

STATE OF WISCONSIN  
CLASSIFICATION SPECIFICATION

BUDGET AND POLICY ANALYST-AGENCY  
CLASSIFICATION SERIES

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under Wisconsin Administrative Code ER 2.04 for making classification decisions relative to present and future professional positions located in an agency's central budget office which perform budget and policy analysis duties. This classification specification is not intended to identify every duty which may be assigned to positions but is intended to serve as a framework for classification decision making in this occupational area.

Classification decisions must be based on the "best fit" of the duties within the existing classification structure. The "best fit" is determined by the majority (i.e., more than 50%) of the work assigned to and performed by the position when compared to the classification concepts and definition of this specification or through other methods of position analysis. Position analysis defines the nature and character of the work through the use of any or all of the following: definition statements; listing of areas of specialization; representative examples of work performed; allocation patterns of representative positions; job evaluation guide charts, standards, or factors; statements of inclusion and exclusion; license or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification series encompasses professional positions located in an agency's central budget office which perform budget and policy analysis duties. Positions allocated to this series develop and monitor the department's biennial and annual operating budgets; assist organizational units on budget development and implementation activities or perform such duties at the departmental level for specific assigned program(s); estimate and monitor revenue collections; conduct program, organizational, policy, legislative, and fiscal analyses; prepare fiscal estimates for proposed legislation; develop and maintain the agency's appropriation structure; prepare and submit to the Department of Administration (DOA) the reconciled base budget and all budget forms; draft statutory language to implement budget requests; review agency operating budgets and requests for increased spending authority and positions; ensure that funds are used in accordance with legislative intent; prepare and submit all agency requests for supplements; review applications for federal funds and allot across state fiscal years; draft agency plan(s) for spending reductions; participate in the planning of capital improvement projects, including new institutions and major remodeling of existing institutions; prepare and publish a Part I Program Statement for each capital budget project; prepare cost estimates for long-range plans; develop monthly Building Commission budget requests; and analyze population trends to determine future needs for bed

space and new facilities. NOTE: Positions in some agencies may not perform policy analyses or develop annual operating budgets, but would still be appropriately classified in this series if the majority of the positions' time is spent on budget duties.

Positions allocated to this series must meet the statutory definitions of professional employee and confidential, as defined in s. 111.81(15) and (7), Wis. Stats.

C. Exclusions

Excluded from this classification series are the following types of positions:

1. Positions which do not meet the statutory definitions of professional employee and confidential, as defined in s. 111.81(15) and (7), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.
2. Positions which meet the statutory definition of supervisor, as defined in s. 111.81(19), Wis. Stats., as administered and interpreted by the Wisconsin Employment Relations Commission.
3. Positions which perform budget and policy analysis work at the division level for a majority of the time and are more classified as Budget and Policy Analyst-Division.
4. Positions which perform accounting or auditing work for a majority of the time and are more appropriately classified as Accountant or Auditor.
5. Positions which provide budget and policy advice to agencies, the Governor, and the Legislature for a majority of the time, and are more appropriately classified as Executive Policy and Budget Analyst.
6. All other positions which are more appropriately identified by other classification specifications.

D. Entrance Into and Progression Through This Classification Series

Entrance into this classification series is typically by competitive examination. Progression to the advanced level within large or major agencies is typically through reclassification, as the employee satisfactorily attains the specified training, education, or experience.

## II. DEFINITIONS

### **BUDGET AND POLICY ANALYST-AGENCY**

This is professional, confidential work related to the analysis of budgets and policies. Positions allocated to this classification are located in the agency's central budget office and develop and monitor the agency's biennial and annual operating budgets or perform such duties at the agency level for specific assigned program(s); assist organizational units in budget development and implementation activities; estimate and monitor revenue collections or cash balances; conduct program, organizational, policy, legislative, and fiscal

analyses; prepare fiscal estimates for proposed legislation; develop cost-to-continue decision items; assist in preparing the agency's reconciled base budget; review agency operating budgets and requests for increased spending authority and positions; review agency operating budgets and requests for increased spending proposals; participate in the planning of capital improvement projects, including new institutions and major remodeling of existing institutions; prepare and publish a Part I Program Statement for each capital budget project; prepare cost estimates for long-range plans; develop monthly Building Commission budget requests; and analyze population trends to determine future needs for bed space and new facilities.

Positions which perform budget duties on a statewide, multi-agency basis, such as those positions in DOA's Capital Budget Section, would also be included in this classification series. Work is performed under close, progressing to general, supervision.

Positions allocated to this level are located in medium-sized (less than 500 FTE) or smaller agencies.

### **BUDGET AND POLICY ANALYST-AGENCY-ADVANCED**

Positions allocated to this classification perform all of the duties identified at the Budget and Policy Analyst-Agency level. Positions allocated to this level are located in large or major agencies (500 or more FTE) and perform budget and policy analysis duties for an agency budget program of greater complexity and with a wider variety of funding sources than those positions allocated to the Budget and Policy Analyst-Agency level. Positions may function as leadworkers over a team of other Budget and Policy Analyst-Agency positions within an agency's central budget office. Work is performed under general supervision.

### **III. QUALIFICATIONS**

The qualifications required for these positions will be determined at the time of recruitment. Such determinations will be made based on an analysis of the goals and worker activities performed, and by an identification of the education, training, work, or other life experience which would provide reasonable assurance that the knowledge and skills required upon appointment have been acquired.

### **IV. ADMINISTRATIVE INFORMATION**

This classification series was created effective May 20, 2001, and announced in Bulletin CLR/SC-130, in order to describe positions which perform budget and policy analysis work for an agency. This classification series replaces the Budget and Policy Analyst-Agency-Entry and Journey levels (but maintains the existing Advanced level). This classification series was created in order to simplify the classification system and to expand the broadband pay system to non-represented classifications.

WAM/SKN  
09610