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JFMIP

December 1994

Continuing Professional Education Study

Budget Analysts in the Federal Government, GS-560 Series



JFMIP-3

Joint Financial Management Improvement Program

The Joint Financial Management Improvement Program (JFMIP) is a joint cooperative undertaking of the Office of Management and Budget, the General Accounting Office, the Department of the Treasury, and the Office of Personnel Management, working in cooperation with each other and with operating agencies to improve financial management practices throughout the government. The Program was initiated in 1948 by the Secretary of the Treasury, the Director of the Bureau of the Budget, and the Comptroller General, and was given statutory authorization in the Budget and Accounting Procedures Act of 1950. The Civil Service Commission, now the Office of Personnel Management, joined JFMIP in 1966.

The overall objective of JFMIP is to make improvements that contribute significantly to the effective and efficient operations of governmental programs. Activities aimed at achieving this objective include:

- ◆ Developing general objectives in those areas of common interest to the central agencies for guiding the improvement of financial management across government and promoting strategies for achieving those objectives.
- ◆ Reviewing and coordinating central agencies' activities and policy promulgations affecting financial management to avoid possible conflict, inconsistency, duplication, and confusion.
- ◆ Undertaking projects and special reviews of significant problems and new technologies in financial management and publishing the findings and conclusions.
- ◆ Acting as a catalyst and clearinghouse for sharing and disseminating financial management information about good financial management techniques and technologies.
- ◆ Reviewing the financial management efforts of the operating agencies and serving as a catalyst for further improvements.

The JFMIP plays a key role in mobilizing resources and coordinating cooperative efforts in the improvement of financial management practices, and relies on the active participation of federal agencies to be successful. The Joint Program is guided by a Steering Committee consisting of key policy officials from each of the central agencies. A key official from a program agency also serves on the Steering Committee. A small staff headed by an Executive Director provides support to the Committee.

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CPE Study

Budget Analysts in the Federal Government, GS-560 Series

Preface

One of the objectives of the Joint Financial Management Improvement Program (JFMIP) is to act as a catalyst and clearinghouse for sharing and disseminating financial management information. Several years ago, we published a report on continuing professional education for federal accountants, as a guide for organizations to establish training and professional development programs in financial management offices.

During the past 2 years, JFMIP has been working with the American Association for Budget and Program Analysis on a study of training and professional development for budget analysts in the federal government. We would like to thank the budget office of the General Services Administration for sharing the information on which this report was based. This final report, *Continuing Professional Education for Budget Analysts*, has been developed to promote professional development within the financial management community and assist budget offices in identifying primary functions, activities, and tasks and knowledge, skills, and abilities for entry, mid-, and senior-level budget analysts in the federal government.


Virginia B. Robinson

December 1994

The first part of the report deals with the general situation of the country and the progress of the work. It is followed by a detailed account of the various projects and the results achieved. The report concludes with a summary of the work done and the prospects for the future.

The second part of the report deals with the financial aspects of the work. It gives a detailed account of the income and expenditure of the organization and shows how the work has been financed. It also discusses the various sources of income and the methods of expenditure.

The third part of the report deals with the personnel of the organization. It gives a detailed account of the staff and the work done by each of them. It also discusses the various methods of recruitment and the methods of training.

The fourth part of the report deals with the general administration of the organization. It gives a detailed account of the various departments and the work done by each of them. It also discusses the various methods of organization and the methods of control.

CPE Study

Budget Analysts in the Federal Government, GS-560 Series

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Budget Analysts in the Federal Government, GS-560 Series

Introduction

There is a major need to expand the government's continuing professional education program. Continuing education and training are essential to attracting and retaining qualified personnel. The objectives of this study are to promote continuing professional education for federal budget analysts, identify training needs, and recommend types of training for budget analysts in their current and future positions. By presenting detailed statements of *Primary Functions, Activities, and Tasks* and *Knowledge, Skills, and Abilities (KSAs)* for budget analysts at various grade levels (entry level GS-5/7, GS-7/9, GS-11, GS-12/13, and GS-14 and above), the Joint Financial Management Improvement Program (JFMIP) hopes to provide a useful resource and reference document for agencies to use when developing comprehensive training plans or creating continuing education curriculums. It can also be used to guide and supplement in-house training plans.

