

**POSITION DESCRIPTION** (Please Read Instructions on the Back)

1. Agency Position No.  
**IE00374**

2. Reason for Submission  
 Redescription     New  
 Reestablishment     Other

3. Service  
 Hdqtrs     Field

4. Employing Office Location  
**Washington, DC**

5. Duty Station  
**Albuquerque, NM**

6. OPM Certification No.

Explanation (Show any positions replaced)  
**2015 BIE Reorganization**

7. Fair Labor Standards Act  
 Exempt     Nonexempt

8. Financial Statements Required  
 Executive Personnel Financial Disclosure     Employment and Financial Interest

9. Subject to IA Action  
 Yes     No

10. Position Status  
 Competitive  
 Excepted (Specify in Remarks)  
 SES (Gen.) SES (CR)

11. Position Is  
 Supervisory  
 Managerial  
 Neither

12. Sensitivity  
**5- MBI**

13. Competitive Level Code

14. Agency Use  
 Telework: 4

15. Classified/Graded by	Official Title of Position	Pay Plan	Occupational Code	Grade	Initials	Date
a. Office of Personnel Management						
b. Department, Agency or Establishment						
c. Second Level Review	<b>BUDGET ANALYST</b>	<b>GS</b>	<b>0560</b>	<b>12</b>	<b>DAW</b>	
d. First Level Review						
e. Recommended by Supervisor or Initiating Office						

16. Organizational Title of Position (if different from official title)

17. Name of Employee (if vacant, specify)

18. Department, Agency, or Establishment  
**Department of the Interior**

a. First Subdivision  
**Assistant Secretary- Indian Affairs**

b. Second Subdivision  
**Bureau of Indian Education**

c. Third Subdivision  
**School Operations Division**

d. Fourth Subdivision  
**Bureau Operated Schools**

e. Fifth Subdivision

19. Employee Review-This is an accurate description of the major duties and responsibilities of my position.

Signature of Employee (optional)

20. **Supervisory Certification.** I certify that this is an accurate statement of the major duties and responsibilities of this position and its organizational relationships, and that the position is necessary to carry out Government functions for which I am responsible. This certification is made with the knowledge that this information is to be used for statutory purposes relating to appointment and payment of public funds, and that false or misleading statements may constitute violations of such statutes or their implementing regulations.

a. Typed Name and Title of Immediate Supervisor  
**Vicki Forrest, Deputy Bureau Director, School Operations**

b. Typed Name and Title of Higher-Level Supervisor or Manager (optional)

Signature      Date      Signature      Date

21. **Classification/Job Grading Certification.** I certify that this position has been classified/graded as required by title 5, U.S. Code, in conformance with standards published by the U.S. Office of Personnel Management or, if no published standards apply directly, consistently with the most applicable published standards.

22. Position Classification Standards Used in Classifying/Grading Position  
**JFPCS for Professional & Administrative Work in the Accounting & Budget Group, GS-0500: Budget Analysis, GS-0560 Series (Dec 2000)**

Typed Name and Title of Official Taking Action  
**Dorothy A. Willie, HR Specialist (Class)**

Information for Employees. The standards, and information on their application, are available in the personnel office. The classification of the position may be reviewed and corrected by the agency or the U.S. Office of Personnel Management. Information on classification/job grading appeals, and complaints on exemption from FLSA, is available from the personnel office or the U.S. Office of Personnel Management.

23. Position Review	Initials	Date	Initials	Date	Initials	Date	Initials	Date
a. Employee (optional)								
b. Supervisor								
c. Classifier								

24. Remarks  
**Full Performance Level. Indian Preference. Occasional Driver. Subject to annual Financial Disclosure and Ethics Training requirements.**

**BUS CODE: 1012**

25. Description of Major Duties and Responsibilities (See Attached)

**BUDGET ANALYST**  
**GS-0560-12**

**A. INTRODUCTION**

To meet its trust responsibility to Indian Tribes, Bureau of Indian Education (BIE) works to strengthen educational opportunities for American Indian students to be successful and competitive globally; to enhance student participation in their tribal communities; and support tribes in nation-building, in development of the next generation of tribal leaders.

