### SERIES PURPOSE

The purpose of the budget analyst occupation is to research, analyze, project & monitor fiscal/budgeting activity for assigned agency or sub-division.

### GLOSSARY – the terms below are to be interpreted as follows wherever they appear in the classification specification:

- **A/P** – Accounts Payable
- **A/R** – Accounts Receivable
- **BI** – Business Intelligence reporting module of Ohio Administrative Knowledge System
- **Controlling Board** – comprised of the Director of the Office of Budget & Management, or his or her designee, & six members of the Ohio General Assembly. The board provides legislative oversight over certain capital & operating expenditures by state agencies & has approval authority over various other state fiscal & purchasing activities. The board is a mechanism for handling certain limited day-to-day adjustments needed in the state budget.
- **ERP** – Enterprise Resource Planning system
- **FIN** – Financials module of Ohio Administrative Knowledge System
- **OAKS** – Ohio Administrative Knowledge System
- **OBM** – Ohio Office of Budget & Management
- **Pro forma** – reflecting a transaction (as a merger) or other development as if it had been or will be in effect for a past or future period
- **RMS** – Random Moment Sampling
- **SWCAP** – Statewide Cost Allocation Plan

Job duty, knowledge, skill, & ability statements at a lower-level are understood to be able to be performed at any higher level.

### JOB TITLE

#### Budget Analyst

<table>
<thead>
<tr>
<th>JOB TITLE</th>
<th>JOB CODE</th>
<th>PAY GRADE</th>
<th>EFFECTIVE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Budget Analyst</td>
<td>63261</td>
<td>32</td>
<td>07/26/2015</td>
</tr>
</tbody>
</table>

### CLASS CONCEPT

The full performance level class works under general supervision & requires considerable knowledge of governmental budgeting, public finance, public or business administration & quantitative/statistical analysis & skill in use of applicable software application in order to build, monitor, maintain &/or prepare the capital/operating budget, agency office/section/division budgets & allotments.

### JOB TITLE

#### Senior Budget Analyst

<table>
<thead>
<tr>
<th>JOB TITLE</th>
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<tbody>
<tr>
<td>Senior Budget Analyst</td>
<td>63262</td>
<td>33</td>
<td>07/26/2015</td>
</tr>
</tbody>
</table>

### 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 plan & implement the capital/operating budget, agency office/section/division budgets & allotments.
CLASS CONCEPT
The supervisory level class works under general 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 supervise budget analysts involved in preparation of the capital/operating budget.
JOB TITLE: Budget Analyst  
JOB CODE: 63261  
B. U.: 14  
EFFECTIVE: 07/26/2015  
PAY GRADE: 32

**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.)

1. Builds, monitors, maintains &/or prepares the capital/operating budget:
   - Participates in the internal budget planning process
   - Works with program staff to develop, plan & prepare capital/operating budgets
   - Monitors & maintains capital/operating appropriations & reappropriations
   - Monitors & maintains agency office/section/division budgets
   - Monitors & maintains allotments
   - Ensures that funds & appropriations are used in accordance with Ohio law
   - Identifies necessary budget changes & adjustments to meet current operating situation (e.g., payroll, maintenance, equipment, mid-course changes of priorities)
   - Monitors & analyzes the cash flow of agency funds to ensure adequate balances to pay current & future obligations
   - Maintains & reviews chart of accounts & coding related to cost allocation plans

2. Prepares, uploads & runs payroll information to accounting applications:
   - Reviews personnel actions for budget considerations (e.g., personnel ceiling levels, available funding) & recommends for approval/disapproval
   - Maintains payroll worksheets to ensure accurate tracking & reporting of financial information
   - Updates & maintains payroll combo codes to ensure legal compliance & reporting integrity & applies combo codes to positions

3. Prepares financial & management reports:
   - Creates & writes reports that provide accurate & valid financial information
   - Enters fiscal data accurately & efficiently into accounting, reporting & analytical applications
   - Ensures grant revenues & expenditures are uniquely tracked pursuant to financial & grant award reporting requirements
   - Prepares internal & external budgets reports as required
   - Establishes codes for A/R, requisitions & A/P transactions to ensure accurate tracking & reporting of financial information
   - Reconciles & verifies fiscal transactions (e.g., vouchers, contracts, encumbrances) to ensure legal compliance & reporting integrity
   - Researches inquiries from internal & external auditors during & after audit (e.g., replies to reports & recommendations)
   - Performs quality reviews of financial transactions, including payroll, to ensure reporting integrity (i.e., chart of accounts)
   - Monitors grant awards & recipients to ensure compliance with grant requirements

**MAJOR WORKER CHARACTERISTICS**
Knowledge of accounting; quantitative/statistical analysis; budgeting; public or business administration or public finance; agency policies & procedures*; federal &/or state statutes governing budgeting & fiscal management*; ERP systems* (e.g., OAKS FIN) &/or federal accounting system*. Skill in operation of electronic devices (e.g., computer, tablet, cell phone) & applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting*. Ability to apply quantitative/statistical analysis & methods (e.g., trend analysis &/or cash flow analysis) to determine available funding & project overages & 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; collaborate with co-workers on group projects &/or respond to general & sensitive inquiries from governmental employees/officials.

