approval/disapproval of proposed expenditures &/or budget revisions &/or recommends alternative solutions for areas of concern.

Operates microcomputer & uses applicable software applications (e.g., spreadsheets, databases, word processing) to formulate or formulates expenditure/cost projections &/or other statistical/quantitative analyses, generate various reports & update file information; depending upon assignment, does one or more of following tasks: projects subsidy costs, monitors expenditures levels of other public/private organizations or other governmental agencies, develops, tracks & prepares financial analysis of proposed legislation or policy change, completes federal reports of estimated &/or actual expenditures, develops multi-variate models to project caseloads, advises other state or county agency or recipient organization program staff concerning fiscal matters (e.g., explains state, federal &/or departmental policies & procedures), assists with developing agency's biennium budget & evaluating/monitoring of budget implementation to include periodic reporting to senior management &/or monitors allocation unit data used to generate billings for services & projects revenues using appropriate statistical techniques.

Attends legislative budget office, senate & house & conference committee hearings; reviews proposed state & federal legislation & policy changes to determine fiscal impact; prepares controlling board requests; coordinates/prepares responses to inquiries from legislature, office of budget & management &/or other state &/or federal agencies &/or recipient organizations; designs & develops procedures/guidelines to ensure compliance; completes special reports (e.g., charts of accounts; obligation authority); evaluates &/or participates in evaluation of budget operations (e.g., technical improvements; automation); assists in responding to audit findings to achieve compliance; participates on team (e.g., member, leader) to research & analyze data, prepare &/or review projection/forecast models for special projects &/or program areas with multiple funding sources; prepares periodic financial reports, position/option papers related to analysis.

MAJOR WORKER CHARACTERISTICS:

Knowledge of governmental budgeting; public finance or public or business administration; quantitative/statistical analysis; central accounting system &/or federal accounting system*; federal &/or state statutes governing budgeting & fiscal management*. Skill in operation of microcomputer & applicable software applications (e.g., spreadsheets, databases, word processing). Ability to apply statistical/quantitative methods (e.g., probability statistics; linear regression, multiple variable regression, computer assisted regression analysis models, trend analysis, forecasting cost benefit analysis &/or cash flow analysis); use proper research methods in gathering data; gather, collate & classify information about data, people or things; research & interpret historical data in terms of fiscal, programmatic, social political &/or economic trends; deal with many variables & recommend resolutions; prepare comprehensive reports containing analysis; develop substantive program knowledge & understanding of program operations in order to evaluate financial impact of state/federal policy changes on programs; handle general & sensitive inquiries from & contacts with other governmental employees/officials, representatives of recipient organizations &/or general public.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

12 mos. exp. as Budget Analyst 1, 63251.

- -Or completion of graduate core coursework in public finance, public administration or business administration; 12 mos. exp. in fiscal management & control involving use of statistical/quantitative analysis (e.g., probability statistics, linear regression, multiple variable regression, computer regression analysis models, trend analysis, forecasting cost benefits analysis) to formulate/project, adjust & monitor allocations; 9 mos. trg. or 9 mos. exp. in operation of microcomputer & applicable software applications (e.g., spreadsheets, databases, word processing).
- -Or completion of undergraduate core coursework in accounting, public finance, public administration or business administration; 24 mos. exp. in fiscal management & control involving use of statistical/quantitative analysis (e.g., probability statistics, linear regression, multiple variable regression, computer assisted regression analysis models, trend analysis, forecasting cost benefits analysis) to formulate/project, adjust & monitor allocations; 9 mos. trg. or 9 mos. exp. in operation of microcomputer & applicable software applications (e.g., spreadsheets, databases, word processing).

Note: In Ohio Bureau of Workers' Compensation, classification may require use of proficiency demonstration to determine minimum class qualifications for employment.

-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:

May be required to work long or unusual hours during budget preparation.

CLASS TITLE:	CLASS NUMBER:	BARGAINING UNIT:
Budget Analyst Supervisor 1	63255	EX

03/07/2004

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

Supervises budget analysts assigned to one work unit, plans, directs, & coordinates unit activities with program staff, other governmental agencies &/or recipient organizations of pass-through subsidies & provides guidance & training to staff to ensure timely & accurate budgetary allocations, adjustments & related budgetary information;

OR

In Ohio Department of Transportation, formulate & implement fiscal program policies & procedures in order to administer departmental budget (i.e., participate in development of Ohio department of transportation highway capital construction program).

