



## EXECUTIVE BUDGET AND POLICY ANALYST

---

### **General Summary**

Executive Budget and Policy Analysts perform a range of independent analytic duties within the Department of Finance and Administration (DFA) State Budget Division (SBD) to develop analyses, recommendations and reports for SBD management and to provide testimony to legislative committees on state agency budgets, policies and performance goals.

### **Executive Budget and Policy Analyst**

**Jobcode: C9001**

**Pay Band: 65**

**FLSA Status: Exempt**

### ***Distinguishing Characteristics***

This is the entry level DFA Executive Budget & Policy Analyst position and is characterized by management of an assigned agency caseload of less complexity (funding, policies, issues) and membership on a team who share policy and budget responsibilities across several agencies. Performs duties under direction of a team lead, Division and Deputy Director.

### ***Recommended Education and Experience for Full Performance***

Bachelor's degree in any field of study from an accredited university and three (3) years of experience performing budget projections, financial document preparation and management or policy/program analysis.

### ***Minimum Qualifications***

Bachelor's degree in any field of study from an accredited university and one (1) year of experience performing budget projections, financial document preparation and management or policy/program analysis. Any combination of education from an accredited college or university in a related field and/or direct experience performing budget projections, financial document preparation and management or policy/program analysis totaling five (5) years may substitute for the required education and experience.

### ***Essential Duties and Responsibilities\****

- Conducts budget analysis for assigned agencies. Monitors revenues and expenditures. Provides report of same for review and approval by team lead.
- Reviews and analyzes agencies' budget adjustment requests, budget projections and personnel transactions for compliance with the State Budget Act, the Financial Control Act, the Accountability in Government Act and other statutes for accuracy and fiscal integrity for review and approval by team lead
- Develops Executive budget and policy recommendations for assigned agency caseload.. Presents these recommendations to SBD management, DFA Cabinet Secretary and the Governor's Office.
- Provides testimony for Executive budget recommendations throughout legislative process.
- Assists in conducting trainings on appropriation request, operating budget and performance measure trainings on an annual basis to state agencies.
- Monitors and ensures the accurate implementation of annual operations budgets for assigned state appropriated agencies.
- Assists agencies through the development and implementation of request and budget cycles.
- Prepares Financial Impact Reports for all assigned legislation during the legislative sessions.
- Develops and maintains oversight of state agencies' annual performance measures to ensure compliance with Accounting in Government Act, including establishing targets.
- Develops veto options/recommendations for Governor.

- Develops policy recommendations on all assigned legislation and for all assigned agencies. Policy recommendations may also pertain to policy proposals developed by assigned agencies or through other venues. These recommendations must be reviewed and approved by team lead and then are presented to SBD management, DFA Cabinet Secretary and the Governor's Office.

## **Senior Executive Budget and Policy Analyst**

**Jobcode: C9002**

**Pay Band: 75**

**FLSA Status: Exempt**

### ***Distinguishing Characteristics***

This is a full performance Executive Budget and Policy Analyst position and is characterized by independent management of an assigned agency caseload of substantial complexity (funding, programs, policies, issues) and membership on a team who share policy and budget responsibilities across several agencies.

### ***Recommended Education and Experience for Full Performance***

Bachelor's degree in any field of study from an accredited university and four (4) years of experience performing budget and/or policy analysis in the DFA State Budget Division and/or legislative fiscal or policy analysis.

### ***Minimum Qualifications***

Bachelor's degree in any field of study from an accredited university and two (2) years of experience performing budget and/or policy analysis in the DFA State Budget Division and/or legislative fiscal or policy analysis. Any combination of education from an accredited college or university in a related field and/or direct experience performing budget and/or policy analysis in the DFA State Budget Division and/or legislative fiscal or policy analysis totaling six (6) years may substitute for the required education and experience.

