

## BUDGET ANALYST COMPETENCY PROFILE

### Description of Work:

The Budget Analyst provides leadership, oversight, and support in the execution of the budget to agency head and/or division management. Analysts examine budgets and expenditures for compliance with applicable state budget rules, legislative intent as well as federal and state laws. Positions provide consultation, technical assistance and coordination in the preparation and execution of the continuation, operating and expansion budgets which may utilize multiple funding sources. Analysts complete or evaluate methodologies used in the preparation of budget or program spending forecasts and provide technical assistance to improve the accuracy of projections. Analysts evaluate program, policy and rule changes to determine their fiscal and program impact and to assure compliance with federal and state requirements. Analysts are responsible for the coordination and evaluation of legislatively required reports to ensure that they meet statutory and legislative requirements. Analysts may review and approve contract recommendations to assure that contracts are consistent with state, federal and agency guidelines. Analysts identify risk and adverse issues generated in budget and program activities and present appropriate issues and recommend solutions to management. Professional technical knowledge and analytical skills are utilized to assure that agency program goals and outcomes are effectively supported.

<b>ROLE DESCRIPTIONS BY COMPETENCY LEVEL</b>		
<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
Analyst assists in the review of program budgets and expenditures. They regularly monitor the budget throughout the year and conduct analysis on discrepancies between estimated and real spending, adherence to budgetary rules and regulations and accuracy in accounting and calculation. They demonstrate knowledge of review and submission of budget revisions	Analyst reviews program budgets and expenditures and approves budget revisions for accuracy and program efficiency. Staff regularly monitor budgets throughout the year and conduct analyses of spending patterns to identify potential strengths and weaknesses. Positions independently troubleshoot errors and inconsistencies within the budget and provide recommendations to management for	Analyst has key responsibility for the most complex budget or program issues. Analyst regularly serves as the lead in the design and coordination of advanced level agency-wide projects. Analyst reviews and interprets proposed rule changes for fiscal impact and legislative reports for submission to the General Assembly. Analyst possesses superior analytical and problem solving skills and demonstrates the ability to apply these

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<p>and are familiar with or can learn to use the budget systems. Position conducts analysis of ongoing spending patterns for program budgets and identifies potential areas of concern. Position assists in the provision of technical assistance and guidance to agency staff relative to state budget rules and laws.</p>	<p>program improvements. Analyst reviews and assists in developing methodologies used in the preparation of spending forecasts or budget projections and provides technical assistance. Analysts at this level are highly knowledgeable of all current and applicable state budget rules, federal and state laws. Journey level analysts review and interpret laws for legislative intent and are able to both determine and communicate their impact. Analysts identify risk and adverse issues generated in budget and program activities and present appropriate issues and recommend solutions. Analyst may review and approve contracts. They serve as liaison to the Office of State Budget Management</p>	<p>attributes in the execution of solutions. Analyst has extensive knowledge of the North Carolina budget and administrative structures and the ability to evaluate the best methods for accomplishing agency goals. Analyst has acquired and demonstrated expertise in all diverse areas of the Budget Analyst role.</p>
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Note: Competency statements are progressive and not all competencies apply to every position/employee. Evaluate only those that apply. For positions with some supervision consider the highest level of professional work performed.

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<b>Competency</b>	<b>Definition</b>
<b>Analytical Thinking</b>	Ability to retrieve, organize and interpret data, assess situations, and provide recommendations
<b>Communication</b>	Ability to present information to individuals or groups; ability to deliver presentations suited to the characteristics and needs of the audience. Ability to convey information clearly and concisely to groups or individuals either verbally or in writing to ensure that they understand the information and the message. Ability to listen and respond appropriately to others
<b>Consulting/Advising</b>	Ability to provide advice and counsel. Ability to understand client programs, organization and culture.
<b>Client/Customer Service</b>	Ability to develop and maintain strong relationships with clients or customers by listening to the client/customer and understanding and responding to identified needs
<b>Decision Making</b>	Knowledge of and ability to use effective approaches for choosing a course of action or developing appropriate solutions and/or reaching conclusions. Ability to take action consistent with available facts, constraints, and anticipated outcomes
<b>Negotiation</b>	Ability to confer with others to reach resolution. Ability to explore alternatives and positions to reach outcomes that gain the support and acceptance of all parties
<b>Organizational Sensitivity</b>	Ability to understand the organization's mission, the function of the specific work unit and how it interrelates with other work units to serve the customer/client. Ability to understand the impact and implications of decisions on the community and other departments.

