

PART I	HAWAII HEALTH SYSTEMS CORPORATION	2.921
	STATE OF HAWAII	2.922
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BUDGET ANALYST SERIES
SR-16; SR-18; SR-20; SR-22; SR-24; SR-26
BU:13

BUDGET ANALYST I 2.921

Duties Summary:

Serves in a trainee capacity, learning and applying the basic principles, methods, concepts, techniques, procedures, work process, policies, and regulations of budget analysis and management analysis work; and performs other duties as required.

Distinguishing Characteristics:

This is the entry level trainee class designed to provide an introduction to the background, principles, concepts and scope of budget and management analysis work for HHSC and/or its' facilities/region; an overall knowledge of the organization, purpose and functions of HHSC and/or its' facilities/region. Work assignments are routine and clear cut and are designed to provide experience in the principles and procedures of budget analysis and management analysis. Supervision is close and immediate with detailed instructions, review and evaluation provided for on assignments selected for training purposes.

Examples of Duties:

Attends orientation and training sessions; learns the principles, techniques, concepts and work processes, fundamental to budget analysis and management analysis; performs simple tasks for the purpose of gaining knowledge and developing skill in the application techniques and work processes in budget analysis and management analysis, such as: reviewing previous reports to learn the bases for prior requests, prior actions taken and their bases, and the kinds of reports required for different requests; gathering and compiling data for review and evaluation by a higher level analyst; and making preliminary evaluations of requests from generally stable programs; studies and becomes familiar with available guidelines and references including State laws, policies, procedures and directives, HHSC policies, procedures, standards and instructions, organizational charts, and functional statements.

Knowledge and Abilities Required:

Knowledge of: General principles of public administration; government organizations and functions; socioeconomic conditions affecting government operations and statistical methods used in the social sciences.

Ability to: Learn the basic concepts, principles, methods and techniques of budget analysis work; learn and apply laws, rules and regulations applicable to the budget and management analysis process; read, comprehend, analyze and interpret written tabular and graphic material associated with budget processes; follow oral and written instructions; locate source material and conduct simple library research studies; maintain effective working relationships with others; formulate ideas and present them clearly and concisely, orally and in writing.

BUDGET ANALYST II

2.922

Duties Summary:

Performs a variety of simple to moderately difficult work assignments in the procedural and technical aspects of budget and management analysis requiring the application of some knowledge of the principles, methods and procedures relating to the work; and performs other duties as required.

Distinguishing Characteristics:

This class performs simple to moderately difficult budget analysis and management analysis work assignments involving clearly established principles, methods and techniques under specific guidance. Assignments are generally characterized by clear and specific objectives to be reached and are selected to provide training to develop the employee for work of a higher level involving greater familiarity and understanding of programs within HHSC.

Supervision is relaxed on simple, routine and/or recurring assignments, but is close and immediate for new assignments and/or those of a more difficult and complex nature. The incumbent trainee receives additional assignments characteristic of a higher level Budget Analyst for training purposes as the trainee's skills and abilities increase.

The worker is expected to perform assignments with increased familiarity as to location and kinds of resources available and to develop reference sources, as the need arises. The work performed and the recommendations made are reviewed by a higher level analyst or by the supervisor for thoroughness and accuracy, soundness of analysis and for application of pertinent guidelines, good reasoning and judgment.

Examples of Duties:

Reviews programs, budget requests, manpower requests, requests for transfer of funds, etc., that have been selected especially to provide training for the incumbent in developing knowledges, skills and techniques in budget and management analysis; gathers additional data from budget and program personnel, as directed; explains well-established policies and procedures to other personnel; conducts research and compiles information, discusses discrepancies and recommendations with the supervisor or higher level analyst.

Knowledge and Abilities Required:

Knowledge of: Working knowledge of the principles, methods and techniques of budget and management analysis; the polices, laws, rules and regulations relating to State budget processes; the organizations and functions of departments of HHSC; fundamentals of report writing; statistical and research methods and techniques; interviewing methods and techniques.