This position is located in the Office of the Deputy Bureau Director-School Operations (DBD-SO). The incumbent will be responsible for gathering, comparing and correlating information about projected costs of education programs and other activities, working closely with management in budget formulation, development, justification, presentation, and execution activities associated with all BIE programs and activities.

**B. MAJOR DUTIES AND RESPONSIBILITIES**

The incumbent is under the general supervision of the BIE Budget Officer, responsible for planning and carrying out annual and multi-year budgeting in support substantive tribal/schools budget system programs and support activity. Collects, coordinates, analyzes and disseminates budgetary, statistical, logistical and demographic data as related to program planning, budget development and annual budget submission.

In the budget formulation process, incumbent will assist supervisor to project costs of the current year and future programs of all BIE activities. Incumbent will work with assigned segments of the BIE organizations in the development of budget requests and related supporting documentation based on discussion of their needs and other projected costs.

Participates in meetings and conferences concerned with the overall management of the operating programs of the BIE and evaluates management decisions on program, financial, manpower and other matters.

In the budget execution, Reviews, analyzes, edits, and consolidates budget submissions for serviced BIE organizations for Budget supervisor. Identifies requirements, short-falls and trade-offs and prepares appropriate supporting documentation. Incumbent may be asked to develop a formal presentation of the budgets for higher level management to defend and explain estimates.

Serves as one of the Budget Officer's principal advisors on matters school-wide in scope, including policy formulation and program development. Functions as the primary consultant to the Budget Officer on matters involving significant considerations in areas of responsibility and in this capacity, recommends approval/disapproval or modification of program plans to the Budget Officer. Confers with the Budget Officer on important problems encountered and advises them on the course of action to pursue to achieve desired objective within the framework of established policies. Assists the Budget Officer with budget office leadership by fostering understanding and acceptance of sound program planning.

Assists supervisor with preparation of briefing materials that will identify the status of projects in progress, provide alternatives and make suggestions as to possible changes to current and future projected costs in education programs.

Gathers and prepares BIE input and review of strategy statements and issue draft response to Budget supervisor to support budgetary requests for BIE programs.

For the budget execution phase, incumbent receives budget planning and estimates completed by assigned organizations. Reviews, analyses and compiles budget estimates to report to Budget supervisor. Works closely with management to develop a strong, defensible budget justification. Provides advice and technical support to organizations throughout BIE in the preparation of budget estimates and justifications, including interpreting OMB, BIE, IA and Departmental directives, circulars and policies, reviewing and editing their budget submissions for reasonableness, accuracy, and conformance with procedures and guidelines, negotiating budget funding amounts, timing, and changes with them as necessary; monitoring budget and recommending reprogramming of funds as needed.

Performs budget execution duties in support of the Budget Officer. On receipt of funding documents from Central Office, incumbent provides for the distribution of allocations to funds centers by working with program directors as required. Furnishes advice and assistance to management on any required programming requirements that are necessary to accomplish goals and objectives for the current year. Is responsible for propriety of expenditures and compliance with laws and regulations for fiscal management.

Continuously reviews the budget process and ensures the various funds are used in accordance with specified uses. Reports the need for transfer of funds between object class and line item accounts under the same budget account and identifies the need for reprogramming between budget accounts. Monitors year-end closing to ensure proper and full use of provided funds.

Monitors the budget execution (i.e., obligation and expenditure of funds) status of schools/ADDs their operating budgets to assure that funds are properly allocated and are being obligated and spent in a timely and effective manner in support of authorized management objectives. Recommends adjustments, such as redistribution of funds within budget accounts, in response to changes in programs, staffing levels, and/or funds availability. Exercises budget controls through reviews and approves the obligation and expenditure of funds for management and administrative purposes.

