

Effective Date: October 12, 1997
Modified Effective: November 13, 2005
Modified Effective: July 14, 2013
Modified Effective: December 29, 2024

STATE OF WISCONSIN
CLASSIFICATION SPECIFICATION

BUDGET AND POLICY MANAGER

I. INTRODUCTION

A. Purpose of This Classification Specification

This classification specification is the basic authority under ER 2.04, Wis. Adm. Code, for making classification decisions relative to present and future professional supervisory and management positions which administer and manage departmental budget and policy programs. 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 class 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; licensure or certification requirements; and other such information necessary to facilitate the assignment of positions to the appropriate classification.

B. Inclusions

This classification encompasses professional supervisory and management positions which administer and manage departmental budget and policy programs. Positions allocated to this classification function as the Director or Deputy Director of an agency budget and policy program; administer the development and monitoring of the department's biennial and annual operating budgets; direct and coordinate professional staff conducting budget and policy analyses, including program policy, organizational, legislative and fiscal analyses; and meet the statutory definitions of supervisor and management as defined in Wis. Stats. 111.81(19) and (13).

This classification also encompasses positions in: the Department of Administration having extensive responsibility and authority for managing the utilization of and planning for the state's owned and leased real estate or managing the development and implementation of the approximately \$1.0 billion Capital Budget as lead staff to the State Building Commission. OR, a single position in the Department of Health Services, Office of Grants Management which maintains responsibility for oversight and administration of \$800,000,000+ in grant/contract funds for the agency

Positions in this classification are responsible for budget development, program planning, policy and procedure input and development, budget and supervision of staff within their respective program area.

C. Exclusions

Excluded from this classification are the following types of positions:

1. Positions which perform for a majority of the time the duties and responsibilities assigned to positions classified as Budget and Policy Analyst.
2. Positions which do not meet the statutory definitions of supervisor and management as defined in Wis. Stats. 111.81(19) and (13).
3. All other positions which are more appropriately identified by other classification specifications.

D. Entrance Into This Classification

Employees enter positions within this classification by competition.

II. DEFINITION

BUDGET AND POLICY MANAGER

Positions in this classification are professional supervisory and management positions which function as: **(1)** the Budget and Policy Manager for a small agency (less than 100 FTE), medium agency (less than 500 FTE), large agency (more than 500 FTE, but less than 1,000 FTE), a major agency (more than 1,000 FTE); or **(2)** the Deputy Budget and Policy Manager for a large agency (more than 500 FTE, but less than 1,000 FTE) or a major agency (more than 1,000 FTE); or **(3)** the Director of the Bureau of Space Management and Occupancy within the Division of Facilities Management at DOA, responsible for managing the utilization of and planning for the state's owned and leased real estate. The Division is responsible for managing the occupancy of state office buildings totaling more than 3.5 million square feet and managing over 450 leases covering 30 million square feet in private buildings; or **(4)** the Director of the Bureau of Capital Budget & Construction Administration within the Division of Facilities Development at DOA. The position is responsible for the development of the State Capital Budget and All Agency Budget for the University of Wisconsin System and all other agencies. The position manages the implementation of the State Building Program approved by the Governor and the State Building Commission, including the evaluation of agency capital improvements and long range facility plans; or **(5)** the Director of the Office of Grants Management (OGM) in the Department of Health Services. The position is responsible for the centralized DHS grant/contract programs valued at over \$800,000,000; the position will establish agency policies and procedures for the entire grant life cycle and contract development, compliance with federal requirements, and oversee grant methodologies, processes for fund allocation, and impact of grants/contracts on division budgets. 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 specification was created effective October 12, 1997, as part of the new Senior Manager Program (see Bulletin CC/SC-76), and resulted from the collapsing and abolishment of the Budget and Policy Officer 1, 2, and 3 classifications which were created effective June 26, 1994 as a result of the Budget Survey (see Bulletin CC/SC-21). This classification specification was modified effective November 13, 2005 and announced in bulletin OSER XX MRS/SC XX to reflect the inclusion of the responsibilities of a position in the Department of Administration.

This classification specification was modified effective July 14, 2013 and announced in Bulletin OSER-0333-MRS/SC to add an allocation to account for the splitting of the Division of State Facilities at DOA into two divisions.

This classification specification was modified effective December 29, 2024 and announced in Bulletin DPM-0635-CC/SC to add an allocation for the Director of the Office of Grants Management (OGM) in the Department of Health Services. The OGM was authorized by the Governor's Office and DOA to centralize DHS's grant program valued at over \$800,000,000 at the time of creation in 2024 in follow-up to findings by the Legislative Audit Bureau that identified a need for better tracking and standardization of processes across the agency.

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