

**Oregon State Legislature
Legislative Fiscal Analyst - Principal
Job Description**

Classification Title	Legislative Fiscal Analyst - Principal		
Job Code:	9758	Job Family:	Legislative
Pay Grade	18	Date Reviewed:	
FLSA Status	Exempt	Date Revised:	4/2020

GENERAL SUMMARY

Provides complex research, analysis, evaluation, and recommendation to the Legislature regarding the State's budget, including revenue, expenditures, staffing, agency operations, and program administration. Develops policy and budget recommendations for the Legislative Assembly and assigned Committees.

REPORTING RELATIONSHIPS

Reports to the Legislative Fiscal Officer.

DISTINGUISHING CHARACTERISTICS

The Legislative Fiscal Analyst- Principal is considered an expert and is the highest level of this job family. The position is assigned to the more complex state agency budgets and/or has oversight of the more complex and costly programs and projects. Like the Senior Legislative Fiscal Analyst, a significant amount of their time involves budget development. They are typically assigned to provide committee administration, staff, and scheduling support to a committee or subcommittee and coordinate a major program area of the state budget.

ESSENTIAL DUTIES & RESPONSIBILITIES

The intent of this job description is to provide a representative summary of the major duties and responsibilities performed by incumbents of this job. Incumbents may be requested to perform job-related tasks other than those specifically presented in this description.

1. Makes budget recommendations to the legislature. Identifies and analyzes budget issues and develops options and recommendations for addressing them. Identifies resources available to finance state expenditures.
2. Ensures that budget information and fiscal impact statements are consistent with statutory requirements, budget assumptions, and established budget development rules or processes.
3. Coordinates, monitors, and oversees budgeted program area. Tracks program area budget numbers and prepares summary information for the program area. Presents budget information to committees and boards.

4. Reviews key performance measurement reports of state agencies and makes recommendations on continuance, modification, addition, or abandonment of performance measurements. Reviews state agencies' budget execution and operations.
5. Reviews information such as audits and strategic plans. Makes recommendations on any changes that should be considered by the Legislature
6. Answers legislators' questions about programs or budget recommendations.
7. Assists bill carriers by preparing floor speeches and helping answer questions.
8. Work directly with Joint Committee on Ways and Means, interim budget committees, and legislative leadership to modify and affect budgetary recommendations in accord with legislative goals.
9. Briefs legislators on budgeted program areas, state agency budgets and programs, proposed budget reductions and enhancements, and other budget issues.
10. Analyzes proposed legislation to determine if amendments are needed to implement policy and budget goals. Assists in the development of legal documents for adoption by committees and legislative bodies. Develop narrative for inclusion in budget documents that conveys legislative intent.
11. Develops and provides training to committee/subcommittee members on budget information and process steps for budget review, development, and approval. Prepares materials for budget committee review and action.
12. Plans and coordinates scheduling of agency presentations and action on budget/policy bills in subcommittees.
13. Serves as the subject-matter expert and primary contact for program area questions. Provides guidance and support on budget issues.
14. Conducts field work to research agencies and programs. Reviews laws, rules, and policies. Reads program area literature. Meets with agency staff, stakeholders, and key legislators.
15. Analyzes budget proposals to determine their fiscal and policy merit. Monitors agency expenditures and program implementation.
16. Publishes detailed analyses, summary documents, and briefs on budget-related topics.
17. Analyzes proposed legislation. Prepares and reviews fiscal impact statements.

KNOWLEDGE, SKILLS & ABILITIES.

- **Knowledge of:**
 - Bonding and debt management rules, laws, standards, and best practices
 - State and federal laws and regulations affecting state programs and budgets
 - The legislative process, budget policy, budget development principles
 - Oregon Accounting Manual

- State financial, budget, and position control systems, including the State Financial Management System (SFMA), Oregon Budget Information Tracking System (ORBITS), Workday, Oregon Legislative Information System, and Fiscal Impact and Staff Measure Summary Systems
 - Committee and chamber rules
 - State programs and budgets
 - Rules, laws, standards, and best practices applicable to respective program area
 - State agency operations, government finance, budgeting, and state financial, position, and budgeting systems
- **Skill in:**
 - Problem solving and critical thinking
 - Verbal and written communication
 - Time management and planning
 - Analyzing program outcomes, trends, and budget status
- **Ability to:**
 - Understand complex government programs and budgets
 - Explain technical information in an easy-to-understand manner to groups with a wide range of technical knowledge
 - Extrapolate, examine, and use information and data to ascertain facts and translate technical information into concise documents
 - Evaluate qualitative information and knowledge of quantitative methods
 - Remain unbiased and non-partisan
 - Understand legislative priorities and concerns
 - Utilize and enter data into financial systems
 - Present information to committees and make recommendations for changes in statutes, policies, procedures, budgets, staffing and performance measurements
 - Propose and analyze statutory changes

MINIMUM JOB REQUIREMENTS

Bachelor's degree and at least nine (9) years of related experience.

- An equivalent combination of education and experience sufficient to demonstrate ability to perform the duties of the position *may* be considered.

OTHER REQUIREMENTS

None.

WORKING CONDITIONS

The work environment characteristics described here are representative of those an employee encounters while performing the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Positions in this class have good working conditions relatively free from unpleasant environmental conditions or hazards. Office environment.

PHYSICAL DEMANDS

The physical demands described here are representative of those that must be met by an employee to successfully perform the essential functions of this job. Reasonable accommodations may be made to enable individuals with disabilities to perform the essential functions.

Sedentary Work – Depending on assignment, positions in this class typically exert up to 10 pounds of force occasionally, a negligible amount of force frequently, and/or constantly having to lift, carry, push, pull or otherwise move objects. Sedentary work involves sitting most of the time. Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.