Incumbent is responsible for analyzing and evaluating program operations and financial resources management, and providing recommendations to resolve potential problems and issues of effectiveness and efficiency of BIE program operations in meeting established budgetary goals and objectives. Analyzes historical and ongoing financial, budgetary activity and identifies actual or potential problem areas, program accomplishments, areas of imbalance, or other similar factors in the assigned programs from the financial aspect.

Devises appropriate methods for securing information and developing data from such sources as the FBMS, on-site investigations, and discussions with program management. Plans budget submissions, and Status of Funds/Obligations Report(s) to analyze problem accomplishments and resource utilization.

C. FACTORS (Budget Analysis Series, GS-0500 Group: GS-0560)

1. Knowledge Required by the position (Level 1-7, 1250 pts)

Detailed and extensive knowledge of the Congressional, OMB, DOI, and BIE budget procedures, process and requirements in order to perform the full complement of the budgetary process in order to formulate, justify and allocate funds to assigned programs of BIE.

In-depth knowledge of BIE organizational structure and its functions, goals, objectives in order to participate in the formulation of program planning and procedural changes, budgets, execution and evaluation.

Extensive knowledge of authorizing legislation that affects BIE programs, for use in justifying and defending budget requests and making determinations and recommendations on the appropriate use of resources.

Skill in the identification, analysis and resolution of a range of budgetary problems associated with development of budget execution plans for various funded BIE activities. Funding is subject to change and may require reprogramming throughout the fiscal year.

Knowledge of the Federal Finance System in order to analyze and prepare financial reports for assigned programs.

Ability to present facts and recommendations in a clear, concise manner both orally and in writing for presentation to BIE officials.

2. Supervisory Controls (Level 2-4, 450 pts)

The incumbent is under the general supervision of the Supervisory Budget Analyst, who makes assignments in terms of deadlines, program objectives and priorities. The incumbent plans and carries out the work independently, resolving most of the conflicts, and keeping the supervisor informed of significant programmatic changes. Incumbent provides recommendations for changes in the budget process and/or plans in order to meet program objectives. Work is reviewed for effectiveness in meeting budgetary requirements and overall approach.

3. Guidelines (Level 3-4, 450 pts)

Guidelines include Congressional legislation, Senate and House Committees Hearings and Reports, appropriations language in approved budgets, OMB circulars, budget circulars and policy directives. Guidelines provide a general outline of concepts, methods and procedures of budgeting and may not deal with every facet of BIE's budget process. The incumbent exercises a great deal of judgment and discretion, and has broad latitude in interpreting guidelines BIE-wide. The employee devises new methods, techniques and criteria in identifying trends and patterns; acquiring information, and analyzing data, and developing solutions and presenting findings.

4. Complexity (Level 4-5, 325 pts)

The work consists of projects and studies that require analysis of interrelated issues and effectiveness, efficiency, and productivity, developing recommendations to resolve financial/budget issues and problems. Applies qualitative and quantitative analytical techniques that frequently require modification to fit a wide range of variables. As BIE contact, the incumbent recommends program and funding priorities, formulates budget documents, prepares justifications, allocates funding, and assesses funding impact. Planning processes for annual, two-year, and three-year periods are conducted concurrently, and must be adjusted as emphases shift and initiatives are curtailed. The incumbent initiates and defends requests for program funding, develops briefing material in a variety of formats for management to use in advocating budget increases, respond to requests for explanatory information, and finalize reports related to program effectiveness. Funding sources include appropriations and reimbursable using numerous accounts and sub-accounts for which the incumbent recommends strategy and determines priorities. Decisions regarding what needs to be done include major areas of uncertainty in approach, methodology, or interpretation of the evaluation process resulting from continuing changes in program emphasis and direction, organizational changes, conflicting program and budgetary requirements.