Certifies expenditures in accordance with established budgets; reviews proposed legislation &/or policy changes to determine financial impact &/or establishes accounting procedures on new policies/procedures in line with legislative/policy requirements; assists in preparing, planning, implementing & monitoring/review of assigned allocations & in preparing/prepares variety of state &/or federal financial reports/analysis (e.g., prepares &/or reviews projections/forecast models for program areas; prepares variances between actual & expected expenditures through use of comparative data over time; prepares regression models; directs/oversees preparation of &/or prepares models for long range projections of surpluses/deficits & determines appropriate action to be considered; prepares pass-through subsidy allocations; prepares monthly & quarterly reports &/or controlling board requests; reviews written narratives & explanations of costs methodologies for quarterly & annual cost allocation plan; prepares projections & analysis for annual & biennial budgets; assists with developing agency's biennium budget & evaluating/monitoring of budget implementation to include periodic reporting to senior management); conducts studies/review of unit activities to improve efficiency & ensure compliance; operates microcomputer to prepare/generate reports & statistical/quantitative analysis; in Ohio department of transportation, prepares, monitors & analyzes funding scenarios for departmental highway construction budget, assists deputy director of finance in formulation & implementation of highway capital construction program budget.

Develops, coordinates &/or provides training to departmental staff &/or recipients for subsidy programs concerning budgeting & fiscal control; attends internal/external training sessions & conferences & reads to remain current on regulations, policies & other issues (e.g., latest budget trends; philosophies) affecting assigned operations; serves as liaison with office of budget & management, legislative budget office, administrative officials other federal & state agencies &/or organizations regarding fiscal/budgetary matters; acts in absence of immediate supervisor when assigned; responds to inquiries relative to audit findings & other fiscal/budgetary matters.

MAJOR WORKER CHARACTERISTICS:

Knowledge of supervisory principles & techniques*; governmental budgeting; public finance or public or business administration; quantitative/statistical analysis; central accounting system &/or federal accounting system*; federal &/or state statutes governing budgetary & fiscal management*. Skill in operation of microcomputer & applicable software applications (e.g., spreadsheets, databases, word processing). Ability to apply statistical/quantitative methods (e.g., probability statistics, linear regression, multiple variable regression, computer assisted regression analysis models, trend analysis, forecasting cost benefit analysis &/or cash flow analysis); use proper research methods in gathering data; gather, collate & classify information about data, people or things; research & interpret historical data in terms of fiscal, programmatic, social, political &/or economic trends; deal with many variables & recommend resolutions; prepare comprehensive reports containing analysis; develop substantive program knowledge & understanding of program operations in order to evaluate financial impact of state/federal policy changes on programs; handle general & sensitive inquiries from & contacts with other governmental employees/officials representatives of recipient organizations &/or general public; establish friendly atmosphere as unit supervisor.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

12 mos. exp. as Budget Analyst 2, 63252.

-Or completion of graduate core coursework in public finance, public administration or business administration; 24 mos. exp. in fiscal management & control involving use of statistical/quantitative analysis (e.g., probability statistics, linear

regression, multiple variable regression, computer assisted regression analysis models, trend analysis, forecasting cost benefits analysis) to formulate, project, adjust & monitor allocations; 12 mos. trg. or 12 mos. exp. in use of microcomputer & applicable software applications (e.g., spreadsheets, databases, word processing).

-Or completion of undergraduate core coursework in public finance, public administration or business administration; 36 mos. exp. in fiscal management & control involving use of statistical/quantitative analysis (e.g., probability statistics, linear regression, multiple variable regression, computer assisted regression analysis models, trend analysis, forecasting cost benefits analysis) to formulate, project, adjust & monitor allocations; 12 mos. trg. or 12 mos. exp. in use of microcomputer & applicable software applications (e.g., spreadsheets, databases, word processing).

-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:

Not applicable.

CLASS TITLE:	CLASS NUMBER :	BARGAINING UNIT:
Budget Analyst Supervisor 2	63256	EX

03/07/2004

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

Supervises budget analysts &/or lower-level budget analyst supervisors assigned to one or more work units & assists higher-level chief financial officer/controller in planning directing & coordinating entire budgetary & fiscal management & control system for assigned state agency (e.g., evaluates, develops & recommends agency budgetary & fiscal management & control policies, procedures, goals & objectives; participates or chairs committees to perform budgetary/fiscal functions);

OR

In Ohio Department of Transportation, assists deputy director of finance & forecasting with planning, directing & coordinating departments multi-billion dollar, multi-program, biennium budget & formulates & implements budgetary policies (e.g., reviews & analyzes data; prepares complex reports & position papers for executive leadership relative to development, submission & monitoring of agency biennial budget to include forecast of federal & state funding for highways, transit, aviation & rail; prepares appropriation adjustments requested from controlling board; reviews state & federal legislative proposals, bills & acts affecting biennium budget; operates microcomputer & accesses agency computer information systems to gather data & performs statistical/quantitative analysis).