Scope

The Office of Personnel Management defines the primary duties of budget analysts as "performing, advising, or supervising work in any of the phases or systems of federal budget administration in use." In the budget analyst, GS-560 series, there are over 12,400 professionals, the majority of them in the Department of Defense. JFMIP is cognizant of the fact that, in many cases, the training requirements for budget analysts in certain groups or organizations will be unique. This study focuses more on generally applicable rather than unique needs. Training to satisfy these unique needs may have to be customized and done in-house.

Background

In 1990, the JFMIP issued a report on continuing professional education for government accountants. The study described the major functions of government accountants and identified the subject areas encompassing the knowledge, skills, and abilities of federal accountants. Subsequent to the report, a compendium of training courses for government accountants was developed. This compendium is issued twice a year and JFMIP plans to expand its coverage of training opportunities to identify those appropriate for budget analysts.

JFMIP's Steering Committee directed its staff to develop a similar study of training needs for the budget analyst, GS-560 series. The staff worked with representatives from the American Association for Budget and Program Analysis (AABPA)—a non-profit, professional organization devoted to furthering knowledge in budgeting, program analysis, and related fields. AABPA established a technical panel consisting of budget officers and senior analysts to develop the statements of *Primary Functions, Activities, and Tasks* and of *KSAs* for budget analysts.

The project team collected information from civilian agency budget offices and developed *Primary Functions, Activities, and Tasks* and *KSAs* for various levels of budget analysts. As a foundation and starting point, the project team used the General Services Administration's certification program for budget analysts. The team revised this document so that it could be used governmentwide. The draft document was sent to the entire federal financial management community. Agency comments, where appropriate, were incorporated in the final document.

Conclusions and Recommendations

The Government Employees Training Act, chapter 41 of title 5, U.S. Code, provides the basic authorization for employee training throughout the federal government. The Office of Personnel Management provides training oversight along with advice and leadership in personnel management and evaluation. Agency managers are responsible for establishing and implementing an agency's program to ensure professional proficiency through continuing professional education and on-the-job training. The JFMIP has been promoting continuing professional education and training of those in the financial management community. As previously stated, this is the second study JFMIP has conducted on continuing professional education and training for government financial managers.

Based on observations throughout the study, JFMIP still sees a need for the federal government to place more emphasis on career development, training, and continuing education opportunities for financial management staff, especially budget analysts. In the current environment of declining budgets in which many employees are doing more with less, training and continuing professional development are more critical to perform new duties and responsibilities satisfactorily. It is more important now for federal executives and managers to recognize that training and continuing professional education are essential for government employees to perform well. In addition, federal executives and managers, in recognizing employees' desires to continue to grow professionally, should establish a continuing education policy and then develop comprehensive training plans or continuing education curricula. Training, in addition to providing the required knowledge and skills, can increase employees' self-esteem, confidence, and morale. It is also a major factor in helping the federal government retain quality and experienced employees.

There are a variety of duties and functions for budget analysts from budget formulation through budget execution and this report tries to identify the most significant ones. This report includes summaries of *Primary Functions, Activities, and Tasks* and detailed breakouts of *KSAs*, which include subject area and related education recommendations, for budget analysts at the GS-5/7 (entry-level), GS-7/9, GS-11, GS-12/13, and GS-14 and above levels.

The *Primary Functions, Activities, and Tasks* statements summarize what the federal budget analyst should learn and understand about his or her organization's role, mission, and operation; what he or she should learn in order to perform his or her duties; and in what type of activities the budget analyst at each grade level should participate. It also reflects the increasing responsibilities and expectations that come with each successive grade level.

The listing of *KSAs* presents those areas of knowledge and the necessary skills and abilities that federal budget analysts need to perform their functions. The *KSAs* are derived from the *Primary Functions, Activities, and Tasks* statements. Each type of knowledge, skill, and ability is listed along with the subject areas of budgeting with which the budget analyst should be familiar, including recommended courses and educational topics. Some of the information from grade level to grade level is repetitive, due to the fact that not all individuals join a federal agency at the GS-5/7 level and adhere to a career ladder type approach.

