

SENATE FISCAL AGENCY
Job Description



POSITION TITLE: Director

IMMEDIATE SUPERVISOR: Senate Fiscal Agency Governing Board

SUMMARY: The Director is responsible for the organization, management and performance of all duties and functions of the Senate Fiscal Agency as provided in the Senate Fiscal Agency Administrative Rules and Procedures. The Director shall also be responsible for all policy decisions concerning the Agency, its work products, contractual relationships, financial management and public relations.

DUTIES AND RESPONSIBILITIES:

1. Assume full management responsibility for the Agency including supervision of the budget; approval of Agency expenditures; establishing the employee salary schedule, office procedures and policies; and the selection of Agency personnel.
2. Act as a liaison between the Senate Fiscal Agency Governing Board and the employees of the Agency.
3. Conduct a professional relationship with all 38 members of the Michigan Senate to ensure that their information needs are being met by the Agency.
4. Consistent with the needs of the Senate, approve, coordinate and direct assignments of all staff members.
5. Fulfill the statutory requirement as serving as the Senate representative on the Consensus Revenue Estimating Conference as created in Public Act 72 of 1991.
6. Assist the Chairperson of the Senate Appropriations Committee in establishing the agenda of and coordinating the meetings of the Senate Appropriations Committee.
7. Act as primary fiscal advisor to the Senate in terms of assistance in the implementation of the annual State budget.
8. Review correspondence as the Director considers necessary to ensure that all members of the staff are working toward common objectives in line with Agency policy.
9. Exercise final review, prior to release, of all reports prepared for issuance by the Agency.
10. Set schedules for production of and procedures for review of all bill analysis products.
11. In conjunction with the Clerk of the Senate Appropriations Committee, maintain files and information, including copies of all correspondence and meeting minutes, necessary for the efficient operation of the Senate Appropriations Committee and the Agency.
12. Maintain attendance records necessary for payroll, annual leave, and military leave purposes and all personnel-related materials.

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13. Advise the Governing Board of matters that, in the Director's opinion, are of consequence to the functioning of the office.
14. Issue all operational policies and procedures of the Agency.
15. Interact with members of the general public and the news media on all State fiscal issues.
16. Response to requests for outside speaking engagements concerning State fiscal issues.

SKILLS AND ABILITIES:

1. Must possess strong interpersonal, writing, speaking and managerial skills.
2. Must possess a complete understanding of all aspects of State fiscal policy.
3. Must possess a graduate-level degree in public policy, economics, business or other related field.
4. Must possess ability to work in a nonpartisan manner in a political environment.



**SENATE FISCAL AGENCY
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POSITION TITLE: Associate Director

IMMEDIATE SUPERVISOR: Director

SUMMARY: Associate Directors are responsible for all aspects of Unit operation. This includes monitoring the performance and work products of Fiscal Analysts and the Unit Assistant within the Unit to ensure timeliness, analytical integrity, and overall quality of written products and oral presentations.

Associate Directors are to carry out Agency policy as articulated by the Director and contained in Agency rules.

Associate Directors serve as advisor to the Director. This includes assisting in goal setting, planning, and identifying potential problems within and outside the Agency.

DUTIES AND RESPONSIBILITIES:

In addition to fulfilling the responsibilities of a Fiscal Analyst, the Associate Director is required to:

1. Monitor, review, and evaluate written work products of Fiscal Analysts including analyses of bills and administrative rules, memoranda, letters, and subcommittee decision documents.
2. Coordinate and monitor the Unit portion of all Agency-wide projects to ensure consistency, quality, and adherence to deadlines.
3. Evaluate the performance of analytical and clerical personnel within the Unit and make recommendations concerning merit pay to the Director.
4. Redistribute budget assignments of Fiscal Analysts in the event of an unplanned absence of a member of the Unit.
5. Provide training for new Fiscal Analysts in the Unit.
6. Interview and recommend to the Director potential candidates for employment in the Agency.
7. Monitor clerical workload and prioritize projects when necessary.
8. Monitor and make recommendations to the Director regarding annual leave and travel requests.
9. Attend weekly staff meetings and hold weekly Unit meetings to keep the Director and members of the Unit up-to-date on issues, projects and information pertaining to the Agency's work.

