



UNIVERSITY OF NORTH CAROLINA WILMINGTON

**Budget Analyst  
Competency Profile**

**DESCRIPTION OF WORK:** Positions in this banded class provide 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. They 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>
<p>Analysts assist 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 and are familiar with or can learn to use the budget systems. Employees conduct analysis of ongoing spending patterns for program budgets and identify potential areas of concern. Analysts assist in the provision of technical assistance and guidance to agency staff relative to state budget rules and laws.</p>	<p>Analysts review program budgets and expenditures and approve budget revisions for accuracy and program efficiency. They regularly monitor budgets throughout the year and conduct analyses of spending patterns to identify potential strengths and weaknesses. Analysts independently troubleshoot errors and inconsistencies within the budget and provide recommendations to management for program improvements. Analysts review and assist in developing methodologies used in the preparation of spending forecasts, budgets, or budget projections and provide 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 budgetary implications 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. Analysts may review and approve contracts. They serve as a liaison to the Office of State Budget Management.</p>	<p>Analysts have key responsibility for the most complex budget or program issues. Analysts regularly serve as the lead in the design and coordination of advanced level agency-wide projects. Analysts review and interpret proposed rule changes for fiscal impact and legislative reports for submission to the General Assembly. Analysts possess superior analytical and problem solving skills and demonstrate the ability to apply these attributes in the execution of solutions. Analysts have extensive knowledge of the North Carolina budget and administrative structures and the ability to evaluate the best methods for accomplishing agency goals. Analysts have acquired and demonstrated expertise in all diverse areas.</p>

<b>Competencies</b>	<b>Definition</b>
<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.
<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.
<b>Problem Solving</b>	Ability to identify problems, determine possible solutions, and actively work to resolve the issues

Note: Competency statements are progressive and not all competencies apply to every position/employee. Evaluate only those that apply.

Competency	Contributing	Journey	Advanced
<p><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.</p>	<p>Perform a limited variety of recurring and related tasks/functions using steps/processes/applications that are readily understood. Provide assistance to others by troubleshooting simple technical problems. Take requests from others to solve problems of limited complexity. Maintain required educational level and experience criteria.</p>	<p>Apply and interpret professional knowledge to complete tasks. Perform a variety of tasks and functions that involve related or varying processes. Analyze and determine various courses of actions and appropriate services. Solve a variety of problems that require the examination of data and processes to determine the best course(s) of action.</p>	<p>Apply technical, professional, and regulatory knowledge to resolve unique or highly complex situations. Perform a large number of widely varying and functionally diverse assignments that require in-depth analysis and problem solving. Develop work concepts, policies, and procedures using broad guidelines, methods, and procedures. Serve as a “technical expert”; and guide, direct and coach others regarding application and interpretation of complex issues. Apply 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>
Competency	Contributing	Journey	Advanced
<p><b>Analytical Thinking</b> Ability to retrieve, organize and interpret data, assess situations, and provide recommendations.</p>	<p>Identify, understand and determine the significance of issues, causes, problems, and opportunities. Utilize available resources to correctly determine the issues and problems. Implement standard course(s) of action to resolve issues within established timeframes and administrative and technical requirements. Involve supervisor as necessary when dealing with issues to determine the most appropriate course of action.</p>	<p>Analyze issues and problems and propose solutions which are consistent with the agency’s priorities and financial resources. Uses tools to identify meaningful patterns or relationships and draw conclusions about the meaning of the data. Ask clarifying questions and probe for relevant information. Identify cause and effect of problems; look at underlying problems for solution. Collect, relate, associate or compare data to identify options/alternatives. Approach a complex task or problem by breaking it down into its component parts and consider each part in detail.</p>	<p>Identify the impact of events or decisions on stakeholders/ customers. Weigh and prioritize the costs, benefits, risks or chances for success. Identify parameters, limitations, or boundaries that impact programs. Measure outcome of problem resolution and take further action as needed.</p>