Grade Levels of GS-560 Budget Analysts

The following lists of *Primary Functions, Activities, and Tasks* and *KSAs* for each grade level should not be considered a complete training plan, a series of qualification criteria, nor part of the Factor Evaluation System (FES) classification series. The document may be used in conjunction with legally required entrance criteria, and each organization may use it as a resource for enhancing the professional development of the budget analyst, GS-560 series.

In addition, the following caveats should be kept in mind:

- It is impractical and almost impossible to design a generic, one size fits all *KSA* standard for budget analysts in the lower grades. Lower graded budget analysts may be responsible for tracking Congressional action on appropriations, and thus must know the Congressional process in detail, or they may be working on econometric or mathematical models. *KSAs* are often contingent on the nature of the responsibilities of the analyst in the specific department/agency. For this reason also, many of the quantitative skill aspects listed in the text are left general.
- Lower level analysts tend to work at *less* complex tasks, activities, and assignments *under the supervision* of higher grade or senior level analysts; while higher grade level analysts tend to work on *complex* issues with *minimal* supervision.
- Through the succession of grade levels, many *KSA* subject areas are increasingly relevant at higher grade levels as well as in the lower levels though they may not be listed or repeated. In addition, each *KSA* may not have an adjacent related area of education specified; this is because training often occurs on-the-job or is an agency-specific development course and too narrow for the scope of this text.
- Though courses listed in *KSA* subject areas may specify certain fields of study, such as economics or mathematics, keep in mind that the budget analyst is not nor is he/she expected to be an "economist"; however, the budget analyst is expected to work with economists.

The lists, by grade levels, follow.

Grade Level 5/7

Primary Functions, Activities, and Tasks

1. Perform with some understanding of the mission of the agency; its goals and objectives; its role in the federal government; basic organization and functions; and responsibilities of the agency, its components, regional offices, and the organization to which assigned.
2. Perform with some understanding of the authorities under which the agency operates—laws, executive orders, OMB circulars and bulletins, other federal regulations, and internal directives.
3. Perform with some understanding of how the principal operation(s) of the agency (or specific organizational level) works (e.g., procurement, grants, housing, etc.), and how to apply this to the financial management of assigned programs or activities, including the impact on obligation and outlay patterns.
4. Learn basic budgetary and accounting concepts and principles, the basic federal (or bureau or other organizational level) budget process, OMB object classes and data base systems, agency accounting coding structure, and sub-object classes:
 - understand financial document flow for budget execution;
 - learn agency accounting reports and how to prepare current status of funding reports;
 - relate sources of data, including output from automated systems, to assignments;
 - be aware of key performance measurements of the agency and how these measurements enable the agency to meet budgetary objectives.

Grade Level 5/7

Primary Functions, Activities, and Tasks

5. Learn to apply knowledge of the nature, characteristics, applications, and structure of appropriations and funds that support the mission of the agency or bureau.
6. Participate with higher-level analysts in meetings and discussions concerning policies, goals, and procedures for assigned programs or activities.
7. Participate with higher-level analysts in performing various functions, such as preparing instructions, budget exhibits and material, funding documents or reports; apply elementary analysis and calculation techniques—such as cost per FTE and patterns of obligations—to assigned program areas.
8. Interact with bureau or agency personnel and, if appropriate, personnel of other agencies or bureaus; respond to calls and questions about materials and projects worked on.
9. Learn to apply information on how funds are obligated and the meaning behind patterns of obligations.
10. Write effectively; organize assignments efficiently; document assignments clearly.