SKILLS AND ABILITIES:

1. In addition to the skills and abilities of a Fiscal Analyst, the Associate Director must exhibit strong management and supervisory skills.
2. Must possess the expertise and ability to evaluate the overall performance of the Fiscal Analysts in his/her Unit.
3. Knowledge of Agency rules, procedures, policies and responsibilities.

Note: This list is not intended to be exhaustive. Responsibilities and duties may change at the discretion of the Director of the Senate Fiscal Agency or his/her designee.

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POSITION TITLE: Associate Director/Bill Analysis Coordinator

IMMEDIATE SUPERVISOR: Director

SUMMARY: The Bill Analysis Coordinator is responsible for overseeing all aspects of bill analysis preparation to ensure timeliness, analytical integrity, and overall quality of bill analyses and other documents written by Legislative Analysts. This includes monitoring and evaluating the performance and work products of Legislative Analysts, as well as serving as a liaison between Legislative Analysts and the Director. The Bill Analysis Coordinator also is responsible for editing documents written by other Agency staff, as requested by the Director.

The Bill Analysis Coordinator is to carry out Agency policy as articulated by the Director and contained in Agency rules.

The Bill Analysis Coordinator serves as advisor to the Director. This includes assisting in goal setting, planning, and identifying potential problems within and outside the Agency, particularly in regard to the preparation of bill analyses.

DUTIES AND RESPONSIBILITIES:

1. Assign, monitor, and evaluate the responsibilities, work products, and performance of the Legislative Analysts and the Bill Analysis Assistant.
2. Edit all written work products of the Legislative Analysts, including bill analyses and summaries, issue papers, and memoranda.
3. Edit Fiscal Analysts' issue papers, fiscal impact statements, and, upon request, memoranda and other documents.
4. Edit Senate Fiscal Agency documents, such as the Appropriations Report and State Notes.
5. Assign bills to Fiscal Analysts.
6. Coordinate the completion and timeliness of bill analysis documents.
7. Perform the responsibilities of a Legislative Analyst as necessary.
8. Coordinate projects jointly performed by Legislative Analysts and Fiscal Analysts, as requested by the Director.
9. Interview and evaluate the writing assignments of applicants for a Legislative Analyst position, and recommend potential candidates to the Director.
10. Orient and train new Legislative Analysts.
11. Monitor and make recommendations to the Director regarding annual leave requests and travel requests of the Legislative Analysts and the Bill Analysis Assistant.

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12. Perform additional responsibilities assigned by the Director, including serving as Legal Counsel to the Agency if the Bill Analysis Coordinator is an attorney.

SKILLS AND ABILITIES:

1. In addition to the skills and abilities of a Legislative Analyst, the Bill Analysis Coordinator must possess strong management, supervisory, and editorial skills.

Note: This list is not intended to be exhaustive. Responsibilities and duties may change at the discretion of the Director of the Senate Fiscal Agency or his/her designee.

**SENATE FISCAL AGENCY
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POSITION TITLE: Chief Economist

IMMEDIATE SUPERVISOR: Director

SUMMARY: The Senate Fiscal Agency Chief Economist is responsible for detailed analysis and forecasts of the economy and the State budget. In addition, the Chief Economist provides fiscal analysis of taxation bills before the Senate Finance Committee. Finally, the Senate Fiscal Agency Chief Economist undertakes miscellaneous duties and projects determined to have merit and assigned by the Director of the Senate Fiscal Agency or his/her designee.

DUTIES AND RESPONSIBILITIES:

1. Prepare detailed economic forecasts for the State and National economy.
2. Provide the principal staff support for the Consensus Revenue Estimating Conference established pursuant to Public Act 72 of 1991.
3. Provide detailed revenue estimates and estimates of year-end State budget balances.
4. Analyze, make recommendations, answer questions, and prepare documents regarding State or Federal taxation issues.
5. Acquire a working knowledge of econometric modeling and forecasting techniques.
6. Maintain a current and up-to-date listing of key National and State economic and tax variables.
7. Review on a regular basis, reports of the Federal and State government, Federal Reserve publications, economic journals, university publications, and other reports concerning economic research.
8. Provide staff assistance to the Senate Finance Committee.
9. Testify before Senate/House Committees and Subcommittees regarding economic or tax issues.
10. Establish professional relationships with significant policy staff in the Executive Branch, House Fiscal Agency, and other State staff offices.
11. Serve on internal Senate Fiscal Agency committees.
12. Provide fiscal analyses for all assigned bills.