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<b>Problem Solving</b>	Ability to identify problems, determine possible solutions, and actively work to resolve the issues
<b>Professional Knowledge</b>	Possession of a designated level of professional skill and/or knowledge in specific area(s) and to keep current with developments and trends in area(s) of expertise, usually acquired through post-secondary education

**Analytical Thinking** - Ability to retrieve, organize and interpret data, assess situations, and provide recommendations.

<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p>Identifies, understands and determines the significance of issues, causes, problems, and opportunities.</p> <p>Utilizes available resources to correctly determine the issues and problems.</p> <p>Implements standard course(s) of action to resolve issues within established timeframes and administrative and technical requirements.</p> <p>Involves supervisor as necessary when dealing with issues to determine the most appropriate course of action</p>	<p>Analyzes issues and problems and proposes solutions which are consistent with the agency's priorities and financial resources.</p> <p>Uses tools to identify meaningful patterns or relationships and draws conclusions about the meaning of the data.</p> <p>Asks clarifying questions and probes for relevant information.</p> <p>Identifies cause and effect of problems; looks at underlying problems for solution.</p> <p>Collects, relates, associates or compares data to identify options/alternatives.</p> <p>Approaches a complex task or problem</p>	<p>Identifies the impact of events or decisions on stakeholders/customers.</p> <p>Weighs and prioritizes the costs, benefits, risks or chances for success.</p> <p>Identifies parameters, limitations, or boundaries that impact programs.</p> <p>Measures outcome of problem resolution and takes further action as needed.</p>

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	by breaking it down into its component parts and considers each part in detail.	
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**Communication**

Ability to present information to individuals or groups; ability to deliver presentations suited to the characteristics and needs of the audience. Ability to convey information clearly and concisely to groups or individuals either verbally or in writing to ensure that they understand the information and the message. Ability to listen and respond appropriately to others

<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p>States information in a clear and concise manner, in both written and oral form.</p> <p>Communicates the information to the appropriate staff in a timely manner.</p> <p>Uses correct grammar, punctuation, and spelling.</p> <p>Listens for content and understanding.</p>	<p>Clarifies the purpose and importance of the information.</p> <p>Explains the information in understandable terms for non-technical staff.</p> <p>Ensures that major points follow a logical sequence.</p> <p>Seeks input, listens and checks for mutual understanding; asks for clarification as needed.</p> <p>Presents information considering the impact of the information on procedures, policies, organizational objectives, and the agency.</p> <p>Advises and consults with others to ensure accuracy and appropriateness of communications.</p>	<p>Structures information in keeping with listener's experience, background, and expectations. Uses terms, examples, and analogies that are meaningful to the listener.</p> <p>Uses an effective and approachable style that engages others and builds credibility.</p> <p>Provides rationale when delivering complex or challenging information.</p> <p>Selects most appropriate medium when conveying information and reinforcing message.</p> <p>Assesses and weighs the impact of the information on the agency including legal/regulatory implications.</p>

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**Consulting/Advising** – Ability to provide advice and counsel. Ability to understand client programs, organization and culture.

<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p>Listens to customers to identify needs or problems.</p> <p>Conveys customer needs to others involved.</p> <p>Offers suggestions to resolve problems or issues.</p> <p>Presents appropriate issues to internal management</p>	<p>Determines customer expectations.</p> <p>Determines who should be involved in project or solution.</p> <p>Works together with customer to discuss alternative solutions.</p> <p>Works with customer to resolve issues by applying expert knowledge.</p> <p>Conducts research as needed to assist customer in problem resolution.</p> <p>Identifies and uses relevant tools to collect and analyze data.</p> <p>Shares results of research or expertise to gain agreement on next steps.</p> <p>Builds support for planned outcome.</p> <p>Provides guidance to customer during implementation of program, project or service.</p> <p>Conducts evaluation of program, project or service to determine if customer needs were met.</p>	<p>Regularly provides expertise and counsel to internal/external customers (e.g. Divisions, department management, others.)</p> <p>Interprets and synthesizes data based on broad understanding of organizational impact and professional expertise.</p> <p>Understands relationships and dynamics of program areas as they impact service delivery or project.</p> <p>Projects or forecasts trends or outcomes from review of data, knowledge of field and organizational systems impact.</p> <p>Advises senior level management on an on-going basis to develop long-range strategic goals and alternatives</p>