5. Scope and Effect (Level 5-5, 325 pts)

The purpose of the work is to assess the effectiveness and efficiency of BIE programs and operations and recommend solutions on its short and long term financial resources management plans and issues/problems. The incumbent identifies long-range goals and objectives, and develops the strategies for obtaining required resources to accomplish them. The incumbent provides budgetary guidance, ensuring compliance of budgetary operations with BIE, OMB and Departmental policy. Decisions made concerning the technical treatment of budget estimates support the timely achievement of the budgetary and program goals of BIE.

The scope of this position is Bureau wide, including service to numerous Tribal entities and involves the execution of long range budget plans to implement a wide variety of substantive bureau wide programs and services. Affects the proper fiscal control for utilization of appropriated and miscellaneous non-appropriated funds. The work also affects the way financial information is applied in planning bureau wide organizational operation, use of funds and management control system, accounting systems, and program operations throughout the Bureau. Work affects the timely performance of Bureau regulatory activities and delivery of services to tribes nationwide.

6. Personal Contacts & 7. Purpose of Contacts (Level 3/Level C: 180 pts)

Contacts with BIE staff, OMB and Departmental officials, tribal representatives, Congressional officials, contractors, and the general public, occur in meetings or by telephone. The purpose of contacts is to provide interpretation of policy and procedures, regarding financial reports, regulations, and reviews, and to compile, monitor and adjust budget matters in accordance with program plans and policy directives.

8. Physical Demands (Level 8-1, 5 pts)

The work is mostly sedentary. Some walking and standing is required, and there is no heavy lifting.

9. Work Environment (Level 9-1, 5 pts)

Work is performed in an office setting, which is adequately lighted, heated, air conditioned and ventilated..

(Total Points` 2990; converts to GS-12)

D. OTHER WORK CONDITIONS AND REQUIREMENTS

The incumbent may be required to work other than normal hours as necessary to handle emergency situations or peak workloads. Appropriately handles and safeguards sensitive and/or classified information in accordance with regulations to reduce potential compromise. Work requires travel away from the duty station on field assignments. Travel involves transit via airplane and motor vehicle.

The incumbent is required to have a valid State driver's license when operating a motor vehicle on the job and in travel status.

Position is subject to Financial Statement requirements: Incumbent is required to file an OGE Form 450, Executive Branch Confidential Financial Disclosure Report upon entering the position and annually, in accordance with 5 CFR 2634, and Executive Order 12674, as modified by Executive Order 12731. Incumbent can file OGE Optional Form 450-A to meet the annual requirement, but must file the long form (OGE Form 450) every fourth year or general election year.

Position is subject to a favorable background investigation.

FLSA Determination: 5 U.S. Code §551.206 Administrative exemption criteria. This position matches the description of positions in Subpart (h) of these criteria. The incumbent is responsible for gathering, comparing and correlating information about projected costs of education programs and other activities, working closely with management in budget formulation, development, justification, presentation, and execution activities associated with all BIE programs and activities. Extensive knowledge of the Congressional, OMB, DOI, and BIE budget procedures, process and requirements is required to perform the full complement of the budgetary process. Subpart (h) reads "Employees in certain occupations typically assist and support line managers and assume facets of the overall management function. Neither the location of the work nor the number of employees performing the same or similar work turns such work into a production function. For example, independent agencies or agency components often provide centralized human resources, information systems, procurement and acquisition, or financial management services as support services to other agencies or agency components. ....Similarly, employees who develop, interpret, and oversee agency or Government-wide policy are performing management support functions. ..." **FLSA Designation: Exempt.**

BUS CODE Determination: Unit description for Bureau of Indian Affairs (BIA) in the current Bureau of Indian Affairs & FISE-AFT Local 4524 Agreement (dated October 2011) includes all professional and nonprofessional employees of the Bureau of Indian Affairs Central Office located at Washington, D.C., Reston, Virginia, and Albuquerque, New Mexico, excluding managerial officials, supervisors, and employees described in 5 U.S.C 7112(b)(1),(2),(3),(4),(6) and (7). This position does not meet any of allowed exclusions under 5 U.S.C 7112(b) for exception from bargaining unit membership.  
**BUS Code designation: 1012**