<b>Competency</b>	<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p><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.</p>	<p>State information in a clear and concise manner, in both written and oral form. Communicate the information to the appropriate staff in a timely manner. Listens for content and understanding.</p>	<p>Clarify the purpose and importance of the information. Explain the information in understandable terms for non-technical staff.</p>	<p>Structure information in keeping with listener's experience, background, and expectations. Use terms, examples, and analogies that are meaningful to the listener. Use an effective and approachable style that engages others and builds credibility.</p>
<b>Competency</b>	<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p><b>Consulting/Advising</b> Ability to provide advice and counsel. Ability to understand client programs, organization and culture</p>	<p>Listen to customers to identify needs or problems. Convey customer needs to others involved. Offer suggestions to resolve problems or issues.</p>	<p>Determine customer expectations. Determine who should be involved in project or solution. Work together with customer to discuss alternative solutions. Work with customer to resolve issues by applying expert knowledge.</p>	<p>Regularly provide expertise and counsel to internal/external customers (e.g. divisions, department management, others.) Interpret and synthesize data based on broad understanding of organizational impact and professional expertise. Understand relationships and dynamics of program areas as they impact service delivery or project.</p>
<b>Competency</b>	<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p><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.</p>	<p>Can identify both internal and external customers. Respond to customer needs within established parameters.</p>	<p>Anticipate, identify and understand customer's service needs. Identify options, develop solutions and take action when responding to customer needs.</p>	<p>Identify trends that impact service delivery to groups or individual customers. Develop plans to improve service delivery based on customer feedback.</p>

<b>Competency</b>	<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p><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.</p>	<p>Make determinations by following specific guidelines, standard operating procedures, laws, rules, and/or regulations. Consult supervisor as necessary prior to making determinations or conclusions.</p>	<p>Recognize issues, problems or opportunities and determine what action is needed. Gather available information and select option best suited to situation.</p>	<p>Make 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. Recommend changes to federal/state laws and regulations and APA rules that impact programs/activities, local government, or the public.</p>
<b>Competency</b>	<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p><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.</p>	<p>Clarify the current situation, share information openly, and identify issues and concerns of appropriate parties. Identify points of agreement/disagreement and consider the needs and viewpoints of appropriate parties.</p>	<p>Work to keep the discussion focused on key issues. Handle differing points of view in a positive way. Examine relevant viewpoints and explores alternative approaches. Review pros and cons. Consider the needs, concerns, and initial position of all parties. Evaluate options or solutions openly, fairly and engage in mutual problem solving. Facilitate agreement through a give and take process that consider each party's needs.</p>	<p>Challenge participants to reach consensus. Build support for negotiated solution. Respond to objections by emphasizing value of alternatives. Provide follow-up to involved parties to ensure solution meets needs.</p>

<b>Competency</b>	<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p><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.</p>	<p>Understand duties and purpose of his/her position. Recognize how work units interrelate. Understand how primary duties/purpose of the position contributes to accomplishing the goals of the work unit. Recognize the customer and understand his/her role in meeting their needs.</p>	<p>Understand the primary duties/purpose of the work unit and how the unit contributes to accomplishing the goals of the organization. Understand how individual decisions impact the achievement of the organization's goals.</p>	<p>Consider the impact of recommendations, outcomes, and organizational changes on the public. Communicate goals, mission and priorities of the organization when interacting with organizational stakeholders. Identify various customers' changing needs and adapt organizational service delivery system accordingly.</p>
<b>Competency</b>	<b>Contributing</b>	<b>Journey</b>	<b>Advanced</b>
<p><b>Problem Solving</b> Ability to identify problems, determine possible solutions, and actively work to resolve the issues</p>	<p>Identify and acknowledge basic components of delivery systems. Seek resolution to problems. Implement standard course(s) of action to resolve a problem within established timeframes and administrative and technical requirements. Involve supervisor as necessary when dealing with issues to determine most appropriate course of action.</p>	<p>Identify problems that require in-depth analysis. Gather, analyze and interpret information to better understand problems. Create relevant options for solving problems. Choose appropriate action by considering implications and consequences. Seek input from stakeholders (e.g., subordinates, peers, management, customers.) Check outcome of problem resolution.</p>	<p>Anticipate and proactively pursue issues or problems. Recognize inherent problems and issues caused by ineffective and/or overlooked policies, procedures, rules, regulations, and laws. Detect trends, associations, and cause-effect relationships. Include key policy makers and other stakeholders in the decision-making process to ensure buy-in and understanding of issues, problems, and resolutions. Measure outcome of problem resolution and take further action as needed.</p>

**Recommended Minimum Training Guideline** Graduation from a four year college or university with a degree in public administration, business administration, accounting, or a related programmatic field; or an equivalent combination of training and experience. All degrees must be received from appropriately accredited institutions.

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