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**Client/Customer Service** - Ability to develop and maintain strong relationships with clients or customers by listening to the client/customer and understanding and responding to identified needs.

<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p>Can identify both internal and external customers.</p> <p>Responds to customer needs within established parameters.</p> <p>Accessible to the customer and provides prompt, attentive service.</p> <p>Listens carefully and checks for understanding of customer needs.</p> <p>Demonstrates courteous actions and follows the organization's established protocol for customer service.</p>	<p>Anticipates, identifies and understands customer's service needs.</p> <p>Identifies options, develops solutions and takes action when responding to customer needs.</p> <p>Keeps customers informed of progress and remains accessible when balancing multiple priorities.</p> <p>Assesses or checks with customer to ensure solution meets needs.</p> <p>Develops relationships/partnerships with internal/external customers.</p>	<p>Identifies trends that impact service delivery to groups or individual customers.</p> <p>Develops plans to improve service delivery based on customer feedback.</p> <p>Looks for ways to remove barriers to optimize service delivery.</p> <p>Proactively seeks to determine customer needs.</p> <p>Identify ways to streamline processes/procedures and link resources for efficient and effective customer service.</p> <p>Develops creative solutions to respond to service needs.</p>

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**Decision Making**

Knowledge of and ability to use effective approaches for choosing a course of action or developing appropriate solutions and/or reaching conclusions. Ability to take action consistent with available facts, constraints, and anticipated outcomes

<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p>Makes determinations by following specific guidelines, standard operating procedures, laws, rules, and/or regulations.</p> <p>Consults supervisor as necessary prior to making determinations or conclusions.</p> <p>Commits to action and implements decisions within agreed/reasonable time.</p>	<p>Recognize issues, problems or opportunities and determines what action is needed.</p> <p>Gathers available information and selects option best suited to situation.</p> <p>Makes determinations by interpreting and/or incorporating federal/state laws and regulations and APA rules that impact programs/activities, local government, or the public.</p> <p>Consults with management if decisions have organizational and/or public impact.</p> <p>Considers impact on productivity and service delivery.</p> <p>Considers short and long term impact of decisions.</p>	<p>Makes independent decisions without supervisory input, by interpreting and incorporating federal/state laws and regulations and APA rules that impact programs/activities, local government, or the public.</p> <p>Recommends changes to federal/state laws and regulations and APA rules that impact programs/activities, local government, or the public.</p> <p>Evaluates past decisions to prevent reoccurrence of problems.</p> <p>Interprets trends and uses data to improve decisions</p>

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**Negotiation**

Ability to confer with others to reach resolution. Ability to explore alternatives and positions to reach outcomes that gain the support and acceptance of all parties.

<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p>Clarifies the current situation, shares information openly, and identifies issues and concerns of appropriate parties.</p> <p>Identifies points of agreement/disagreement and considers the needs and viewpoints of appropriate parties</p>	<p>Works to keep the discussion focused on key issues.</p> <p>Handles differing points of view in a positive way.</p> <p>Examines relevant viewpoints and explores alternative approaches. Reviews pros and cons.</p> <p>Considers all parties needs, concerns and initial positions.</p> <p>Evaluates options or solutions openly, fairly and engages in mutual problem solving.</p> <p>Facilitates agreement through a give and take process that considers each party's needs.</p>	<p>Challenges participants to reach consensus.</p> <p>Builds support for negotiated solution.</p> <p>Responds to objections by emphasizing value of preferred alternative; exposes problems of undesirable alternatives.</p> <p>Provides follow-up to involved parties to ensure solution meets needs</p>