Ability to: Apply the principles, methods and techniques of budget and management analysis work to actual work situations; obtain pertinent factual data; analyze data and make sound recommendations; establish and maintain effective working relationships; speak and write effectively.

BUDGET ANALYST III

2.923

Duties Summary:

Performs moderately difficult budget and management analysis work on a variety of selected procedural and technical assignments, prepares reports on studies conducted with recommendations; and performs other duties as required.

Distinguishing Characteristics:

This is the first level independent worker in the series. Incumbents perform moderately difficult budget and management analysis work assignments which are selective and moderately difficult and complex in nature; pertaining to organizational segments of HHSC departments. Work involves the review and interpretation of programs in preparing budget requests or providing budget analysis services.

Supervision received is of a general nature and assignments are given and explained by a higher level analyst who also reviews finished assignments for completeness,

conformity with current policies and legal requirements and for the application of good judgment. Unusual and/or complex problems are referred to the supervisor or a higher level analyst.

Examples of Duties:

Reviews, evaluates and recommends departmental budgets relative to operations, level of services, etc.; evaluates budget requests, including supplemental appropriations, requests for fund transfers, manpower requests, etc., and recommends appropriate actions; reviews budget requests and supportive data for accuracy, conformance with instructions, appropriateness of methodology, conformance with previous expenditures, legislative decisions; gathers additional data and discusses discrepancies with program personnel and other analysts, complies and consolidates budget requests, and prepares preliminary recommendations; explains budgetary provision to departments; analyzes performance evaluation of departments, programs activities; conducts studies and makes recommendations on departmental organization, procedures, practices, personnel requirements for more efficient operations; confers with departmental officials on budgetary and organizational problems; assists departmental personnel in the implementation of new procedures, polices, systems, etc.; may assist higher level analysts in major project studies; may conduct other related studies as assigned.

Knowledge and Abilities Required:

Knowledge of: In addition to the knowledge and abilities required at the next lower level, good working knowledge of the principles, research techniques and methods; methods and techniques of budget and management analysis work; the policies, laws, rules and regulations relating to HHSC's budget processes; the organization and functions of departments, and research techniques and methods.

Ability to: Exercise judgment, tact and discretion in applying and explaining instructions, policies and procedures; gather and analyze operational, statistical and financial data; apply budget and management analysis principles, policies and procedures; present facts clearly both orally and in writing, maintain effective working relationships.

BUDGET ANALYST IV

2.924

Duties Summary:

Conducts budget and management analysis work and recommends funding levels for programs in HHSC; prepares reports on studies conducted with recommendations; performs budget and management analysis work which regularly encompasses

complex problems; assists in the formulation and execution of the budget for HHSC programs; and performs other duties as required.

Distinguishing Characteristics:

This level independently performs the full range of budget and management analysis work for HHSC and/or its' facility/region which are complex in nature.

Examples of Duties:

Reviews, analyzes and makes recommendation on operating budget requests in relation to goals and objectives; conducts system studies; performs budget analysis work which regularly encompasses complex problems; evaluates and recommends on supplementary appropriation, expenditure schedules, and fund transfers; conducts performance evaluation of departments, programs and activities; reviews and analyzes requests for initiating new programs, new positions, reallocation, new equipment and related budget matters; confers with departmental officials on budgetary directives and policies; conducts studies on departmental organization structure, functions, manpower utilization, space layout, work procedures and practices; and assists in the implementation of budget systems; may conduct general management studies of system-wide impact.

Knowledge and Abilities Required:

Knowledge of: Principles of public administration functions and organization of State government; statistical analysis; basic economics; effective report writing; and the fundamental principles, methods and techniques used in budget analysis. Through working knowledge of the principles, methods and techniques of budget and management analysis work; the polices, laws, rule and regulations relating to HHSC budget processes; the organization and functions of departments as they relate to budget and management analysis; and current and proposed legislation that affect HHSC's budget and budget processes.