SKILLS AND ABILITIES:

1. Must possess a strong background in economic policy analysis.
2. Must possess the ability to communicate complicated and technical issues effectively, both orally and in writing.
3. Must exhibit the ability to use diplomacy, discretion, and good judgment in dealing with Senators, Legislative staff, Executive Agency Directors and staff, and members of the public and press.
4. Should have in-depth knowledge of the legislative process.
5. Must possess educational or practical experience in statistical analysis and interpretation.
6. Must display basic research, analytical and statistical skills as evidenced by a masters degree in economics or other comparable educational or practical experience.
7. Must have skill with computer equipment and software.

Note: This list is not intended to be exhaustive. Responsibilities and duties may change at the discretion of the Director of the Senate Fiscal Agency or his/her designee.

POSITION TITLE: Fiscal Analyst

IMMEDIATE SUPERVISOR: Associate Director

SUMMARY: Fiscal Analysts are responsible for the analysis, technical development, preparatory support, and presentation of an assigned budget area(s) to the Senate Appropriations Committee. In conjunction with this responsibility, a Fiscal Analyst will provide analysis of all Senate bills, House bills, and Administrative Rules which apply to the specific budget area(s) to which the analyst is assigned, design and conduct appropriate research relative to specific issues, and promptly complete related miscellaneous duties and projects determined to have merit and assigned by the Director of the Senate Fiscal Agency or his/her designee.

DUTIES AND RESPONSIBILITIES:

1. Become familiar with a specific budget area(s), State budgeting practices, and Senate and Agency policies and procedures.
2. Analyze, make recommendations, answer questions, and prepare documents regarding budget issues.
3. Prepare the fiscal analysis portion of the Agency's bill analysis documents for assigned legislative proposals before committees and the full Senate.
4. Testify before Senate committees and subcommittees regarding fiscal issues as requested.
5. Provide staff assistance to assigned Senate subcommittees.
6. Monitor changes in Federal-State and State-Local relations for fiscal and/or program implications in assigned budget areas.
7. Periodically update expenditure/revenue forecasts for specific budget areas throughout the fiscal year.
8. Develop appropriate data bases, including historical and comparative information for assigned budget areas.
9. Establish professional relationships with significant budget and policy staff in the Executive Branch, the House Fiscal Agency, other Senate staff offices, other government offices, and professional organizations.
10. Arrange and provide staff support for public hearings on behalf of members of the Appropriations Committee.
11. Design and conduct appropriation research and prepare concise reports on topical issues and their effect on State and local expenditures or revenue.
12. Serve on internal Senate Fiscal Agency committees.
13. Utilize available data processing systems when appropriate.

SKILLS AND ABILITIES:

1. Must possess the ability to communicate complicated and technical issues effectively, both orally and in writing.
2. Must exhibit the ability to use diplomacy, discretion, and good judgment in dealing with Senators, Legislative staff, Executive Agency Directors and staff, and members of the public and press.
3. Should have in-depth knowledge of the legislative process.
4. Must possess familiarity with basic budgeting skills.
5. Must display basic research, analytical and statistical skills as evidenced by a masters degree in public policy, economics, business or other related field.
6. Must have experience with electronic word processing, data processing, and personal computer equipment and software.

Note: This list is not intended to be exhaustive. Responsibilities and duties may change at the discretion of the Director of the Senate Fiscal Agency.



**SENATE FISCAL AGENCY
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POSITION TITLE: Legislative Analyst

IMMEDIATE SUPERVISOR: Associate Director/Bill Analysis Coordinator

SUMMARY: Legislative Analysts are responsible for writing summaries, analyses, and Public Act descriptions of bills referred to the Senate standing committees for which the analysts are responsible.

