

**State of Michigan
Civil Service Commission**
Capitol Commons Center, P.O. Box 30002
Lansing, MI 48909

Position Code

1. FINCALTE

POSITION DESCRIPTION

This position description serves as the official classification document of record for this position. Please complete the information as accurately as you can as the position description is used to determine the proper classification of the position.

2. Employee's Name (Last, First, M.I.)	8. Department/Agency DEPT OF INS AND FIN SERVICE
3. Employee Identification Number	9. Bureau (Institution, Board, or Commission)
4. Civil Service Position Code Description Financial Analyst-E	10. Division Office of Financial and Administrative Services (OFAS)
5. Working Title (What the agency calls the position) Budget Analyst	11. Section Accounting, Budget, and Facility Services
6. Name and Position Code Description of Direct Supervisor BRININSTOOL, TRAVIS L; STATE ADMINISTRATIVE MANAGER-1	12. Unit
7. Name and Position Code Description of Second Level Supervisor RAMOS, MEGAN A; SENIOR POLICY EXECUTIVE	13. Work Location (City and Address)/Hours of Work 530 Allegan St., Lansing, MI. 48933 / Monday-Friday; 8:00 a.m.-5:00 p.m.

14. General Summary of Function/Purpose of Position

This position is responsible for the budget and financial activities related to the Offices of the Director, Banking, Communications, Consumer Finance, and Credit Unions and each office's associated programs. This position works with budget development, budget tracking, budget monitoring, monthly revenue and expenditure reporting, analyzing and reconciling, fee assessment review and recommendations, interpreting existing legislation, policies, rules, and procedure and tracking new legislation for fiscal and policy impacts. The position will also interact with SIGMA, including running, researching, and reconciling reports related to budget and financial activities.

15. Please describe the assigned duties, percent of time spent performing each duty, and what is done to complete each duty.
List the duties from most important to least important. The total percentage of all duties performed must equal 100 percent.

Duty 1

General Summary:

Percentage: 50

Research, analyze, evaluate, and reconcile all financial data including revenue, expenditure and fee assessment review and recommendations for the designated offices and their associated programs.

Individual tasks related to the duty:

- To determine financial impact, analyze and evaluate monthly office expenditure reports for designated offices, to ensure expenditures are correct, identify and provide summaries along with supporting documentation of any concerns with recommended corrections to the Manager and Office Director.
- Research, identify, and recommend expenditure adjustments and allocations needed for designated offices to the Manager.
- Conduct financial analysis of expenditure reports to identify necessary adjustments and ensure accurate allocation of funds within designated offices, in compliance with SIGMA financial reporting standards.
- Implement approved expenditure adjustments and allocations within SIGMA and DIFS internal documents.
- Create and review monthly financial (revenue) projection reports for designated offices, identifying and providing summaries along with supporting documentation of any concerns with recommended corrections related to the collection of revenues compared to projections to the Manager and Office Director.
- Responsible for running and reviewing various expenditure-related reports in SIGMA for accuracy and reconciliations.
- Update various internal historical tracking files for revenues and expenditures, allowing for future projections on historical trends.
- Analyze historical and projected data to evaluate annual fee assessments for designated offices, offering recommendations to inform budget development and fiscal strategy.
- Assist the Manager and Office Director with regular meetings and communications with designated Office Directors to discuss budget, expenditure, and revenue needs throughout the fiscal year.
- Develop and analyze procedures and implement improvements to streamline processes, make them more efficient and effective.

Duty 2

General Summary:

Percentage: 40

Responsible for the development, tracking, and monitoring of the overall department budget and designated office budgets, and their associated programs.

Individual tasks related to the duty:

- Design and maintain standardized templates for budget development and work closely with designated offices to ensure timely and accurate submission of budget requests.
- Educate designated offices on their role in the budget process, work with them throughout the process, and respond to inquiries.
- Assess and analyze budget requests for designated offices to formulate recommendations for presentation to the Manager and Office Director.
- Analyze and update legislative tracking documents for budget amounts and boilerplate for designated offices to be provided to Manager and Office Director.
- Conduct monthly reviews of post-enactment office budgets to assess the need for adjustments, discuss findings with the Manager, and present recommendations to the Office Director to ensure fiscal alignment.
- Prepare detailed budgetary recommendations and assess financial requirements by category to construct individualized office budgets, applying zero-based budget approach in collaboration with designated offices.
- Interpret existing legislation, rules, policies, and procedures as they relate to designated offices.
- Review, monitor, and track new legislation for the designated offices for fiscal and policy impacts.
- Create, monitor, and track various boilerplate reports related to designated offices.
- Assist with the budget tasks that are required by the State Budget Office and required to be entered into and submitted into SIGMA.
- Generate and analyze financial reports in SIGMA to verify accuracy and completeness, supporting informed budgetary oversight and decision-making.
- Collaborate with other Office of Financial and Administrative Services sections to ensure all purchasing, procurement, technology, facility, and travel budget needs have been accounted for.