### ***Essential Duties and Responsibilities\****

- Develops Executive budget and policy recommendations for assigned agencies through the use or development of monitoring strategies. Presents these recommendations to SBD management, DFA Cabinet Secretary and the Governor's Office.
- Reviews and analyzes agencies' budget adjustment requests, budget projections and personnel transactions for compliance with the State Budget Act, the Financial Control Act, the Accountability in Government Act and other statutes for accuracy and fiscal integrity.
- Provides testimony for Executive budget recommendation throughout legislative process.
- Develops veto options/recommendations for the Governor.
- Conducts trainings on appropriation request, operating budget and performance measure trainings on an annual basis for state agencies.
- Directs agencies through the development and implementation of request and budget cycles.
- Monitors and ensures the accurate implementation of annual operations budgets for assigned state appropriated agencies.
- Serves on legislative sub-committees and participates in high-level negotiations with legislative and agency staff.
- Prepares Financial Impact Reports.
- Develops and maintains oversight of state agencies' annual performance measures to ensure compliance with Accounting in Government Act, including establishing targets.

- Provides specific one-on-one training with agency Chief Financial Officers, Administrative Service Directors and other financial staff concerning state budget operations and technical support for the state financial software system.
- Develops policy recommendations on all assigned legislation and for all assigned agencies. Policy recommendations may also pertain to policy proposals developed by assigned agencies or through other venues. These recommendations are presented to SBD management, DFA Cabinet Secretary and the Governor's Office.

### **Principal Executive Budget and Policy Analyst**

**Jobcode: C9003**

**Pay Band: 85**

**FLSA Status: Exempt**

#### ***Distinguishing Characteristics***

This level is distinguished from the Analyst role in that the Principal Analyst serves as a team lead, coordinating analysis, initiatives, collaboration and recommendations across multiple agencies with policy and budget commonalities but who are under the day-to-day caseload assignments of other DFA SBD Analysts. Incumbents at the Principal level staff the most complex agencies or most complex funding operations in state government. The Principal Analyst serves as a technical lead and mentor to Analysts in this series.

#### ***Recommended Education and Experience for Full Performance***

Bachelor's degree in any field of study from an accredited university and seven (7) years of combined experience performing budget analysis in the DFA State Budget Division and performing budget analysis or financial management duties and/or legislative fiscal or policy analysis. Master's degree preferred.

#### ***Minimum Qualifications***

Bachelor's degree in any field of study from an accredited university and five (5) years of combined experience performing budget analysis in the DFA State Budget Division and performing budget analysis or financial management duties and/or legislative fiscal or policy analysis. Master's degree preferred. Any combination of education from an accredited college or university in a related field and/or direct experience performing budget analysis in the DFA State Budget Division and performing budget analysis or financial management duties and/or legislative fiscal or policy analysis totaling nine (9) years may substitute for the required education and experience.

#### ***Essential Duties and Responsibilities\****

- Performs all duties of the SBD Senior Executive Budget and Policy Analyst.
- Staffs the largest agencies and/or most complex financial operations in state government.
- Leads a team of Analysts in coordinating policy and budget work of common interest across multiple agencies, including areas such as education, infrastructure, natural resources, and taxation.
- Leads team in preparing the most complex and multivariate analyses and recommendations for DFA management and Governor's office staff.
- Leads training and briefing sessions for agencies, Governor's office staff, and DFA management.
- Develops policy recommendations on all assigned legislation and for all assigned agencies. Policy recommendations may also pertain to policy proposals developed by assigned agencies or through other venues. These recommendations are presented to SBD management, DFA Cabinet Secretary and the Governor's Office.

---

**Bargaining Unit:**

**Statutory Requirements:** N/A

**Conditions of Employment:** Working Conditions for individual positions in this classification will vary based on each agency's utilization, essential functions and the recruitment needs at the time a vacancy is posted. All requirements are subject to possible modification to reasonably accommodate individuals with disabilities.

**Working Conditions:** Work is performed in an office setting. Frequent late hours, weekends, on-call and callback work may be required related to the annual legislative session. Travel may be required. Incumbent will frequently work under time constraints and is expected to maintain the highest level of professional conduct, ethics and confidentiality.

**Established:** 10/23/2015

**Revised:**

---

*\*Essential Duties and Responsibilities are intended to be cumulative for each progressively higher level of work. The omission of specific statements does not preclude management from assigning other duties which are reasonably within the scope of duties. Classification description subject to change. Please refer to SPO website ([www.spo.state.nm.us](http://www.spo.state.nm.us)) to ensure this represents the most current copy of the position.*