

1. Position Code

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

Federal privacy laws and/or state confidentiality requirements protect a portion of this information.

POSITION DESCRIPTION

This form is to be completed by the person that occupies the position being described and reviewed by the supervisor and appointing authority to ensure its accuracy. It is important that each of the parties sign and date the form. If the position is vacant, the supervisor and appointing authority should complete the form.

This form will serve as the official classification document of record for this position. Please take the time to complete this form as accurately as you can since the information in this form is used to determine the proper classification of the position. **THE SUPERVISOR AND/OR APPOINTING AUTHORITY SHOULD COMPLETE THIS PAGE.**

2. Employee's Name (Last, First, M.I.)	8. Department/Agency LEO – MSF – MEDC
3. Employee Identification Number	9. Bureau (Institution, Board, or Commission) Financial Services
4. Civil Service Classification of Position Financial Analyst-E	10. Division
5. Working Title of Position (What the agency titles the position) Procurement & Budget Analyst	11. Section
6. Name and Classification of Direct Supervisor BLACKMER, KRISTYN; NONSTATE SUPERVISOR	12. Unit
7. Name and Classification of Next Higher-Level Supervisor RETHAMEL, HANNAH; STATE DIVISION ADMINISTRATOR	13. Work Location (City and Address)/Hours of Work 300 N. Washington Square, Lansing, MI 48913 / M-F, 8am-5pm

14. General Summary of Function/Purpose of Position
The Procurement & Budget Analyst performs financial, procurement, and policy analysis in support of MEDC Financial Services, Budget & Purchasing unit. This position applies accounting, budgeting, and procurement principles to analyze purchasing activity, agency budgets, and financial data to support compliance, efficiency, and informed decision-making.
The position is responsible for supporting the administration of state and corporate purchasing processes by interpreting and applying state procurement rules, procurement policies, purchasing guidance, legal agreements, and system requirements. The analyst evaluates procurement and budget practices, identifies risks or inefficiencies, and provides analytical support and recommendations to internal procurement policies and procedural guidance.
In addition, the position collects, analyzes, and summarizes agency budget, expenditure, and purchasing data; prepares reports and explanations; and assists with programmatic financial reporting, tracking, and forecasting.

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

Duty 1

General Summary of Duty 1 **% of Time 50**

Review, prepare, and validate purchasing documents in SIGMA to ensure compliance with procurement policies, regulations, and internal controls.

Individual tasks related to the duty.

- Review and analyze purchasing cases in Salesforce by evaluating submitted documentation for compliance with procurement policies, funding requirements, and internal controls.
- Prepare, review, and validate procurement award documents in SIGMA, including analysis and updates to encumbrances and pre-encumbrances to ensure accurate financial tracking.
- Review and interpret legal agreements to extract and apply relevant financial, contractual, and compliance information within procurement documentation.
- Identify, research, and resolve discrepancies, coding errors, or incomplete information associated with procurement requests; escalate complex issues as appropriate.
- Participate in procurement meetings to provide analytical support, clarify requirements, and coordinate purchasing activities.
- Generate, review, and analyze procurement and financial reports to identify expired or at-risk documents and coordinate corrective actions with business units.
- Serve as initial point of contact to provide advisory support, guidance, and problem resolution related to procurement processes, policies, and system usage.
- Prepare and deliver procurement process training and reference materials, including guidance documents and instructional content, to support organizational compliance and consistency.
- Coordinate with Contract Services teams regarding year-end purchasing activities, expiring contracts, and communication with program staff on pending procurement actions.
- Review and update policies and procedures in collaboration with Strategic Planning to support alignment with organizational goals.
- Evaluate procurement policies and develop recommendations for updates or improvements; maintain published policy documentation.
- Review and analyze purchasing requests to assess allowability and appropriateness of expenditures based on applicable funding source requirements.
- Develop and maintain working knowledge of MEDC programs and strategic plan to ensure procurement activities align with programmatic and organizational objectives.

Duty 2

General Summary of Duty 2 **% of Time 20**

Provide financial analysis and support to the Strategy, Planning, & Results team by assisting with budgeting, reconciliation, financial reporting, and year-end close activities in accordance with accounting and budgetary requirements.

Individual tasks related to the duty.

- Compile, review, and analyze monthly budget-to-actual reports to validate accuracy, identify variances, and support reconciliation and reporting activities.
- Prepare and review pipeline reconciliation reports in accordance with established accounting and budget procedures to ensure accurate financial tracking.
- Assist with development of Chart of Accounts for the budget department by analyzing account structure and alignment with reporting requirements.
- Support Brownfield Receipts tracking by coordinating with the Brownfield team to generate and analyze reports, record receipts, evaluate partner allocations, and assess year-end accounts payable requirements.
- Assist with Spending Plan development and monitoring activities in Salesforce by analyzing spending data and maintaining accurate and timely updates.
- Serve as initial point of contact for staff regarding DTMB IT financial reporting and coding, including reviewing monthly IT invoices for accuracy and compliance with budget guidelines.

Duty 3

General Summary of Duty 3

% of Time 20

Provide financial and analytical support to the Asset Administration team for the Capital Access Program (CAP) and Loan Guarantee Program (LGP) in support of program compliance, reporting, and financial tracking.