DUTIES AND RESPONSIBILITIES:

1. Write a summary of all Senate and House bills placed on the agenda for committees to which the analyst is assigned, and as otherwise assigned by the Associate Director.
2. Attend meetings and public hearings of Senate Committees to which the analyst is assigned.
3. Write the "CONTENT" section of the Floor Analysis of each Senate and House bill reported from a committee to which the analyst is assigned.
4. Write a detailed legislative analysis of each Senate and House bill reported from a committee for which the analyst is responsible.
5. Keep the Associate Director informed of the analyst's activities, and perform work according to the priorities established by the Associate Director.
6. Perform additional responsibilities assigned by the Associate Director or the Director, such as writing articles or issue papers, participating in staff meetings, and serving on internal Senate Fiscal Agency committees.

SKILLS AND ABILITIES:

1. Must possess excellent writing skills to communicate highly technical and complex issues to a broad audience on a broad range of issues.
2. Must be able to conduct research, and analyze and write under severe time constraints.
3. Must possess or develop a working knowledge of the legislative process.
4. Must possess at least a bachelor's degree.
5. Must use discretion and good judgment in presenting highly political issues in a neutral way.
6. Should possess skills with electronic word processing.

Note: This list is not intended to be exhaustive. Responsibilities and duties may change at the discretion of the Director of the Senate Fiscal Agency or his/her designee.

SENATE FISCAL AGENCY
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POSITION TITLE: Business Manager

IMMEDIATE SUPERVISOR: Director

SUMMARY: Responsible for all Agency accounting, human resource, procurement and other administrative functions as assigned by Director. Employee works within general methods and procedures and exercises considerable independent judgment to select proper courses of action.

DUTIES AND RESPONSIBILITIES:

1. Directs all payroll, bookkeeping, accounting, procurement, records management, equipment inventory, and property management functions of the Agency.
2. Develops budget recommendations and prepares Agency annual budget proposal.
3. Analyzes expenditure data, generates monthly financial reports and prepares quarterly expenditure projection data for Director.
4. Supervises Student Messengers. Assigns, coordinates and outlines the work methods of student messengers. Counsels employees and participates in the interviewing and selection process of job applicants.
5. Monitors on-going office service activities in order to anticipate and assess potential or emerging problem areas and develop appropriate responses.
6. Establishes and maintains effective relationships with other job similar government professionals and represents Agency management at meetings with administrative/financial State government officials.
7. Coordinates and prepares all Human Resource documentation in accordance with Agency and State of Michigan policies and procedures and maintains a thorough knowledge of data entry requirements as they relate to the State of Michigan Human Resource system. Prepares and maintains all personnel files, records and various reports.
8. Reviews the Agency's accounting needs each fiscal year and designs R*STARS (Relational Standard Accounting and Reporting System) accounting profiles that address those needs. R*STARS is the State of Michigan's budgetary control and financial reporting system. Coordinates all accounting and payment functions of the Agency as well as having a thorough knowledge of R*STARS data entry requirements. Establishes business office accounting procedures.
9. Designs ADPICS (Advanced Purchasing and Inventory Control System) approval path documentation and provides profile data entry. ADPICS is the State of Michigan's Procurement and Materials Management System and it is the software used to enter most payment vouchers into MAIN (Michigan Financial Information Network). Coordinates all procurement functions of the Agency as well as having a thorough knowledge of ADPICS data entry requirements.
10. Coordinates all insurance benefits of Agency personnel which includes maintaining a thorough knowledge of the SenFlex Flexible Benefits Plan. Prepares 10 biweekly financial spreadsheet reports for the Senate Finance Office listing employees, type of insurance/SenFlex coverage and applicable premium payments and/or deductions.
11. Composes and word processes replies to correspondence, independently or as assigned by Director.

12. Answers inquiries regarding Agency functions, rules, policies and procedures.
13. Reconciles travel expenses.
14. Establishes and designs forms for the efficient business operation of the Agency.
15. Prepares publications and establishes business office procedures -- Employee Handbook and Business Office Procedures.

