

STATE OF WISCONSIN  
CLASSIFICATION SPECIFICATION

EXECUTIVE POLICY AND BUDGET ANALYST  
ENTRY, JOURNEY, SENIOR, ADVANCED  
CLASSIFICATION SERIES

I. INTRODUCTION

A. Purpose of this Classification Specification

This classification specification is the basic authority [under Wis. Admin. Code ER-Pers 2.14(2)] for making classification decisions relative to present and future professional positions located within the Department of Administration's Division of Executive Budget and Finance. Positions allocated to this series assist assigned operating agencies in the preparation of budget requests, annual operating plans, and implementation of the agencies' responsibilities; advise and assist the Governor and the Secretary of the Department of Administration in the development and implementation of the state budget; and provide policy, fiscal and administrative analysis of proposed, pending and passed legislation to aid the Governor's legislative program. This classification specification will not specifically identify every eventuality or combination of duties and responsibilities of positions that currently exist, or those that result from changing program emphasis in the future. Rather, it is designed to serve as a framework for classification decision-making in this occupational area.

B. Inclusions

This series encompasses professional positions, located within the Department of Administration's Division of Executive Budget and Finance, which assist assigned operating agencies in the preparation of budget requests, annual operating plans, and implementation of the agencies' responsibilities; and advise and assist the Governor and the Secretary of the Department of Administration in the development and implementation of the state budget. Positions within this classification series conduct policy and budget options research with special emphasis on applying quantitative methods, financial analysis techniques and economic research to state and local finance issues; provide budget advice and analysis in order to help agencies, the Governor and the Legislature in their deliberation on state resource allocation; provide policy, fiscal and administrative analysis of proposed, pending and passed legislation to aid the Governor's legislative program; and provide financial and new position analysis to the State Budget Director to determine their soundness in terms of both fund and position management, and legislative and executive intent.

C. Exclusions

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

1. Positions that perform budget and management analysis within operating agencies.
2. Positions that function as executive policy and budget analysis team leaders within the Department of Administration's Division of Executive Budget and Finance.
3. All other positions, which are more appropriately, identified by other classification specifications.

D. Entrance and Progression through This Classification Series

Employees typically enter this classification series by competitive examination for entry-level positions. Employees with exceptional qualifications such as previous Budget and Management Analyst experience in an operating agency budget office for a complete budget cycle may enter this classification series by lateral transfer. Progression to the Advanced level typically is through reclassification if warranted.

E. Classification Factors

Individual position allocations are based upon the general classification factors described below:

1. The freedom or authority to make decisions and choices and the extent to which one is responsible to higher authority for actions taken or decisions made;
2. Information or facts such as work practices, rules, regulations, policies, theories and concepts, principles and processes which an employe must know and understand to be able to do the work;
3. The difficulty in deciding what needs to be done and the difficulty in performing the work;
4. The relative breadth, variety and/or range of goals or work products and the impact of the work both internal and external to the work unit;
5. Type of supervision received;
6. Organizational status as it relates to level of responsibility; and
7. The nature and level of internal and external coordination and communication required to accomplish objectives.

F. How to Use this Classification Specification

This classification specification is used to classify professional positions as described under Section B of this classification specification. In most instances, positions included in this series will be clearly identified by one of the classification definitions, which follow in Section II.

However, a position may evolve or be created that is not specifically defined by one of the classification definitions. In classifying these positions, when work activities overlap several adjacent classes within this series, the importance, autonomy, and frequency of these activities impact the final classification decision.

## II. DEFINITIONS

### EXECUTIVE POLICY AND BUDGET ANALYST - ENTRY

Under close supervision, positions provide budget advice and analysis in order to help agencies, the Governor, and the Legislature in their deliberations on state resource allocations; provide financial and new position planning analysis to the State Budget Director to determine soundness of fund and position management and legislative intent; provide policy, fiscal and administrative analysis of proposed, pending and passed legislation to aid in the Governor's legislative functions and develop recommendations on whether bills should be vetoed or signed; prepare budget and policy issue analyses to assist the Governor and the Legislature in deliberations on major state policy directions; and provide staffing on special assignments.

Positions receive specific guidelines and instructions from the supervisor on work assignments, and the supervisor determines the priorities and provides clearly defined objectives. Work assignments are established by the supervisor on a short-term basis and the position's work is reviewed daily.

Positions interact with counterparts in agencies, but generally not top management officials; and the supervisor normally accompanies the analyst to briefings and meetings and takes the lead in briefing officials, allowing the analyst to fill in details.

This entry-level professional class requires specialized skills to conduct and continually analyze methods, systems or procedures. Activities have specific objective and content. Provides required information to supervisor by summarizing findings, identifying problems areas and recommending methods to improve operations.

### **EXECUTIVE POLICY AND BUDGET ANALYST - JOURNEY**

This is Journey level Executive Policy and Budget Analyst work, performing all of the duties identified under the Entry definition, but differing in that work assignments are established on both a long-term and short-term basis.

Objectives are stated in broad terms without specific direction. The supervisor reviews the work after it is completed to determine completeness and adherence to policy. Positions at this level are often involved in meeting with agencies' management officials on policy discussions without the supervisor.

Positions at this level continually make more sensitive decisions and recommendations and function under limited progressing to general supervision. This professional class requires a foundation in the principles of a general field of knowledge related to topic specific policy analysis or operations.

### **EXECUTIVE POLICY AND BUDGET ANALYST - SENIOR**

This is Senior level Executive Policy and Budget Analyst work differing from the Entry and Journey level positions in that work assignments are long-term and broadly defined in relation to the position's total assignment.

Positions develop and work on major work products with little or no specific direction or review; and the supervisor reviews the work after it is completed for informational or evaluation purposes.

Positions at this level assume a nearly independent role in working with agency officials, policy staff and the Secretary on issue areas and work assignments often cross agencies' program or functional areas of responsibility.

Analysts may coordinate working groups on issue development, provide solutions, and direct negotiations on complex issues. Positions at this level make more decisions independently on more sensitive and political matters.

Under general supervision, this professional class builds upon the foundation of the principles of a general field of knowledge sufficient to critique and evaluate the activities and outcomes of the professional work of staff from other agencies.

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

Under general supervision, as the recognized departmental expert, direct and/or conduct and execute very complex studies for areas with little or no procedural precedent which have major department and/or statewide policy implications. This advanced level professional class requires a broad grasp of advanced principles and

theories of a specialized field of knowledge and demonstrates the strongest analytic technical and communication skills. Advises the Governor, department decision-makers, the legislature or others on events or program conditions to communicate significant developments and issues by performing a complete analysis.

The analyst develops and follows their own broadly defined work objectives and the review of the work is limited to broad administrative evaluation by the supervisor. Provides training and consultation to junior analysts and may lead them in project work. May serve on outside agency task force or staff a gubernatorial commission.

Positions at this level have extensive authority to deal with agency top officials, policy staff, the Secretary and the Legislature, especially in highly sensitive and complex issues and areas.

### **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.

Seek skills in quantitative and qualitative public policy research, research management, interpersonal relations, and communications, as well as familiarity with state government.

### **IV. ADMINISTRATIVE INFORMATION**

This classification was created effective March 12, 2000 to replace the Executive Policy & Budget Analyst 1 classifications to accommodate the expansion of the broadband pay structure. The Executive Policy & Budget Analyst 1-5 classifications were abolished on the same date and announced in Bulletin CLR/SC-109.

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