(*)Developed after employment.

**MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT**
Completion of graduate core program in accounting, public finance, public administration or business administration which included coursework in quantitative/statistical analysis (e.g., probability; linear regression; multiple variable regression;
computer assisted regression analysis models; trend analysis; forecasting cost benefit analysis).

-Or completion of undergraduate core program in accounting, public finance, public administration or business administration; 12 mos. exp. in budgeting that included fiscal analysis, management & control (e.g., probability; linear regression; multiple variable regression; computer assisted regression analysis models; trend analysis; forecasting cost benefit analysis).

-Or 3 yrs. experience in budgeting that included fiscal analysis, management & control (e.g., probability; linear regression; multiple variable regression; computer assisted regression analysis models; trend analysis; forecasting cost benefit analysis).

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

TRAINING & 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.
MAJOR WORKER CHARACTERISTICS
Knowledge of accounting; quantitative/statistical analysis; budgeting; public or business administration or public finance; agency policies & procedures*; federal &/or state statutes governing budgeting & fiscal management*; ERP systems* (e.g., OAKS FIN) &/or federal accounting system*. Skill in operation of electronic devices (e.g., computer, tablet, cell phone) & applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting*. Ability to apply quantitative/statistical analysis & methods (e.g., forecasting, cost/benefit analysis) to determine available funding & project overages & 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 & interpret historical data in terms of fiscal, programmatic, social, political &/or economic trends; deal with many variables & recommend resolutions; prepare comprehensive reports containing analysis; evaluate financial impact of state/federal
policy changes on programs; handle general & sensitive inquiries from governmental employees/officials, representatives of recipient organizations &/or general public.

(*)Developed after employment.

MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT
Completion of graduate core program in accounting, public finance, public administration or business administration; 12 mos. exp. in fiscal management & control involving use of quantitative/statistical analysis (e.g., probability statistics, linear regression, multiple variable regression, computer regression analysis models, trend analysis, forecasting cost benefit analysis).

- Or completion of undergraduate core program in accounting, public finance, public administration or business administration; 24 mos. exp. in fiscal management & control involving use of quantitative/statistical analysis (e.g., probability statistics, linear regression, multiple variable regression, computer assisted regression analysis models, trend analysis, forecasting cost benefit analysis).

- Or 12 mos. exp. as Budget Analyst, 63261.

- Or 4 yrs. experience in budgeting that included fiscal management & control involving use of quantitative/statistical analysis (e.g., probability statistics, linear regression, multiple variable regression, computer assisted regression analysis models, trend analysis, forecasting cost benefit analysis).

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

TRAINING & 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.
**JOB TITLE**  
Budget Analyst Supervisor

**JOB CODE**  
63265

**B. U.**  
EX

**EFFECTIVE**  
02/05/2017

**PAY GRADE**  
14

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**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.)

1. **Supervises budget analysts:**
   - Directs & coordinates the building, planning & preparation of the capital/operating budget, agency office/section/division budgets & allotments
   - Oversees the monitoring, maintaining, & implementation of the capital/operating budget, agency office/section/division budgets & allotments
   - Provides guidance & training to budget staff; coaches & develops staff
   - Establishes, implements & monitors goals, objectives & performance metrics
   - Reviews, modifies & recommends coding, cost allocation, rates, chart of accounts & coordinates with program areas & offices
   - Approves statistical reports & financial statements for distribution
   - Establishes work unit procedures

2. **Develops & implements reports & compliance measures:**
   - Prepares periodic reporting to senior management
   - Certifies expenditures in accordance with established budgets
   - Prepares, plans, implements, & monitors/reviews cost allocation plans & assessment methods to ensure effective financial reporting for a variety of state &/or federal financial reports
   - Performs pro forma, impact & cost-benefit analysis of past, present & future initiatives & activities
   - Reviews proposed legislation &/or policy changes to determine financial impact &/or establishes budget procedures in line with legislative/policy requirements
   - Evaluates, develops & recommends policy updates

2. **Performs other related budget duties:**
   - Prepares, reviews & recommends Controlling Board requests
   - Analyzes grant awards & approves allocations
   - Monitors & analyzes the cash flow of agency funds
   - Plans, prepares, maintains & reviews chart of accounts
   - Responds to inquiries from internal & external sources

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**MAJOR WORKER CHARACTERISTICS**

Knowledge of supervisory principles & techniques*; governmental budgeting; public finance or public or business administration; quantitative/statistical analysis; agency policies & procedures*; employee training & development*; federal &/or state statutes governing budgeting & fiscal management*; ERP systems* (e.g., OAKS FIN) &/or federal accounting system*. Skill in operation of electronic devices (e.g., computer, tablet, cell phone) & applicable software applications (e.g., spreadsheets, databases, word processing); OAKS BI reporting*. 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 governmental employees/officials, representatives of recipient organizations &/or general public; establish friendly atmosphere as unit supervisor.

(*)Developed after employment.

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**MINIMUM CLASS QUALIFICATIONS FOR EMPLOYMENT**

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.

-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.

- Or 12 mos. exp. as Senior Budget Analyst, 63262.

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

**TRAINING & 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.