Individual tasks related to the duty.

- Maintain and analyze bank records for Capital Access Program (CAP) and Loan Guarantee Program (LGP) awards and prepare financial and program reports to support asset tracking and oversight.
- Prepare and review reconciliation of bank account activity and balances to subsidiary ledger systems for CAP and LGP awards to ensure accuracy, completeness, and compliance with accounting requirements.
- Develop, run, and analyze queries from multiple databases and accounting systems to identify trends, variances, or emerging issues related to program performance and goals.
- Prepare and coordinate requests for asset and financial program information in support of year-end close activities and internal or external financial audits.
- Research and prepare responses to inquiries from management, program staff, and state or federal auditors by analyzing financial records, program data, and supporting documentation.

Duty 4

General Summary of Duty 4

% of Time 10

Other duties as assigned.

Individual tasks related to the duty.

- Develop and document unit processes and procedures.
- Perform other related duties as directed by supervisor.
- Provide guidance to business unit staff with financial needs, including referring to other staff and following up on task completion.
- Participate in Financial Services workgroups.

16. Describe the types of decisions you make independently in your position and tell who and/or what is affected by those decisions. Use additional sheets, if necessary.

Resolving day-to-day purchasing and budget issues.

Analyzing and making recommendations to processes and procedures.

Determine method and direction of research to identify and resolve errors.

Internal employees and external vendors may be affected by decisions.

Support of the CAP Program.

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

Denying or rejecting a purchasing request.

Proposed changes in policy.

18. What kind of physical effort do you use in your position? What environmental conditions are you physically exposed to in your position? Indicate the amount of time and intensity of each activity and condition. Refer to instructions on page 2.

Typical office environment, computer work, significant travel.

19. List the names and classification titles of classified employees whom you immediately supervise or oversee on a full-time, on-going basis. (If more than 10, list only classification titles and the number of employees in each classification.)

<u>NAME</u>	<u>CLASS TITLE</u>	<u>NAME</u>	<u>CLASS TITLE</u>

20. My responsibility for the above-listed employees includes the following (check as many as apply):

- | | |
|---|--|
| <input type="checkbox"/> Complete and sign service ratings. | <input type="checkbox"/> Assign work. |
| <input type="checkbox"/> Provide formal written counseling. | <input type="checkbox"/> Approve work. |
| <input type="checkbox"/> Approve leave requests. | <input type="checkbox"/> Review work. |
| <input type="checkbox"/> Approve time and attendance. | <input type="checkbox"/> Provide guidance on work methods. |
| <input type="checkbox"/> Orally reprimand. | <input type="checkbox"/> Train employees in the work. |

21. I certify that the above answers are my own and are accurate and complete.

Signature

Date

NOTE: Make a copy of this form for your records.

TO BE COMPLETED BY DIRECT SUPERVISOR

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

Yes

23. What are the essential duties of this position?

The Procurement & Budget Analyst is responsible for performing professional research, analysis, and administration duties in support of both state and MEDC corporate purchasing. This position will analyze, understand, and navigate state procurement rules, the MEDC procurement policy, purchasing guidance, legal agreements, system requirements, and more in order to evaluate and provide recommendations to internal procurement policies and direction to staff regarding procurement and budget procedures. In addition, this position supports Support Strategy, Planning and Results staff, and the CAP Program, and assists with programmatic reporting and tracking.

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

New position

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

Financial Services is responsible for the accounting, budgeting and monitoring, and procurement functions for MEDC/MSF. The Budget & Procurement Section is responsible for planning and budget monitoring for the organization, ensuring compliance with annual spending plans, verifying timely payments, assisting with development of strategic measurement initiatives in correlation with available funding, correcting inaccurate transactions, accurately reporting information at the program, department, state and federal level and more. This position serves as a budget and procurement analyst responsible for professional research, analysis, and administration duties in support of MEDC/MSF budget and procurement activities. This position will be responsible for the administration of both state and MEDC corporate purchasing, as well as supporting the budget team with fiscal/budget related tasks.

26. In your opinion, what are the minimum education and experience qualifications needed to perform the essential functions of this position.

EDUCATION:

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

EXPERIENCE:

Financial Analyst 9

No specific type or amount is required.

Financial Analyst 10

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

Financial Analyst P11

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

KNOWLEDGE, SKILLS, AND ABILITIES:

- Strong attention to detail.
- Some knowledge of generally accepted accounting principles, practices, and terminology, and governmental accounting principles and procedures.
- Familiarity with State of Michigan accounting policies and procedures is desirable.
- Ability to collect, organize and analyze data.
- Some knowledge of SIGMA accounting system is desirable.
- Ability to work independently and work on several tasks at once and meet deadlines.
- Ability and willingness to cooperate in working with others.
- Ability to apply criteria and make recommendations.
- Strong written and verbal communication.

CERTIFICATES, LICENSES, REGISTRATIONS:

N/A

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

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

Supervisor's Signature

Date

TO BE FILLED OUT BY APPOINTING AUTHORITY

28. Indicate any exceptions or additions to the statements of the employee(s) or supervisor.

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

Appointing Authority's Signature

Date