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**Organizational Sensitivity**

Ability to understand the organization's mission, the function of the specific work unit and how it interrelates with other work units to serve the customer/client. Ability to understand the impact and implications of decisions on the community and other departments

<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p>Understands duties and purpose of his/her position.</p> <p>Recognizes how work units interrelate.</p> <p>Understands how primary duties/purpose of the position contributes to accomplishing the goals of the work unit.</p> <p>Recognizes the customer and understands his/her role in meeting their needs</p>	<p>Understands the primary duties/purpose of the work unit and how the unit contributes to accomplishing the goals of the organization.</p> <p>Understands how individual decisions impact the achievement of the organization's goals.</p> <p>Considers how one's actions affect the public view of the organization.</p> <p>Considers how one's interactions with customers reflect the organization's goals.</p>	<p>Considers the impact of recommendations, outcomes, and organizational changes on the public.</p> <p>Communicates goals, mission and priorities of the organization when interacting with organizational stakeholders.</p> <p>Identifies various customers' changing needs and adapts organizational service delivery system accordingly.</p>

**Problem Solving**

Ability to identify problems, determine possible solutions, and actively work to resolve the issues

<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p>Identifies and acknowledges basic components of delivery systems.</p> <p>Seeks resolution to problems.</p>	<p>Identifies problems that require in-depth analysis.</p> <p>Gathers and analyzes/interprets information to better understand</p>	<p>Anticipates and proactively pursues issues or problems.</p> <p>Recognizes inherent problems and issues caused by ineffective and/or</p>

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<p>Implements standard course(s) of action to resolve a problem within established timeframes and administrative and technical requirements.</p> <p>Involves supervisor as necessary when dealing with issues to determine most appropriate course of action.</p>	<p>problems.</p> <p>Creates relevant options for solving problems.</p> <p>Chooses appropriate action by considering implications and consequences.</p> <p>Seeks input from stakeholders (e.g., subordinates, peers, management, customers.)</p> <p>Checks outcome of problem resolution.</p>	<p>overlooked policies, procedures, rules, regulations, and laws.</p> <p>Detects trends, associations, and cause-effect relationships.</p> <p>Includes key policy makers and other stakeholders in the decision-making process to ensure buy-in and understanding of issues, problems, and resolutions.</p> <p>Measures outcome of problem resolution and takes further action as needed.</p>
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**Professional Knowledge**

Possession of a designated level of professional skill and/or knowledge in specific area(s) and to keep current with developments and trends in area(s) of expertise, usually acquired through post-secondary education

<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p>Performs a limited variety of recurring and related tasks/functions using steps/processes/applications that are readily understood.</p> <p>Provides assistance to others by troubleshooting simple technical problems.</p> <p>Takes requests from others to solve problems of limited complexity.</p> <p>Maintains required educational level</p>	<p>Applies and interprets professional knowledge to complete tasks.</p> <p>Performs a variety of tasks/functions that involves related or varying processes.</p> <p>Analyzes and determines various courses of actions and appropriate services.</p> <p>Solves a variety of problems that require the examination of data and</p>	<p>Applies and interprets technical /professional/ regulatory knowledge to resolve unique or highly complex situations.</p> <p>Performs a large number of widely varying and functionally diverse assignments that requires in-depth analysis and problem solving.</p> <p>Develops work concepts, policies, and procedures using broad</p>

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<p>and experience criteria.</p>	<p>processes to determine the best course(s) of action.</p>	<p>guidelines, methods, and procedures. Serves as a “technical expert”; guides, directs and coaches others regarding application and interpretation of complex issues. Has a thorough and extensive understanding of programs, concepts, and practices within assigned division(s) as well as a general understanding of other departmental programs.</p>
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**Recommended Minimum Training Guideline:** Graduation from a four year college or university in the fields of public administration, business administration, accounting, or a related programmatic field; or an equivalent combination of education and experience.

**Special Note:** This is a generalized representation of positions in this class and is not intended to identify essential work functions per ADA. Examples of competencies are primarily those of the majority of positions in this class, but may not be applicable to all positions