Grade Level 5/7

Knowledge, Skills, and Abilities

Knowledge of:	Subject Areas of Budgeting and Related Education
<p>The basic missions, functions, and organizational structure of the agency and its offices; and the impact other agencies such as OMB and OPM have on agency operations. More detailed knowledge of assigned program/account areas.</p>	<p>Agency directives, regulations, policies, and procedures; organizational and program orientations; appropriate legal, regulatory, and procedural references and similar activities affecting management and operations; rotational assignments and details.</p>
<p>Public laws, executive orders, OMB circulars and bulletins, and agency directives governing the budget process and assigned program areas.</p>	<p>Budget and Accounting Act of 1921; Congressional Budget and Impoundment Control Act of 1974; Balanced Budget and Emergency Deficit Control Act of 1985; Budget Enforcement Act of 1990 and amendments; Economy Act; Anti-Deficiency Act; OMB Circulars A-11 and A-34; program regulations and operations; and other laws, regulations, circulars, or documents as applicable.</p> <p>Course in: Appropriations law</p>
<p>The federal budget process and how it applies to the agency.</p>	<p>Courses in: The federal budget process Budget formulation Budget presentation Budget execution The Congressional budget process Internal policies and procedures</p>
<p>Nature, characteristics, applications, and structure, in basic terms, of appropriations and other funds that support accomplishment of the agency's mission.</p>	<p>Course in: The federal budget process</p>
<p>The agency's operations and processes and how obligations and expenditures are incurred for assigned program areas.</p>	<p>Program regulations and operations; internal agency budget policies and procedures authorizing statutes.</p>

Grade Level 5/7

Knowledge, Skills, and Abilities

Knowledge of:	Subject Areas of Budgeting and Related Education
Basic budget, accounting and program terminology, concepts, and principles.	Courses in: Government accounting Budget formulation Budget presentation Budget execution
OMB and agency object classes, agency accounting coding, document flow.	Rotational assignments; tracking obligations through accounting system
Proper use of appropriated and other types of funds.	On-the-job training Course in: Appropriations law
The agency system for the administrative control of resources, and the basic operation of the agency's directives and paperwork management system.	Agency's administrative control of funds procedures
Basic analytical techniques and good business practices.	Courses in: Business administration Analytical techniques Appropriate mathematics courses
Skill in:	Subject Areas of Budgeting and Related Education
Basic mathematics.	Appropriate mathematics courses through algebra
Basic computer literacy.	Courses in: Basic computer use Software packages used by agency Spreadsheet and graphics Presentation software

Grade Level 5/7

Knowledge, Skills, and Abilities

Ability to:	Subject Areas of Budgeting and Related Education
Communicate and present information in writing.	Courses in: Basic communication skills Preparing and editing correspondence, reports and presentations Briefing and presentation techniques Writing skills workshop
Communicate and present information orally.	Courses in: Basic communication skills Public speaking Briefing and presentation techniques
Perform routine coordination with central and regional office personnel in assigned areas.	On-the-job training
Gather data and maintain records.	Course in: Data gathering and analysis
Analyze and interpret information.	Courses in: Budget analysis techniques Budget estimating techniques Problem-solving and decision-making
Manage time to meet deadlines.	On-the-job training Course in: Time management

Grade Level 7/9

Primary Functions, Activities, and Tasks

1. Apply increasing knowledge of the agency's or bureau's organization and functions, and how subunits interact.
2. Apply understanding of authorities under which the agency or bureau operates and which govern the federal budget and the processes related to the agency's or bureau's principal operations.
3. Perform with an understanding of the nature, characteristics, applications, and structure of appropriations and funds that support the agency's or bureau's mission.
4. Participate in meetings and discussions with management officials and program managers pertaining to assigned areas; suggest potential items for discussion.
5. Perform the following:
 - Gather data necessary for tracking and evaluating assigned programs or activities, and assist in suggesting new ways to collect or use the data gathered.
 - Use accounting reports, analyze and prepare projections of funding through the end of the fiscal year, compare actuals to estimates.
 - Develop a broad understanding of OMB Circular A-34 and OMB data base systems.
 - Develop an understanding of the meaning and use of both personnel and non-personnel object classes.
6. Perform various functions, such as reviewing directives, instructions, budget materials, funding documents, or reports; apply analytical techniques to assigned program areas; carry out routine functions under general supervision.