Reviews/analyzes &/or prepares numerous complex reports & position papers related to development, submission & monitoring of agency's biennial budget to include federal monies, controlling board requests, cost allocation plans & contract review; reviews legislative proposals related to biennial budget process & estimates/cost analysis thereof; operates microcomputer to prepare/generate reports & statistical/quantitative analysis; in Ohio Department of Transportation, reviews & analyzes data & prepares complex reports & position papers for departmental executive leadership relative to development, submission & monitoring of departmental biennial budget.

Certifies expenditures in accordance with established budgets; reviews proposed legislation &/or policy changes to determine financial impact &/or establishes accounting procedures on new policies/procedures in line with legislative/policy requirements; assists in preparing, planning, implementing & monitoring/review of assigned allocations; prepares variety of state &/or federal financial reports/analysis (e.g., prepares &/or reviews projections/forecast models for program areas; prepares variances between actual & expected expenditures through use of comparative data over time; prepares regression models; directs/oversees preparation of &/or prepares models for long range projections of surpluses/deficits & determines appropriate action to be considered; prepares pass-through subsidy allocations; prepares monthly & quarterly reports &/or controlling board requests; reviews written narratives & explanations of costs methodologies for quarterly & annual cost allocation plan; prepares projections & analysis for annual & biennial budgets; assists with developing agency's biennium budget & evaluating/monitoring of budget implementation to include periodic reporting to senior management); conducts studies/review of unit activities to improve efficiency & ensure compliance.

Works extensively with agency's executive, fiscal & program staff, office of budget & management, Ohio general assembly & legislative budget office to coordinate, analyze & monitor agency's budget; attends professional meetings & training & reads publications & special reports for professional growth; completes special projects as assigned (e.g., plans conferences & team activities).

MAJOR WORKER CHARACTERISTICS:

Knowledge of supervisory principles & techniques; governmental budgeting; public finance or public or business administrative quantitative/statistical analysis; central accounting systems &/or federal accounting system*; federal &/or state statutes governing budgetary & fiscal management*. Skill in operation of microcomputer & applicable software applications (e.g., spreadsheets; databases; word processing). Ability to apply statistical/quantitative methods (e.g., probability statistics, linear regression, multiple variable regression, computer assisted regression analysis models, trend analysis, forecasting cost benefit analysis &/or cash flow analysis); use proper research methods in gathering data; gather, collate & classify information about data, people or things; research & interpret historical data in terms of fiscal, programmatic, social, political &/or economic trends; deal with many variables & recommend resolutions; prepare comprehensive reports containing analysis; develop substantive program knowledge & understanding of program operations in order to evaluate financial impact of state/federal policy changes on programs; handle general & sensitive inquiries from & contacts with other governmental employees/officials, representatives of recipient organizations &/or general public; establish friendly atmosphere as assistant chief financial officer/controller.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT:

12 mos. exp. as Budget Analyst Supervisor 1, 63255.

- -Or 24 mos. exp. as Budget Analyst 2, 63252; 12 mos. exp. as supervisor or manager.
- -Or completion of graduate core coursework in public finance, public administration or business administration; 24 mos. exp. in fiscal management & control involving use of statistical/quantitative analysis (e.g., probability statistics, linear regression, multiple variable regression, computer assisted regression analysis models, trend analysis, forecasting cost benefit analysis) to formulate/project, adjust & monitor allocations; 18 mos. trg. or 18 mos. exp. in operation of microcomputer & applicable software applications (e.g., spreadsheets; databases; word processing); 12 mos. exp. as supervisor or manager.
- -Or completion of undergraduate core coursework in public finance, public administration or business administration; 36 mos. exp. in fiscal management & control involving use of statistical/quantitative analysis (e.g., probability statistics; linear regression; multiple variable regression; computer assisted regression analysis models; trend analysis; forecasting cost benefit analysis) to formulate/project, adjust & monitor allocations; 18 mos. trg. or 18 mos. exp. in operation of microcomputer & applicable software applications (e.g., spreadsheets; data bases; word processing); 12 mos. exp. as supervisor or manager.
- -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:

Not applicable.