Duty 3

General Summary:

Percentage: 10

Other duties as assigned.

Individual tasks related to the duty:

- Review and make recommendations for various chart of account modifications for coding and tracking in SIGMA.
- Various internal and external surveys related to the designated offices.
- Support designated offices industry accreditation.
- Assist in the creation and validation of cost allocating methodologies for designated offices.
- Monitor and report on all Memorandum of Understanding (MOU) agreements for designated offices.
- Other duties as assigned.

16. Describe the types of decisions made independently in this position and tell who or what is affected by those decisions.

Make decisions related to day-to-day work priorities.

17. Describe the types of decisions that require the supervisor's review.

Decisions that exceed the authority delegated to this position.

18. What kind of physical effort is used to perform this job? What environmental conditions in this position physically exposed to on the job? Indicate the amount of time and intensity of each activity and condition. Refer to instructions.

Position duties and tasks are performed in a traditional office environment which includes considerable sitting, occasional standing, limited lifting; extensive computer usage and normal office duties.

19. List the names and position code descriptions of each classified employee whom this position immediately supervises or oversees on a full-time, on-going basis.

Additional Subordinates

20. This position's responsibilities for the above-listed employees includes the following (check as many as apply):

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|---|--|
| ☐ Complete and sign service ratings. | ☐ Assign work. |
| ☐ Provide formal written counseling. | ☐ Approve work. |
| ☐ Approve leave requests. | ☐ Review work. |
| ☐ Approve time and attendance. | ☐ Provide guidance on work methods. |
| ☐ Orally reprimand. | ☐ Train employees in the work. |

22. Do you agree with the responses for items 1 through 20? If not, which items do you disagree with and why?

Yes

23. What are the essential functions of this position?

Please see Box #14.

24. Indicate specifically how the position's duties and responsibilities have changed since the position was last reviewed.

New position.

25. What is the function of the work area and how does this position fit into that function?

OFAS is responsible for all areas of budget, accounting, procurement, revenue and expenditure, internal controls, travel and vehicle services, facilities, and technology. This position is responsible for the budget, accounting, and revenues and expenditures for the designated offices.

26. What are the minimum education and experience qualifications needed to perform the essential functions of this position.

EDUCATION:

Possession of a bachelor's degree in any major with at least 12 semester (18 term) credits in one or a combination of the following: accounting, finance, or economics.

EXPERIENCE:

Financial Analyst 9

No specific type or amount is required.

Financial Analyst 10

One year of professional experience providing a systematic review, analysis, interpretation, and/or evaluation of budgets, mortgages, loans, or other financial data, equivalent to a Financial Analyst 9, Accountant 9, or Auditor 9.

Financial Analyst P11

Two years of professional experience providing a systematic review, analysis, interpretation, and/or evaluation of budgets, mortgages, loans, or other financial data, equivalent to a Financial Analyst, including one year equivalent to a Financial Analyst 10, Accountant 10, or Auditor 10.

KNOWLEDGE, SKILLS, AND ABILITIES:

- Personal and professional integrity.
- Excellent organization skills.
- Excellent communication skills and the ability to communicate effectively with all levels of public and private sector audiences.
- High degree of initiative and willingness to assume greater levels of responsibility.
- Knowledge of financial management principles and practices.
- Knowledge of the principles and practices of financial analysis.
- Ability to quickly assimilate a variety of oral and written data, (i.e., legal, social, economic, etc.) to analyze facts and draw logical conclusions.
- Works well under pressure.
- Ability to work successfully on multiple, high-visibility projects and provide requested information quickly and accurately.

CERTIFICATES, LICENSES, REGISTRATIONS:

None

NOTE: Civil Service approval does not constitute agreement with or acceptance of the desired qualifications of this position.

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Supervisor

Date

TO BE FILLED OUT BY APPOINTING AUTHORITY

Indicate any exceptions or additions to the statements of employee or supervisors.

N/A

I certify that the entries on these pages are accurate and complete.

ERMELINDA GARZA

Appointing Authority

7/21/2026

Date

I certify that the information presented in this position description provides a complete and accurate depiction of the duties and responsibilities assigned to this position.

Employee

Date