

Budget & Policy Analyst – Agency

POSITION SUMMARY:

Under close supervision progressing to general supervision of the Bureau Director of Budget and Finance, perform a variety of independent professional activities relating to state and federal regulation, budget development and maintenance, procurement and purchasing practices and procedures, and development and analysis of policies and programs in the Department. Provide analysis of state and federal issues that have a significant impact on state policies and programs. Additionally, this position manages the Private On-site Wastewater Treatment System Replacement or Rehabilitation grant program (Wisconsin Fund) through the review of applications, resolutions, and ordinances submitted by Wisconsin governmental units and property owners requesting participation in the program.

This position is involved in the development and review of purchasing practices, procedures, methods, goals, and objectives. The analyst works with the Department of Administration (DOA) Purchasing Representatives assigned to the agency; coordinates the processing of formal bids; prepares advertising in accordance with DOA and legal requirements; and provides comprehensive purchasing assistance to all divisions within the agency.

This position works in close cooperation with other state agencies on agreements and interagency MOUs. The incumbent will work with the State Budget Office, State Controller Office, State Procurement Office, and Legislative Fiscal Bureau on matters pertaining to budget and finance and the DSPS budget. This position will work cooperatively with the Office of the Secretary and Division Administrators when so assigned by the Bureau Director.

GOALS AND WORKER ACTIVITIES:

30% A. Develop and monitor assigned portions of the Department's operating budget

- A1. Propose agency policies and procedures to management assuring Divisions implement authorized budgets within legislative intent. Draft as assigned.
- A2. Review initial operating budgets for assigned divisions. Identify issues, and/or opportunities. Recommend approval of operating budgets.
- A3. Review the quarterly budget status reports for assigned divisions, including preparation of vacancy reports. Evaluate sufficiency of expenditure authority and revenues. Identify issues, recommend solutions, and the need for additional analysis or action.
- A4. Prepare initial and ongoing allotment requests on the state financial systems (i.e. WISMART). Oversee the analyses of Department supplement needs, the preparation of supplement requests, and data entry of allotment requests approved by DOA or the legislature.
- A5. Review and approve expense budgets on the state financial system (i.e. WISMART).
- A6. Review and assist divisions with preparing requests for increased expenditure and position authority, per Wisconsin statutes, as assigned.
- A7. Prepare complex cost allocations to allocation department-wide costs to program divisions.

- A8. Analyze division fee proposals for reasonableness and accuracy before submission to Office of the Secretary. Prepare summary reports for the Department Secretary as directed.
- A9. Coordinate budget line transfers, as needed, to assist with fiscal year end closing. Identify opportunities to maximize Department resources within state and federal restrictions.
- A10. Respond to inquiries from congressional representatives and legislators and their staff concerning the Wisconsin economy, state policies, and departmental positions.

30% B. Coordinate Procurement / Purchasing Activities for the Department

- B1. Coordinate, monitor, and participate in the procurement and purchasing activities (materials, supplies, services, and equipment) for the agency.
- B2. Review the preparation of contracts, purchase requisitions, and purchase orders as prepared by staff. Advise support staff encumbering purchase orders and verify account balances and forward to the expenditure team for payment.
- B3. Serve as fiscal contact for staff providing staff training and develop continuous improvement programs.
- B4. Review and analyze requisitions, contact vendors regarding product or service information, prices, quotations, and specifications as needed. Participate in the preparation of bid specifications and other necessary documents related to the purchase of supplies, equipment, and materials.
- B5. Serve as the agency Administrator for the Purchase Card and the WISBuy programs.
- B6. Compile data for the purpose of analyzing issues, ensure compliance with purchasing policies and procedures. Maintain paper and electronic files and computer databases; monitoring records and data as they pertain to the agency purchases and bids. Report on agency compliance with M/W/E requirements.
- B7. Respond to inquiries from internal and external sources. Work with the fiscal expenditure processing team.

20% C. Preparation of the Department's Biennial Budget and Budget Adjustments

- C1. Provide interpretations of state and budget guidelines to divisions and program areas.
- C2. Assess program needs and assist program areas in developing budget adjustments, reallocations, and budget requests. Coordinate preparation of the department's multi-funded budget for assigned program areas.
- C3. Analyze program area budget requests for department-wide perspective, priority, accuracy, and consistency with Department objectives and justification of need. Assist in the technical development of the Department's budget request, including base year reconciliation, appropriation / program structure, all cost-to-continue requests, and budget summaries.