Telework Determination: BIE has determined this position is suitable scheduled, situational and for emergency telework. **FPPS Code: 4**

POSITION DESCRIPTION ADDENDUM  
MOTOR VEHICLE OPERATION – INDIAN AFFAIRS

Title: Budget Analyst\_\_\_\_\_

Pay Plan/Series/Grade: GS-0560-12\_\_ Position Number: \_IE00374\_\_\_\_\_

Organization: School Operations Division/Bureau Operated Schools\_\_\_\_\_

Duty Station: Albuquerque, NM\_\_\_\_\_

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The incumbent of this position will:  
[Place an "X" next to appropriate category]

**Regularly** operate government vehicles or equipment to perform the duties of the position.

**X** Occasionally operate a motor vehicle, but not on a regular basis.

Not be required to operate a vehicle.

Employees occupying positions with the requirement to **regularly** operate a vehicle must successfully complete the web-based National Safety Council Defensive Driving Course every 3 years.

*All positions are subject to the Indian Affairs Motor Vehicle Operation Policy. Incumbents must be in compliance with all policy requirements depending upon position motor vehicle operation status.*

U.S. OFFICE OF PERSONNEL MANAGEMENT

INVESTIGATE POSITION DESIGNATION OF NATIONAL SECURITY AND PUBLIC TRUST POSITIONS (SUMMARY)

**Position Designation Record**

Agency Department of the Interior; AS-IA; Bureau of Indian Education  
 Position Title Budget Analyst  
 Series and Grade/Pay GS-0560-12  
 Band  
 Position Description # \_\_\_\_\_  
 Number

Potential for Compromise or Damage

**Duties**

Investigation, oversight, and audits of government personnel, programs, and activities (includes access to complete investigative files)

Protection of government funds (fiduciary responsibilities or other duties, such as developing statements of work, with the potential for realizing significant personal gain)

Protection of personal, private, controlled unclassified, or proprietary information (includes access to or processing of personal information such as that protected by the Privacy Act (PA) of 1974, Freedom of Information Act (FOIA), financial data, government information that is for "Official Use Only," or privileged information involving the award of contracts, contractor proprietary information, etc.)

**Degree of Potential for Compromise or Damage**

- Conducts internal and/or external non-criminal investigations, inquiries, or audits, the outcome or compromise of which could cause moderate harm
- Obligates, expends, collects or controls funds or items with monetary value of less than \$2 million, but only when meaningful controls are in place to monitor the process and detect abuse; otherwise, value may not exceed \$1 million
- Audits or analyzes budgets or other financial records, with potential for limited impact on government programs or operations
- Procures (or secures funding for) goods and/or services with monetary value less than \$2 million annually the compromise of which could cause limited impact on government programs or operations
- Access to personal, private, proprietary, or sensitive but unclassified/controlled unclassified information, the unauthorized disclosure of which could cause limited damage to individuals, business entities, or government programs or operations or any potential damage is limited to the local level

Adjustment for Program Designation and Level of Supervision

**Adjustments**

Adjustment for Scope of Program and Correlation to Extent of Impact (see definitions)

Adjustment for level of supervision or other controls

**Label**

Multi-agency impact

Periodic, ongoing review - ability to act independently a lot of the time

Total Points Designation

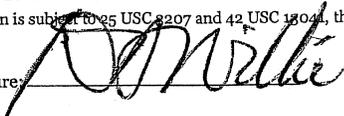
Label	Points
Total Initial Position Designation Points from Step 2	17
Adjusted Position Designation Points from Step 3	17

Suitability

Investigation	Form Required
MBI	SF 85P

**Designator Notes/Justification/Comments**

Position is subject to 25 USC 2207 and 42 USC 17044, therefore MBI-CNACI. Final Designation: MBI with Childcare.

Signature:  Date: 9/29/2015

Name: Dorothy A. Willie, HR Specialist  
 (Class)