Grade Level 7/9

Primary Functions, Activities, and Tasks

- 7. Initiate contact with agency or bureau personnel and, if appropriate, personnel of other agencies, at the central and regional offices to gather information and inform contacts of latest program status.**
- 8. Perform financial analyses.**
- 9. Apply economic concepts to budget work, as necessary.**
- 10. Learn the basic components of the agency's internal control program including identification of material weaknesses and development of a strategy for correcting deficiencies.**

Grade Level 7/9

Knowledge, Skills, and Abilities

Knowledge of:	Subject Areas of Budgeting and Related Education
The basic missions, functions, and responsibilities of the agency and its offices; and the impact Congress and other agencies such as OMB and OPM have on agency operations. More detailed knowledge of assigned program/account areas.	Political process; how laws are passed. Rotational assignments and details
Details of public laws, executive orders, OMB circulars and bulletins, and agency directives governing the budget process and assigned program areas.	Course in: Appropriations law
All aspects of the federal budget process and how it applies to the agency.	Course in: Budget formulation
Nature, characteristics, applications, and structure, in general terms, of appropriations and other funds that support accomplishment of the agency's mission.	On-the-job training
Agency budget principles and procedures; the agency's financial system; and program terminology, concepts, and principles.	On-the-job training
Workings of the agency system for the administrative control of resources, including procedures for allocating funds; basic operation of agency's operations, directives, and paperwork management systems.	OMB circulars, standard forms, and bulletins on procurement and financial assistance
Principles of budget and financial analysis and good business practices.	Courses in: Economics Business statistics Financial analysis - net present value
Internal controls.	Course in: Internal controls

Grade Level 7/9

Knowledge, Skills, and Abilities

Skill in:	Subject Areas of Budgeting and Related Education
Accounting.	OMB Circular A-34
General mathematics.	Appropriate mathematics courses
Computer literacy, including word processing, spreadsheet programs.	Courses in: Basic computer use Software packages used by agency Data base concepts, applications and maintenance
Ability to:	Subject Areas of Budgeting and Related Education
Communicate and present information and ideas in writing.	Courses in: Basic communication skills Preparing and editing correspondence, reports and presentations Briefing and presentation techniques Writing skills workshop (e.g., writing effective budget justifications)
Communicate and present information and ideas orally.	Courses in: Basic communication skills Public speaking Briefing and presentation techniques
Perform routine coordination with central and regional office personnel in assigned areas.	On-the-job training
Gather data and maintain records.	Course in: Data gathering and analysis
Analyze and interpret information.	Courses in: Budget analysis techniques Budget estimating techniques Problem-solving and decision-making
Work effectively under the pressure of tight timeframes and rigid deadlines.	Course in: Stress management
Manage time to meet deadlines.	Course in: Time management

Grade Level 11

Primary Functions, Activities, and Tasks

1. Perform with increasing knowledge of the agency's or bureau's organization and functions and how subunits interact; broaden knowledge of the authorities under which the agency or bureau operates and which govern the federal budget and the agency's or bureau's operations and processes; explain processes to new employees and to non-government personnel, if applicable.
2. Apply knowledge about the nature, characteristics, applications, and structure of appropriations and funds that support the agency's or bureau's mission.
3. Utilize a detailed understanding of OMB Circular A-34, OMB Circular A-11, and OMB data base systems, as appropriate.
4. Apply the concept of performance measures in the budget process; justify budgets using performance measures
5. Utilize knowledge of the congressional appropriations process and other legislative processes, including the history of specific provisions and set-asides.
6. Assist in directing meetings and discussions with management officials and program managers on policies and goals for assigned areas; be responsible for setting portions of the agenda.
7. Gather data for tracking and evaluating assigned programs; use financial, economic, statistical, and workload analysis techniques to analyze program status and direction; present alternatives and recommendations in problem areas.

Grade Level 11

Primary Functions, Activities, and Tasks

- 8. Carry out responsibility for a major portion of some function, such as preparing a directive, instruction, budget or financial materials, or report under periodic supervision.**
- 9. Respond to inquiries about laws, regulations, policies and procedures governing the budget process.**
- 10. Make oral presentations to groups as required.**
- 11. Anticipate issues, develop solutions pertaining to assigned areas of responsibility.**