- C4. Monitor the budget process and provide expertise to management, the Office of the Secretary, department staff, Department of Administration and Legislative Fiscal Bureau analysts, Legislators and legislative staff, and private sector organizations in their review of the Department's budget requests.
- C5. Develop, implement and monitor, as assigned, agency, division, and program areas' operating budgets, including periodic analyses and reporting of revenues and expenditures. Prepare Decision Item Narratives (DINs) for use with budget control forms.
- C6. Prepare policy papers, statutory language and other documents necessary to explain and justify budget requests of assigned program areas to the Governor and the Legislature.
- C7. Participate in the biennial review of revenue sufficiency. Propose changes to the review method and forms as appropriate. Review specific programs as assigned.
- C8. Provide summary and history budget reports from the DOA budget (B2) system.
- C9. Verify and analyze division biennial and annual budget adjustment requests (e.g. cost-to-continue). Develop budget requests or assist program staff with data and analysis as assigned.
- C10. Enter the Department's approved budget into the State Budget System, responding to questions from the State Budget Office (SBO) on base year reconciliation and cost-to-continue requests for the department. Track the status of the agency request, and provide a summary of the amounts as it proceeds through the Executive Budget, JCF review, final legislative approval and governor vetoes.

10% D. Perform Program and Policy Comprehensive Analyses and Related Research

- D1. Gather, review, and organize data from all bureau work units to identify trends, deficiencies, and best practices related to program integrity, processing timelines, and quality control systems
- D2. Conduct planning methods including data collection through surveys and focus groups and data analyses through forecasts, projections, and impact analysis
- D3. Perform studies and other additional tasks as assigned (e.g. legislative analyses, fiscal note preparation, etc.). Assist divisions with special studies as requested. Work with internal and external customers to coordinate program requests, conduct research and troubleshoot problems or issues.
- D4. Perform research related to state statutes, administrative codes, Department of Administration policies and procedures, and federal guidelines (when applicable) pertaining to bureau financial activities. On an as-needed basis, design and conduct policy issue analyses of budget issues for assigned program areas.
- D5. Develop standardized metrics and reporting mechanisms for all bureau policy and procedures and track efficiency gains. Oversee program evaluation and reporting. Monitor and prepare reports on bureau performance.

- D6. Work with DOA Division of Enterprise Technology, DSPS staff, and others on the design, implementation, and improvement of electronic and financial systems.
- D7. Serve on intra and interagency policy development teams to ensure coordination of legislative policy functions within the Department and between the Department and the entire Executive Branch.

10% E. Coordinate and Prepare Grant Applications, Receipts, Expenditures, Reimbursements and Reporting of Federal Funds

- E1. Assist staff and managers in developing grant and match budgets. In particular this position manages the Private Sewage System Rehabilitation or Replacement Grant Program (Wisconsin Fund).
- E2. Provide guidance and assistance to staff and managers in monitoring grant expenditures and operations, to assure compliance with grant requirements and efficient use of state resources.
- E3. Monitor internal deadlines regarding grants and follow-up with division program managers, as necessary. Conduct periodic audits of select applicant files to assure compliance.
- E4. Audit applications for federal grants for funding availability and compliance with federal regulations as contained in the U.S. Office of Management and Budget (OMB) Circulars A-87, A-102, and A-133, and Chapter 16, WI Statutes. Recommend approval to the Office of the Secretary.
- E5. Conduct training sessions, if needed, for participating governmental units. Respond to inquiries on program requirements.

KNOWLEDGE, SKILLS & ABILITIES

- 1. Budgeting principles and techniques.
- 2. Knowledge of operating budgets.
- 3. Knowledge of the technical development of biennial budgets.
- 4. Knowledge of state procurement and purchasing policies and guidelines.
- 5. Accounting principles and practices.
- 6. Principles and methods of quantitative and policy analysis.
- 7. Program planning and evaluation techniques.
- 8. Policy development and administration.
- 9. Knowledge of federal funds, including grants, and their application to state programs.
- 10. Knowledge and ability to prepare cost allocations and indirect cost rate proposals.
- 11. Computer software applications (e.g., Microsoft Office, current budget or state program applications, etc.)
- 12. Ability to utilize electronic accounting and/or budget systems.
- 13. Data processing tools, including spreadsheets (e.g., Excel).
- 14. Data management and research techniques.
- 15. Problem solving and resolution skills.
- 16. Written and oral communication skills.
- 17. Interpersonal and customer service skills.