KNOWLEDGE, SKILLS AND ABILITIES:

1. Considerable knowledge of the principles and techniques of financial management.
2. Thorough knowledge of rules, regulations, policies, procedures, precedents and terminology used in the work.
3. Thorough knowledge of the techniques of using reference materials and organizing data for preparing and using reports.
4. Thorough knowledge of the techniques of interviewing and of obtaining information.
5. Considerable knowledge of office management, including organization, work flow, forms, supplies, equipment and procedures relating to accounting, filing, record keeping, correspondence, mail and procurement.
6. Knowledge of State of Michigan accounting, purchasing and human resource systems and knowledge of the use of various software packages - spreadsheets, word processing and database applications.
7. Considerable knowledge of, and the ability to interpret, employee policies and procedures
8. Ability to communicate effectively with others, both verbally and in writing.
9. Knowledge of supervisory, training techniques and personnel practices.
10. Ability to use diplomacy, discretion, and judgment in giving out information.
11. Ability to formulate or plan methods to carry out new responsibilities assigned to the work area.
12. Ability to interpret and explain appropriate work instructions and guidelines to subordinate employees.

Note: This list is not intended to be exhaustive. Responsibilities and duties may change at the discretion of the Director of the Senate Fiscal Agency or his/her designee.



**SENATE FISCAL AGENCY
Job Description**

POSITION TITLE: Executive Assistant

IMMEDIATE SUPERVISOR: Director

SUMMARY: Responsible for all secretarial and reception duties associated with the office of the Director and Chief Economist of the Agency. Responsible for monitoring the workloads of the Bill Analysis Assistant and the Unit Assistants.

DUTIES AND RESPONSIBILITIES:

1. Performs accurate and timely word processing and proofreading of all reports, issue papers, tables, analyses, budget-related material, and correspondence for Director, Chief Economist, and other assigned analysts.
2. Records and publishes minutes of weekly Council meetings.
3. Composes routine correspondence for the Director's signature.
4. Assists Director and Chief Economist in producing monthly, quarterly, biannual, and annual reports.
5. Consolidates responses on Agency-wide work projects.
6. Monitors and coordinates workloads of the Bill Analysis Assistant and Unit Assistants.
7. Handles scheduling for the Director.
8. Maintains appropriate files, as required, including subcommittee meetings and attendance.
9. Prepares slide show presentations.
10. Assists management in designing, formatting, and editing for consistency in Agency products.
11. Performs other duties as assigned by Director.
12. Works overtime as required.

SKILLS AND ABILITIES:

1. Extensive word processing skills.
2. Working knowledge of Microsoft Office 2010, Adobe Acrobat, and Internet Explorer. Ability to convert documents into PDF format.
3. Knowledge of the organization, punctuation, and composition of business letters, reports, charts, and tabular material.
4. Knowledge of correct English usage, spelling, and punctuation.

5. Ability to prioritize workloads during stressful situations occurring as a result of short deadlines.
6. Ability to use diplomacy, discretion, and judgment in giving out information.
7. Ability to make decisions where precedents may not be established.
8. Serve on internal Senate Fiscal Agency committees.
9. A professional attitude in handling calls and visitors to the Director's office or his/her designee.

Note: This list is not intended to be exhaustive. Responsibilities and duties may change at the discretion of the Director of the Senate Fiscal Agency or his or her designee.

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POSITION TITLE: Bill Analysis Assistant

IMMEDIATE SUPERVISOR: Associate Director/Bill Analysis Coordinator

SUMMARY: Responsible for all secretarial duties for the Bill Analysis Unit including production, coordination, and distribution of bill analysis products. Acts as backup for Unit Assistants at the request of the Executive Administrator.

DUTIES AND RESPONSIBILITIES:

1. Performs accurate and timely word processing and proofreading of all analyses, Public Acts, Administrative Rules, Michigan Compiled Laws reference numbers, issue papers, reports, and correspondence for the Bill Analysis Unit.
2. Ensures that bill analyses are sent to the Senate Floor in time for session.
3. Maintains legislative and fiscal bill folders and records.
4. Responds to outside requests for analyses.
5. Assists management in designing, formatting, and editing for consistency in Agency products.
6. Performs other duties as assigned by the Bill Analysis Coordinator or the Executive Administrator.
7. Works overtime as required.

SKILLS AND ABILITIES:

1. Extensive word processing skills.
2. Working knowledge of Microsoft Office 2010, Adobe Acrobat, and Internet Explorer. Ability to convert documents into PDF format.
3. Knowledge of correct English usage, spelling, and punctuation.
4. Ability to prioritize workloads during stressful situations occurring as a result of short deadlines.
5. Ability to use diplomacy, discretion, and judgment in giving out information.
6. Serve on internal Senate Fiscal Agency committees.
7. A professional manner in handling calls and requests for bill analysis information.

