

STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION

BUDGET AND POLICY ANALYST-DIVISION
CLASSIFICATION SERIES

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Admin. Code, for making classification decisions relative to present and future professional positions located within a division of a state agency or institution which perform budget and policy analysis duties for an assigned division or institution. 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 within a division of a state agency or institution which perform budget and policy analysis duties for an assigned division or institution. Positions allocated to this series develop and monitor the assigned division or institution biennial and annual operating budgets; work with the agency’s central budget office in budget development and implementation activities; and conduct program, organizational, policy, legislative, and fiscal analyses. Positions allocated to this series must meet the statutory definitions of confidential, as defined in s. 111.81(7), Wis. Stats and the definition of professional, as defined in Sec. 370.030 of the Wisconsin Human Resources Handbook.

NOTE: There will be only one Budget and Policy Analyst-Division per division or institution, and the Analyst must be responsible for all organizational units, programs, and funding sources within that division or institution, unless specified otherwise in this classification specification.

EXCEPTION TO NOTE: Divisions within the Department of Health Services (DHS), specific divisions within the Department of Transportation (DOT), the Division of Energy, Housing and Community Resources within the Department of Administration, and the Division of Employment & Training within the Department of Workforce Development are allocated more than one Budget and Policy Analyst-Division-Advanced position within one division. These

exceptions are due to the complexity of the work, which involves independent responsibility for multi-million-dollar budgets, with a large number and variety of funding sources (typically including a multitude of grant funds and related budget forecasting needs) and complex governing rules and regulations, and the monitoring of programs with the highest public visibility of a controversial or politically sensitive nature, or dynamic programs which experience frequent changes due to legislative or programmatic initiatives. DHS Budget and Policy Analysts-Advanced can be assigned budget and policy responsibilities for organizational units, programmatic areas of responsibility, or funding sources.

C. Exclusions

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

1. Positions which do not meet the statutory definitions of confidential, as defined in s. 111.81(7), as administered and interpreted by the Wisconsin Employment Relations Commission.
2. Positions which do not meet the definition of professional, as defined in Sec. 370.030 of the Wisconsin Human Resources Handbook.
3. 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.
4. Positions which are located within an agency's central budget office and perform central office budget and policy analysis work for a majority of the time, and are more appropriately classified as Budget and Policy Analyst-Agency.
5. Positions which perform accounting or auditing work for a majority of the time and are more appropriately classified as Accountant or Auditor.
6. 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.
7. 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 by competition. Progression to the advanced level is typically through reclassification, as the employee satisfactorily attains the specified training, education, or experience. NOTE: The advanced level is only for positions within the largest divisions or institutions, with the most complex budgets.

II. DEFINITIONS

BUDGET AND POLICY ANALYST-DIVISION

This is professional, confidential work related to the analysis of budgets and policies. Positions allocated to this classification are located within a division of a state agency or institution, and perform budget and policy analysis duties for an assigned division or institution. Positions allocated to this classification develop and monitor the assigned division or institution biennial and annual operating budgets; work with

the agency's central budget office in budget development and implementation activities; and conduct program, organizational, policy, legislative, and fiscal analyses. Work is performed under close, progressing to general, supervision.

BUDGET AND POLICY ANALYST-DIVISION-ADVANCED

This is professional, confidential work related to the analysis of budgets and policies. Positions allocated to this classification are located within a division of a state agency or institution and perform budget and policy analysis duties for an assigned division or institution. Positions allocated to this series develop and monitor the assigned division or institution biennial and annual operating budgets; work with division program managers and the agency's central budget office in budget development and implementation activities; and conduct program, organizational, policy, legislative, and fiscal analyses. Work is performed under general supervision.

Advanced-level positions perform budget and policy analysis duties for the largest divisions or institutions, with the most complex budget programs. Indicators of budget program complexity include: a large number and variety of funding sources with complex governing rules and regulations (General Purpose Revenue – GPR, Program Revenue – PRO, Segregated – SEG, or Federal – FED); a large number and variety of divisional or institutional programs; and divisional or institutional programs with higher public visibility and more potentially controversial or politically sensitive or dynamic programs which experience frequent changes due to legislative or programmatic initiatives.

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 a division of a state agency, institution, or campus. This classification series replaces the Budget and Policy Analyst-Division-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. This classification was modified effective March 5, 2017, and announced in Bulletin DPM-0440-CC/SC to allow the Division of Energy, Housing and Community Resources within the Department of Administration to have more than one position in this classification following the merger of the Division of Energy Services and the Division of Housing

This classification series was modified effective December 3, 2023, and announced in Bulletin DPM-0615-CC/SC, to allow for more than one Budget and Policy Analyst – Division – Advanced in the Division of Employment & Training within the Department of Workforce Development. This exception was added due to the large number of grants and funding sources the division is working with.

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