Grade Level 11

Knowledge, Skills, and Abilities

Knowledge of:	Subject Areas of Budgeting and Related Education
The missions, functions, and responsibilities of the agency and its offices; and the impact Congress and other agencies such as OMB and OPM have on agency operations. More detailed knowledge of assigned program/account areas.	Rotational assignments and details
Details of public laws, executive orders, OMB circulars and bulletins, and agency directives governing the budget process and assigned program areas.	Detail to Hill; workshop on workings of the Congress and the Judiciary
All aspects of the federal budget process and how it applies to the agency.	On-the-job training
Nature, characteristics, applications, and structure, in general terms, of appropriations and other funds that support accomplishment of the agency's mission.	On-the-job training
Agency budget principles and procedures; agency financial system, program terminology, concepts, and principles; work measurement and productivity measurement systems.	On-the-job training
Workings of the agency system for the administrative control of resources, including allocation and control procedures, agency operations, inter- and intra-agency reimbursable agreements and funding, directives, and paperwork management systems, and how to use them to carry out program objectives.	On-the-job training
Principles of budget and financial analysis and good business practices.	Seminars/symposia dealing with current issues and concepts
Internal control systems within the agency.	On-the-job training
Performance measures.	Course in: Performance measures
Congressional appropriations process.	Course in: Appropriations law

Grade Level 11

Knowledge, Skills, and Abilities

Skill in:	Subject Areas of Budgeting and Related Education
Mathematics, basic economics and statistics.	Appropriate math, economics and statistics courses.
Computer literacy, including word processing, spreadsheet, graphics and communications programs.	Courses in: Software used by agency Data base concepts
Ability to:	Subject Areas of Budgeting and Related Education
Communicate and present information and ideas in writing and advocate positions in writing.	Advanced course in: Written communications
Communicate and present information and ideas and advocate positions orally.	Advanced course in: Oral communications
Research data, interpret information, prepare analyses, including cost-benefit analysis, and make recommendations.	Identification of issues, effective decision-making Course in: Cost-benefit analysis
Work effectively under the pressure of tight timeframes and rigid deadlines.	Course in: Personal effectiveness techniques
Prepare schedules for self and others to meet internal and external deadline commitments.	Courses in: Management skill development Effective planning techniques

Grade Level 12/13

Primary Functions, Activities, and Tasks

1. Operate independently and make decisions based on broad knowledge of the agency's or bureau's organization and functions, the authorities under which the agency operates and which govern the federal budget and the agency or bureau operations, and a detailed understanding of both OMB Circular A-34 and OMB Circular A-11 (if/where applicable to job assigned).
2. Be able to identify and discuss changes in the structure or content of appropriations and funds to better accomplish the agency's or bureau's mission.
3. Establish the need for and direct meetings and discussions with management officials and program managers on policies and goals for assigned areas; be responsible for setting the agenda.
4. Gather data and track progress of assigned programs or activities; evaluate status and present alternatives and recommendations in problem areas using financial, economic, statistical and workload analysis techniques.
5. Carry out responsibility for a major portion of some function, such as reviewing or preparing a directive, instruction, budget justification, funding document, or report, with minimal supervision.
6. Interpret the budgetary aspects of laws, regulations, policies and procedures, and provide guidance to other agency or bureau offices or to regional offices counterparts on operating with established authorities; make suggestions for or propose new policies or procedures based on understanding of these authorities.

Grade Level 12/13

Primary Functions, Activities, and Tasks

7. Be able to answer questions orally on assigned budget material reflecting agency policy and correct technical information.
8. Explain budget concepts, processes, and assignments to lower graded analysts leading to mentoring by the GS-13 level. Learn how to organize and manage small groups on definitive projects.

Grade Level 12/13

Knowledge, Skills, and Abilities

Knowledge of:	Subject Areas of Budgeting and Related Education
Current missions, functions, and responsibilities of the agency and its offices; and the impact Congress and other agencies such as OMB and OPM have on agency operations. More detailed knowledge of assigned program/account areas.	Rotational assignments and details
Details of public laws, executive orders, OMB circulars and bulletins, and agency directives governing the budget process and assigned program areas; how they relate to or impact one another, and how to propose changes; familiarity with GAO and court opinions that affect interpretation of these rules.	Course in: Appropriations law
All aspects of the federal budget process and how it applies to the agency; work measurement and productivity measurement systems; the agency financial system, program terminology, concepts, and principles.	Courses in: Federal budget process Budget formulation Budget estimating techniques Writing effective budget justifications Budget presentation and justification Budget execution
Strategic planning process and how it relates to the budget formulation process.	Course in: Strategic planning
Nature, characteristics, applications, and structure, in general terms, of appropriations and other funds that support accomplishment of the agency's mission.	On-the-job training
Workings of the agency system for administrative control procedures, agency's operations, directives, and paperwork management systems, and how to use them to carry out program objectives.	Courses in: Program analysis Project management
Principles of budget, financial and economic analysis; good business practices; and general management principles for planning and controlling activities in assigned areas.	Accounting controls—how to insure data integrity; seminars and symposia on current issues, broad concerns, and state of the art thinking.