Note: In addition to the above, the Bill Analysis Assistant also possesses the same qualifications as listed in the Unit Assistant Job Description. This list is not intended to be exhaustive. Responsibilities and duties may change at the discretion of the Director of the Senate Fiscal Agency, his or her designee, or the Associate Director/Bill Analysis Coordinator.

SENATE FISCAL AGENCY
Job Description



POSITION TITLE: Office Administrator

IMMEDIATE SUPERVISOR: Business Manager

SUMMARY: Responsible for telephone coverage, greeting visitors, and providing other clerical support.

DUTIES AND RESPONSIBILITIES:

1. Answers telephone; screens callers; provides information or refers callers to proper staff members; provides accurate message taking when needed; and reviews and distributes voice mail messages on a daily basis. Greets visitors and maintains Agency staff sign-out board.
2. Maintains Agency annual leave log and produces a daily leave/travel status report for the Agency's supervisory and support staff.
3. Manages inventory of and orders office supplies as needed.
4. Maintains and updates FoxPro mailing list database; Agency distribution lists; and processes requests for Agency publications.
5. Maintains Agency library which includes updating publication record log, cataloging, and filing Senate Appropriation Subcommittee hearing tapes.
6. Posts all Senate Standing Committee and Senate Appropriations Subcommittee hearings on wall calendar in the Reception area, distributes copies to appropriate staff and files notices in Reception desk hearings notebook.
7. Coordinates and prepares mailings for all Senate Appropriations Subcommittee notices and numerous Agency publications.
8. Sorts, opens, scans, and distributes incoming mail.
9. Sends and receives Agency facsimile documents.
10. Schedules use of main conference room.
11. Coordinates daily mail runs and provides telephone coverage training for Pages.

SKILLS AND ABILITIES:

1. Thorough knowledge of good telephone etiquette.
2. Ability to operate a multi-line, multi-functional telephone.
3. Ability to communicate oral and written messages clearly and concisely.
4. Ability to operate electronic word processing equipment.
5. Ability to use diplomacy, discretion, and judgment in handling calls and visitors.
6. Ability to maintain composure during stressful situations.

Note: This list is not intended to be exhaustive. Responsibilities and duties may change at the discretion of the Director of the Senate Fiscal Agency, his/her designee, or the Business Manager.

SENATE FISCAL AGENCY
Job Description



POSITION TITLE: Unit Assistant

IMMEDIATE SUPERVISOR: Associate Director

SUMMARY: Responsible for all secretarial duties for the assigned Unit consisting of the Associate Director and Fiscal Analysts. Acts as backup for other Unit Assistants and Bill Analysis Assistant at the request of the Executive Administrator. .

DUTIES AND RESPONSIBILITIES:

1. Performs accurate and timely word processing and proofreading of all reports, issue papers, tables, analyses, budget-related material, and correspondence for the assigned unit.
2. Prepares slide show presentations.
3. Maintains records of subcommittee meetings and attendance.
4. Assists management in designing, formatting, and editing for consistency in Agency products.
5. Performs other duties as assigned by Associate Director.
6. Works overtime as required.

SKILLS AND ABILITIES:

1. Extensive word processing skills.
2. Working knowledge of Microsoft Office 2010, Adobe Acrobat, and Internet Explorer. Ability to convert documents into PDF format.
3. Knowledge of the organization, punctuation, and composition of business letters, reports, charts, and tabular material.
4. Knowledge of correct English usage, spelling, and punctuation.
5. Ability to prioritize workloads during stressful situations occurring as a result of short deadlines.
6. Ability to use diplomacy, discretion, and judgment in giving out information.
7. Serve on internal Senate Fiscal Agency committees.

Note: In addition to the above, Unit Assistants also possess the same qualifications as listed in the Bill Analysis Assistant Job Description. This list is not intended to be exhaustive. Responsibilities and duties may change at the discretion of the Director of the Senate Fiscal Agency, his or her designee, or the Associate Director.