Iowa Department of Administrative Services – Human Resources Enterprise
Classification Series Guidelines

Budget Analyst Series

Classes in the Series

Class Code	Class Title
00721	Budget Analyst 1
00722	Budget Analyst 2
90722	Budget Analyst 2
00723/90723	Budget Analyst 3
90725	Budget Analyst 4
90726	Budget Analyst 5

Series Concept

This series includes non-supervisory positions which perform professional work in the analysis of governmental budgets and related work as the predominate part of their job.

Exclusions

Positions that perform professional accounting, management analysis, and program planning duties as the predominate part of their job should be classified in the appropriate Accountant, Management Analyst, or Program Planner series.

Positions within the Department of Management that are responsible for researching, analyzing, and forecasting the financial impact of agency program changes on state budgets should be classified in the Fiscal & Policy Analyst Series.

Class Distinctions

Budget Analyst 1

Position incumbents in this class function in a trainee capacity as part of an established "trainee/journey" concept. Work is performed under close supervision and is typically characterized by learning assignments. Incumbents spend a minimum of 18 months at this level preparing to be eligible for advancement to the journey level of the series. Incumbents perform entry-level professional work in the analysis of governmental budgets and related work. Incumbents assist higher level budget analysts and departmental officials with budget requests, revisions, special research, and cost projects or studies by applying methods, procedures, principles, theories, and techniques of governmental budget analysis.

Budget Analyst 2 (00722)

This is the experienced/full performance journey-level class in the series and differs from the first level in that work is performed under general supervision and no longer in a training or learning capacity. Position incumbents are promoted to this level from Budget Analyst 1 or have qualifying experience elsewhere that has prepared them for work as a Budget Analyst 2. The incumbents are responsible for providing detailed technical and procedural budget analysis and related work. The incumbents provide consultative budget and analytical services to agency staff regarding budget formulation, program operations, and appropriations control. Incumbents advise and assist with adherence to executive

policies and legislative intent. Incumbents may assist higher-level analysts and/or give guidance and direction to other employees engaged in budget administration. Incumbents review and evaluate requests for operating and capital improvement funds for budget periods and recommend approval, modification or disallowance of such requests.

Budget Analyst 2 (90722)

This class code is used for both trainee-level and journey-level positions exempted from collective bargaining coverage. As such, this class has an extended range that is considered equivalent to the contract-covered Budget Analyst 1 and 2 classes. Position incumbents in this class perform trainee to journey-level professional governmental budget analysis work.

Budget Analyst 3

Position incumbents at this level perform advanced-journey-level budget analysis and related work. Incumbents perform budgetary planning and analysis of operations. Incumbents review agency allotment requests based on authorized budgets and recommend adoption, modification, or disallowance of such requests. Incumbents provide consultative budget and analysis services to agency staff regarding budget formulation, program operations, and appropriations control. Incumbents attend legislative budget hearings and analyze proposed legislation and policy revisions to assess the budgetary impact upon new or existing programs. Incumbents assist in the development of standards and procedures for more efficient budget administration. Additionally, they may serve as lead workers over lower-level budget analysts, and they often provide guidance and direction to others involved in budget control and program activities. Incumbents perform budgetary work for two or more separate operating programs (or a single program of comparable scope and complexity) which represent different fields of work and require different program knowledge and budget techniques. Incumbents at this level usually are involved with budgeting of multiple funds (e.g., several appropriations, reimbursements, revolving funds, etc.).

Budget Analyst 4

Positions in this class function as a lead budget analyst within a cabinet-level agency with extensive operating programs or for one or more agencies outside the employing agency. They are the primary representative of the agency in budgeting and fiscal reporting and are responsible for the coordination and consolidation of budget analyses for the broad functional area(s) (e.g., operations, grants, or a wide-ranging category of programs) to which they are assigned. This would typically include leading the work of Budget Analyst 3s.

Positions at this level may also serve as the CFO/liaison and establish rate/fee structure for "entrepreneurial" organizations. In this capacity, they work closely with the director/deputy director of the employing agency, or to the director/deputy director of one or more other agencies.

Incumbents work under minimal guidance to ensure consistency across related budgets and key assumptions are aligned in the provision of consultative budget and analysis services to agency staff regarding budget formulation, program operations, calculation of rates, and appropriations control. Incumbents attend legislative budget hearings and analyze proposed legislation and policy revisions to assess the budgetary impact upon new or existing programs. Incumbents develop standards and procedures for more efficient budget administration. Incumbents at this level make significant budget decisions with little to no review by a supervisor.

Budget Analyst 5

Positions in this class function as a senior budget analyst within a cabinet-level agency, and are in charge of budgets and financial processes that impact all areas of the agency. The scope of work at this level requires a detailed understanding of funding streams and reporting requirements across the entire agency, not just for an assigned program or broad functional area. Work at this level is highly visible throughout the organization, and employees at this level interact with all levels of leadership throughout the department. They are involved in directing the work of Budget Analyst 3s and 4s as well as others to resolve issues and accomplish comprehensive financial goals. They develop and maintain cost allocation plans and rate methodologies, which apply to a large number and variety of funding sources.

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