Grade Level 12/13

Knowledge, Skills, and Abilities

Skill in:	Subject Areas of Budgeting and Related Education
Mathematics, basic economics and statistics, and structured problem-solving techniques.	Courses in: Operations research analysis Trend analysis Decision-tree analysis techniques Other techniques
Computer literacy, including word processing, spreadsheet, graphics and communications programs.	Data base structure, design and use
Ability to:	Subject Areas of Budgeting and Related Education
Communicate and present information and ideas and advocate positions both orally and in writing.	Course in: Negotiation skills
Research data, interpret information, prepare analyses, and make recommendations.	On-the-job training Course in: Data analysis
Work effectively under the pressure of tight timeframes and rigid deadlines.	Courses in: Stress management Time management
Explain budget concepts, facts, and instructions to others, including lower graded analysts.	Courses in: Group problem-solving techniques Team building Basic supervision

Grade Level 14 and Above

Primary Functions, Activities, and Tasks

At this level, a budget analyst often assumes supervisory/managerial duties and responsibilities. The functions, activities, and tasks are more general in nature and include those comparable to those of any type of federal manager who assumes supervisory/managerial duties and responsibilities. However, a budget manager often is a working supervisor who must understand and apply all budgetary techniques. A budget person at this stage may also need "political savvy" to function effectively.

A supervisor at this level must have experience in developing and monitoring agency level goals and objectives through action plans, performance appraisals, general management reviews, etc. He or she will have responsibility for audit resolution activities or FMFIA reporting for a service/staff or regional office. An assignment may also include development of service or staff level support for the preparation of the annual financial statement report.

A non-supervisory GS-14 Budget Analyst, where that position exists, is expected, normally, to be an expert in some particular area, usually one of high complexity.

Grade Level 14 and Above

Knowledge, Skills, and Abilities

Knowledge of:	Subject Areas of Budgeting and Related Education
<p>Expert knowledge of budget formulation, presentation and execution. Knowledge of current program and budget issues and state-of-the-art developments in the budget field. Knowledge of areas outside of budget which have financial importance to the programs of the agency.</p>	<p>Continuing education in the budget field. Interaction with peers and participation in professional seminars and symposia. Training in a variety of financial management or business areas</p>
<p>Principles of budget and financial analysis and good business practices.</p>	<p>Impact of the economy on the budget</p>
Skill in:	Subject Areas of Budgeting and Related Education
<p>Areas of negotiation, conflict resolution, persuasion, and motivation; listening.</p>	<p>Courses in these topics</p>
Ability to:	Subject Areas of Budgeting and Related Education
<p>Work with others in a courteous, controlled, and professional manner in high pressure and high stress situations. Listen, understand, and consider rationally issues raised by others.</p>	<p>Courses in: Personnel management and related topics</p>
<p>Express ideas and facts in individual or group situations to impart understanding of agency policies and requests; make oral presentations to executives, in hearing formats, and to large groups. Express succinct, organized facts and ideas in writing.</p>	<p>Course in: Effective presentation skills</p>

Grade Level 14 and Above

Knowledge, Skills, and Abilities

Ability to:	Subject Areas of Budgeting and Related Education
Plan, develop and integrate strategies using technology to manage and improve the financial management of the program area; understand the impact technological changes have on the analysis and production of the budget.	Training in new-to-the-government software developments, such as data bases, project management applications, and use of <i>Internet</i> .
Utilize available resources and administrative procedures necessary to support program and policy implementation.	Course in: Advanced management
Develop and structure the financial processes necessary to carry out program goals, objectives, and priorities; monitor the overall status of program activities. Utilize analytical and problem-solving techniques to accomplish goals.	On-the-job training
Perform supervisory/managerial duties and responsibilities: plan, control, lead, organize; effectively guide individuals or groups to accomplish tasks.	Course in: Federal supervisory/managerial training
Manage people and resources to produce high quality products.	Course in: Organizational behavior

