

POSITION SUMMARY:

This position serves as the Department of Employee Trust Funds (ETF) sole Budget and Policy Analyst performing advanced level work under general supervision of the Bureau of Budget, Contract Administration, & Procurement (BCAP) Director.

ETF's annual operating budget exceeds \$55.0 million. This position leads the operating budget process through all stages from initial budget development and approval through budget monitoring and fiscal year closeout. Though program areas provide budget input and the BCAP Director provides general assistance and oversight, the position exercises significant independence when performing this work. To conduct this work, the position holder interacts with staff from over 12 program areas who are comprised of senior ETF leaders and program managers. To exercise independence in this role, the position holder must have a detailed understanding of the initiatives and priorities in each program area. The position holder must also work with STAR financial data and be well-versed in using Excel to analyze and summarize budget and other financial information. Critical thinking skills and excellent verbal and written communication skills are required.

The position also plays a significant role in the development and submission of the Department's biennial budget proposal. The incumbent must:

- Complete and enter standard budget adjustments into the state budget system; and
- Assist with the development and review of biennial budget issue papers.

As an essential member of ETF's finance team, this position will be relied upon to provide advice and recommendations that directly impacts ETF's operations. This position works closely with executive leadership, senior managers, and key staff in response to a variety of policy and budget issues that cover a broad range of topics and program areas depending on agency needs. Examples of potential areas of interest include:

- developing and updating budget and financial metrics used for internal operations and board reporting; and
- helping create and implement a program for managing vendor performance (ETF has annual contract spending exceeding \$1.5 billion for health care benefit programs, actuarial services, federal tax council, IT modernization projects, etc.).

The priorities of work assignments for this position and work methods are advisory in effect, leaving the incumbent considerable discretion to develop approaches to analysis within statutory and policy constraints. The incumbent is responsible for finished products and decisions made. Useful precedents may not exist for many of the issues the incumbent may need to address. Work products are reviewed for responsiveness to goals and objectives and consistency with department policy.

GOALS and WORK ACTIVITIES:

20% Goal A. Development of Agency Annual Operating Budget

- A1. Facilitate Division lead planning meetings with Agency Divisions and Offices.
- A2. Establish the annual operating budget process, including updating the instructions and forms.
- A3. Develop cost-to-continue budgets for each of ETF's program areas based on current and prior year spending and prior year budget projections.
- A4. Develop the Department's unallocated budget, estimating the amount for centrally budgeted items including permanent and project staff salary costs, fringe costs, and rent.
- A5. Collaborate with each program area to finalize their proposed budgets, which includes scheduling and facilitating meetings, reviewing preliminary cost-to-continue budgets, and resolving outstanding budget issues.
- A6. Analyze requests for additional/new budget items, such as overtime, new contract staff requests, contract staff rate increases, and other new non-staffing budget items.
- A7. Accurately track and report annual Agency spending authority.
- A8. Consolidate and analyze the impact of budget needs across the department.
- A9. Present preliminary budget analysis to senior leaders and the Executive Team.
- A10. Track and communicate annual budget decisions to program areas.
- A11. Facilitate approval of the budget within 45 days of the new fiscal year start on July 1st.

40% Goal B. Administration of Agency Annual Operating Budget

- B1. Oversee the agency administrative appropriations and budget allotments.
- B2. Serve as the agency point of contact with the assigned analyst in the state budget office.
- B3. Prepare and submit agency requests for increased spending authority, position requests, supplements.
- B4. Monitor, report, and conduct analyses on agency operational spending, including metrics, to Department managers and executive staff.
- B5. Analyze spending in relation to current budget projection each month and determine if any additional action is needed.
- B6. On a quarterly basis, review spending in relation to current budget by facilitating meetings with program areas (only Q2 and Q3) and sharing this information with the Executive Team.
- B7. Develop operational resource forecasts and projections, develop spending plans, and conduct return on investment analyses for the agency's Modernization program, which is designed to replace numerous legacy business applications.
- B8. Consult with the Division of Trust Finance in the allocation of agency administrative costs to the several benefit plans administered by the department [s.40.04(2)(c) Wis., Stats.].
- B9. Collaborate with the Data Management Team to develop, revise, and maintain budget-related agency dashboards.

- B10. Develop and implement policies for budget items, including overtime/extra hours and additional hours for contract staff, and ensure compliance throughout the fiscal year.
- B11. Provide regular quarterly budget and spending updates to the modernization cost tracker and board memo.
- B12. Analyze and provides comments on the budget impact of permanent and contract staff requests as part of the bi-monthly position review process.

