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Class Specifications
for the Class:

PROGRAM & BUDGET POLICY OFFICER
(PROGRAM & BUDGET POLICY OFFCR)

Duties Summary:

Plans, directs and conducts various studies relating to the impact of statewide budget policies on various state programs, and is responsible for the development of statewide policies and procedures pertaining to program planning, budgeting and evaluation activities; provides staff advice and technical assistance on budgetary matters; and performs other related duties as assigned.

Distinguishing Characteristics:

This class reflects responsibility for the staff office, located in the Budget, Planning and Management (BPM) Division of the central budget agency, charged with providing technical staff services in planning, developing coordinating statewide policies and activities which pertain to fiscal management, program planning, budgeting and evaluation; and providing advice and technical assistance on budget policy matters. Activities of the office include reviewing the statewide budget for conformance with established policies and procedures, laws, rules and regulations, and the State financial plan objectives; providing advice, assistance and staff services to the division chief, branch chiefs, program administrators of other agencies, the Governor, and other personnel on policy matters pertaining to the interpretation, preparation, implementation and administration of State budget, planning, and management functions and practices; conducting studies on the impact of various economic factors (e.g., federal and State economic policies, economic trends locally, nationally and internationally) on State fiscal and budget policies and the financial condition of the State.

In addition, this class serves as chief staff advisor on matters relating to budgetary policy. Top-level technical advice and assistance is provided to the BPM Division chief, the Director of Budget & Finance, the Governor of Hawaii, and others. Such responsibility involves providing technical advisory opinions relating to the legal, social and political ramifications of proposed budget actions on the State's financial condition and existing fiscal and budget policies; interpreting and monitoring various policies and procedures for conformance with laws, rules and regulations as they relate to fiscal and budget management; reviewing and analyzing applicable statutes, legislation and constitutional provisions to ascertain fiscal and programmatic impact on statewide program planning and budget policies; providing staff analysis and recommendations to the Office of the

Governor on matters pertaining to federal economic policies, rules and regulations, federal budget proposals and congressional proceedings, and other matters having potential impact on State fiscal management policies.

A position in this class works under the general supervision of the Budget, Planning and Management Division chief, and supervises the work of subordinate analysts performing technical staff support work.

Examples of Duties:

Plans, directs, conducts and coordinates the development of statewide policies and procedures pertaining to program planning, management and budgeting activities; advises the division chief on critical matters, as well as matters of specific interest; plans, develops and recommends statewide operating and administrative control procedures within the broad framework of changing legal, administrative and agency requirements and standards; advises the division chief and other agency personnel on the underlying concepts and principles of fund sources (e.g., special funds, revolving funds, general obligation bond funds, revenue bond funds, trust and agency funds, and federal funds); advises and assists other agency staff on policies, guidelines, procedures and laws pertaining to specific and general appropriation act funds and provisions, and other matters relating to the application of statewide budget and fiscal policies; advises the division chief on the State financial condition and State financial plan within which the executive budget should be formulated, as well as the potential impact of federal actions on the State's financial condition; develops original procedures, guidelines and policies for the preparation of the executive budget and for the implementation of various appropriation authorizations; coordinates and monitors the administration of statewide budget execution policies and budget preparation instructions; plans and conducts meetings with BPM branch chiefs and other personnel on budgetary matters; advises the division chief on a variety of evolving activities, conditions, and legal developments in State government which pertain to budgeting, program planning, and fiscal management, and recommends approaches and solutions to problems in such areas; develops and recommends statewide policies of administrative control over program adjustments (e.g., fund transfers, accounting procedures, expenditure controls, staffing levels, etc.); interprets and monitors for compliance with laws, rules, regulations, policies and procedures, various statewide matters including accounting, budgeting, personnel and State planning policies, as they relate to fiscal and budget management; initiates independent review and analysis of applicable statutes, legislation and constitutional provisions for the division to ascertain statewide fiscal and programmatic impact and legislative and constitutional intent with regard to statewide program planning and budget policies; determines consistency of division actions and recommendations with applicable statutory and constitutional tenets, and recommends amendments/revisions as necessary; monitors, analyzes and assesses federal budget and tax policies, proposals

and legislation to ascertain economic and fiscal impact on the State; conducts program evaluation; prepares and issues special instructions and directives for non-routine, complex statewide procedures; provides departmental testimony for legislative hearings on matters pertaining to the administration's fiscal, budgetary and program management policies; provides testimony and press releases for the director and administration on financial condition of the State, the biennium and supplemental budget recommendations; drafts legislation pertaining to budgetary policies and fiscal management; provides staff analysis and recommendations to the Office of the Governor on matters pertaining to federal economic policies, rules and regulations, federal budget proposals and congressional proceedings, and other matters having potential impact on State fiscal management policies; plans, assigns and reviews the work of subordinate analysts; as directed by the division chief, develops and prepares program and financial analyses, short- and long-range planning data, short- and long-range planning policies; interviews candidates for vacant positions of the branches of the division and recommends selection; develops plans for orientation and training of division employees; prepares special reports for collective bargaining negotiations.

Knowledge, Skills and Abilities Required:

Knowledge of: Principles of public administration; functions and organization of State government; report writing; cost/benefit analytical techniques; statistics; economics including price theory and theory of the firm; the State's program structure and related administrative policies and procedures; principles, methods and techniques of budget and program evaluation analysis work; the organization and functions of departments as they relate to budget and program evaluation analysis; federal and State statutes as they relate to budget administration; policies, procedures, rules and regulations, relating to State budget and program evaluation processes; comprehensive knowledge of the operations of the State's entire budget process; legislative processes; governmental finance administration and budgeting; research methods and techniques; economic analysis.

Ability to: Supervise the conduct of comprehensive program studies; deal effectively with program managers, legislative groups and others; plan, assign and review the work of others; analyze, evaluate and draw sound conclusions from available data; prepare clear, concise and comprehensive instructions and reports; communicate effectively orally and in writing; interpret and analyze the intent of laws relating to budget; determine impact of various economic factors on fiscal and budget policies, and financial condition of the State.

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This is the first class specification for the new class PROGRAM & BUDGET POLICY OFFICER (PROGRAM & BUDGET POLICY OFFCR).

Effective Date: September 1, 1986

DATE APPROVED: July 2, 1987

/s/ Alfred C. Lardizabal
ALFRED C. LARDIZABAL
Director of Personnel Services