CPE Study

Budget Analysts in the Federal Government, GS-560 Series

Appendix

Major Contributors to this Report

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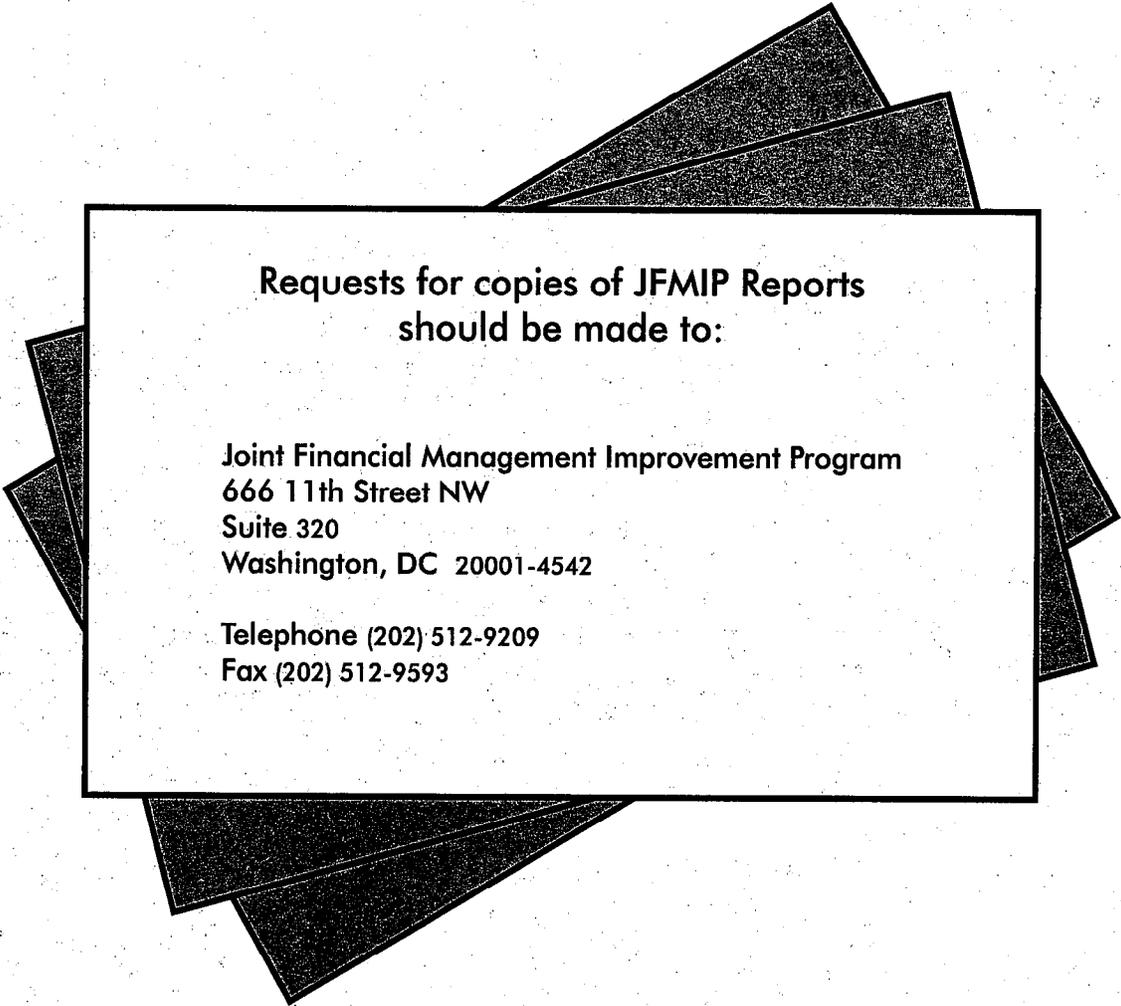
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