15% Goal C. Development of Assigned Components of Department's Biennial Budget Request

- C1. Review internal biennial budget request instructions and forms.
- C2. Conduct analysis of budget issues and develop and review budget issue papers related to a variety of topics, such as: resource issues to address on-going/changing workload, IT modernization initiatives, business intelligence and data analytics needs, legislative changes to programs, vendor management and contract administration.
- C3. Lead technical portions of the biennial budget including activities such as base budget review, base budget reconciliation (B-9) and title maintenance, position reconciliation, upfront documents, revenue and balances statement (B-3), standard budget adjustments Act 201 analysis, and annuity supplement re-estimate.
- C4. Enter and format ETF's biennial budget information into the State's biennial budget system, including budget analysis forms (B-2), position and salary worksheet (B-10), and DIN narratives.
- C5. Provide final budget numbers to the legislative liaison for inclusion into the biennial budget memo to the board.
- C6. Serve as the point of contact on biennial budget related questions from the DOA Budget Office.
- C7. Prepare estimates, summaries, and other briefing materials for executive staff and the BCAP Director.
- C8. Work with the legislative liaison and BCAP Director to monitor and communicate biennial budget developments throughout the budget process.

15% Goal D. Participation in Analysis of Department Issues

- D1. Conduct other work, including special projects, as assigned by the BCAP Director, DMS Senior Management, or the Department Executive Team.
- D2. Review previously adopted department policies, develop and participate in additional analysis that may lead to changes or continued endorsement of those policies.
- D3. When additional analysis is required, assist in developing a study design, apply appropriate analytical techniques, draft conclusions for discussion, and discuss results with management.
- D4. Evaluate the consistency of department activities with adopted policies at the request of management or other units.

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- D5. As a team member or leader, help other departmental units implement adopted policies by identifying analytical techniques, converting analytical techniques to departmental procedures or rules, and preparing other staff to use the appropriate techniques.
- D6. Perform analysis of legislation, regulations, guidelines, and agency policies/procedures to identify current practices and changes that would result in potential efficiencies.
- D7. Conduct attestation of access and roles for agency financial systems (i.e., STAR).

10% Goal E. Provision of General Support and Back-up for Other BCAP Functions

- E1. Perform back-up responsibilities for other BCAP finance and procurement and contract administration staff.
- E2. Manage approval of purchase orders and vouchers and expense coding for compliance with state budget and accounting policies and rules and agency operating budget management strategies and practices.
- E3. As needed, help train new staff in the unit on budget back-up and other responsibilities.
- E4. Research and identify relevant professional development training opportunities. Request approval for relevant trainings from BCAP Director.
- E5. Participate in BCAP-related internal or external audit activities, including responding to auditor inquiries and helping address any budget and/or financial audit findings.

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KNOWLEDGE, SKILLS, and ABILITIES

1. Advanced knowledge of quantitative and qualitative analysis techniques necessary for policy analysis, planning, and program evaluation.
2. Knowledge of Wisconsin Statutes, Chapter 20.
3. General knowledge of ETF administered benefit plans and programs.
4. Knowledge and demonstrated ability in data analytics, metrics, and benchmarking, including collection and manipulation.
5. Ability to think critically and resolve problems independently and/or collaboratively.
6. Ability to interpret large amounts of data and complex information and exercise sound judgement.
7. Excellent organization and prioritization skills to establish and meet multiple assignment deadlines with competing priorities.
8. Excellent effective written and oral communication skills including developing and delivering technical information to non-technical audiences.
9. Ability to develop and maintain strong positive working relationships with all levels of diverse internal and external customers and stakeholders.
10. Ability to provide advanced technical consultation on sensitive and complex matters affecting the financial health of the Department.
11. Ability to use discretion when dealing with confidential matters.
12. Intermediate skill and ability in the use of PCs, general office software, and automated financial systems.
13. Knowledge of software used for policy, budget, and fiscal analysis.
14. Advanced skills in the use of MS Excel, including complex formulas, pivot tables, and VLOOKUP.
15. Knowledge and skill related to the development, implementation, and management of biennial and annual operating budgets.
16. Knowledge and skill related to the development of expenditure and revenue reports, including revenue and expenditure estimation methodologies.
17. Ability to understand and comply with all ETF and enterprise standards, policies, processes, and procedures.
18. Strong attention to detail.
19. Ability to perform and correctly apply accurate mathematical and statistical calculations.
20. Knowledge and skill in identifying issues that require additional research and focus, with the ability to independently document research for further consideration.