

**IOWA DEPARTMENT OF ADMINISTRATIVE SERVICES ▼**  
**HUMAN RESOURCES ENTERPRISE**  
**FISCAL & POLICY ANALYST**

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**DEFINITION**

Performs trainee to journey level work in the application of the methods, procedures, principles, theories, and techniques used in financial analysis, economic analysis, planning, and program evaluation management analysis, and budgeting; performs related work as required.

**The Work Examples and Competencies listed are for illustrative purposes only and not intended to be the primary basis for position classification decisions.**

**WORK EXAMPLES**

Provides financial analysis, program evaluation and management analysis relating to budget formulation, program operations, control of appropriations, statewide accounting and payroll operations, and development of the statewide comprehensive annual financial report.

Conducts planning, budget and management studies to recommend alternative courses of action based upon reports, grant requests, budget requests and conferences with effected state or local officials.

Advises and assists assigned department(s) local entities to ensure adherence to executive policies and legislative intent.

Reviews and evaluates requests for operating and capital program funds or allotment requests to recommend approval, modification, or disallowance of the agency's or local entities request.

Reviews tax credit claim data to ensure lowans pay all taxes required by law, but no more.

Forecasts sales and use collections by jurisdiction to provide guidance for the distribution of local option sales taxes to local governments.

Produces tax statistics for evaluation studies on tax expenditures to inform the Legislature and Governor about the efficacy of programs and incentives.

Estimates the fiscal impact of existing tax expenditures.

Analyzes proposed legislation and policy revisions or prepares revenue estimates, statistical reports, and fiscal notes to assess impact and effect; recommends support modification or withdrawal based upon the Governor's adopted program plans and financial policies.

Conducts and/or participates in studies and surveys of departmental methods and procedures; prepares comprehensive reports of such activity including recommendations for indicated action.

Participates in legislative hearings to explain general or specific aspects of budget and legislative proposals and assure that the Governor's policies are made known to concerned parties.

Communicates with department or local entity heads and fiscal officers to gather current information about the organization's activities and problems.

**COMPETENCIES REQUIRED**

Knowledge of contemporary principles, techniques and methods of management analysis, administration, financial analysis, and program evaluation.

Knowledge of State or local budget and accounting policies and procedures.

Knowledge of the state and federal tax code.

Knowledge of the operating programs, functions and objectives of the departments(s) or local entities for which services are rendered.

Knowledge of electronic data processing applications related to the state's financial reporting systems.

Knowledge of the State legislative system particularly as it applies to the budgetary process.

Ability to interact with department representatives, legislators, local government representatives, the public, and other office staff.

Ability to read, understand and interpret the Code of Iowa, legislative bills and actions.

Ability to prepare, evaluate and explain diverse financial data.

Ability to prepare, evaluate and explain tax statistics.

Ability to read, understand and interpret the Code of Iowa legislative bills and actions.

Experience using statistical software packages such as SAS.

Displays high standards of ethical conduct. Refrains from dishonest behavior.

Works and communicates with all clients and customers providing quality professional service.

Displays a high level of initiative, effort, attention to detail and commitment by completing assignments efficiently with minimal supervision.

Follows policy and cooperates with supervisors and aligns behavior with the goals of the organization.

Fosters and facilitates cooperation, pride, trust, and group identity and team spirit throughout the organization.

Exchanges information with individuals or groups effectively by listening and responding appropriately.

**EDUCATION, EXPERIENCE, AND SPECIAL REQUIREMENTS**

Experience equal to six years of full-time professional level budget analysis, economic analysis, financial management, accounting, or management analysis work;

OR

an equivalent combination of education and experience, substituting thirty semester hours of accredited post high school education for each year of the required experience to a maximum substitution of four years;

OR

a Bachelor's Degree in Business Administration, Public Administration, Economics, Finance or Accounting and one year of the required experience.

OR

a Master's Degree or higher in Business Administration, Public Administration, Law, Economics, Finance or Accounting.

Effective Date: 11/12 BR