Ability to: Gather and analyze operational, statistical and financial data; apply budget and management analysis principles, polices and procedures; present facts clearly both orally and in writing; maintain effective working relationships and apply knowledge of departmental organization and functions as they relate to the budget and management processes.

BUDGET ANALYST V

2.925

Duties Summary:

Performs budget and management analyst work which regularly includes the most complex problems; prepares reports of findings and recommendations; may supervise the work of lower level analysts; and performs other duties as required.

Distinguishing Characteristics:

A position in this class performs the most complex and difficult budget and management analysis work involving conducting research and analysis regarding budgetary related matters to be used as basic resource by HHSC in formulating, presenting and executing HHSC's budget.

Examples of Duties:

Reviews, analyzes and makes recommendations on HHSC's operating budget requests in relation to goals and objectives; recommends establishment, reduction, elimination or current maintenance of services, programs and activities; reviews proposed legislation for impact on departmental programs; attends budget hearings and explains justification for budget recommendations, evaluates and recommends on supplementary appropriation, expenditure schedules, and fund transfers; conducts performance evaluation of departments, programs and activities; reviews and analyzes requests for initiating new programs, new positions, reallocation, new equipment and related budget matters; confers with management on budgetary and management directives and policies; conducts studies on departmental organization structure, functions, manpower utilization, space layout, work procedures and practices; assists in the implementation of budget and management systems; may conduct general management studies of system-wide impact; may supervise work of lower level analysts.

Knowledge and Abilities Required:

Knowledge of: Principles of public administration functions and organization of State government; statistical analysis; basic economics; and effective report writing. Through working knowledge of the principles, methods and techniques of budget and management analysis work; the polices, laws, rule and regulations relating to HHSC budget processes; the organization and functions of departments as they relate to budget and management analysis; and current and proposed legislation that affect HHSC's budget and budget processes.

Ability to: Gather and analyze operational, statistical and financial data; apply budget and management analysis principles, policies and procedures; present facts clearly both orally and in writing; maintain effective working relationships and apply knowledge of departmental organization and functions as they relate to the budget and management processes; organize and coordinate the work of other as assigned.

BUDGET ANALYST VI

2.926

Duties Summary:

Assists in planning and supervising budget and management analysis services; recommends funding levels for HHSC programs, conducts systems studies; serves as team leader; and performs other duties as required.

Distinguishing Characteristics:

Assists in planning and supervising budget analysis and management analysis services for HHSC.

Examples of Duties:

Assists in planning and supervising the review, analysis and evaluation of budgetary and management program needs and problems for HHSC; reviews, analyzes and makes recommendations on capital improvement and operating budget requests and oversees the work of other analysts in this regard; participates in the development of long-range fiscal programs and assures that budget requests are in consonance with stated goals and objectives of HHSC; participates in budget hearings and explains and presents, orally and in writing, justifications for budget recommendations; supervises the review of and/or makes recommendations on work programs, expenditure schedules, supplementary appropriations, fund transfers, requests to create, fill and/or reallocate positions, requests to purchase equipment, and other matters relating to HHSC budget; supervises and conducts analysis of departmental operating and capital improvement programs to ensure that they are properly integrated; supervises and conducts reviews of organizational structure, allocation of functions, manpower utilization, etc.; confers with management and others to explain and advise on budgetary management matters; acts as team leader; and trains and orients new analysts.

Knowledge and Abilities Required:

Knowledge of: Principles of public administration functions and organization of State government; statistical analysis; basic economics; and effective report writing. Through knowledge of the principles, methods and techniques of budget and management

analysis work; the polices, laws, rule and regulations relating to HHSC budget processes; the organization and functions of departments as they relate to budget and management analysis; and current and proposed proposals affecting HHSC programs and polices.

Ability to: Supervise the work of subordinates; analyze, evaluate and render conclusions from available data; prepare clear, concise and comprehensive instructions and reports; maintain effective working relationships; speak effectively before others.

This is the first class specifications for the classes; BUDGET ANALYST I, II, III, IV, V and VI.

DATE APPROVED: July 12, 2006

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