

**WISCONSIN DEPARTMENT OF ADMINISTRATION**  
Division of Energy, Housing, and Community Resources

**PROGRAM & PLANNING ANALYST- ADVANCED**  
**Financial Operations**

**POSITION SUMMARY**

Under the general supervision of the Program Services Chief, this position is responsible for significant technical and administrative program planning, contract management, and policy development for Division of Energy, Housing, and Community Resources (DEHCR) programs. This position administers and manages the financial operations of the Divisions' grant programs by analyzing data pertaining to areas including, but not limited to: determining program funding availability; developing contracts and local grantee funding allocations, establishing contract goals, providing technical fiscal assistance to grantees and outside sources; interaction with federal grant agencies; completion of federal grant applications; and, report review and completion. Additionally, this position develops grantee contract conditions and is responsible for monitoring grantee fiscal performance, including grantee expenditures and production. Funding sources include state public benefit funds, federal block grants, formulary grants, and competitive grants. This position will monitor funding from sources to enable program flexibility and review/monitor sub grantee and administrative expenditures to ensure compliance with funding source requirements.

**TIME %      GOALS AND WORKER ACTIVITIES**

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- A      35%      Participate in the Development and Coordination of Grant Award Materials for the DEHCR Programs**
- A1.      Lead Research and analysis of program requirements related to funding for grantees.
- A2.      Lead the analysis, development and determination of program funding availability for DEHCR programs determining annual funding allocations for distribution to local grantees. Identify trends and fluctuations in grantee expenditures being mindful of federal and state rules, regulations and laws pertaining to the use of specific funds.
- A3.      Oversee submittal/review of local grantee contract production plans. Consult with division management on approval of local grantee production plans. Monitor agency performance of actual production against approved production plan on a monthly and contract-to-date basis.

- A4. Lead the analysis, development, and determination of allocation of Division program funds. Make recommendations in timing allocation of resources and activities as appropriate.
- A5. Analyze and assist in developing the fiscal portion of the Division's federal grant applications. Review, analyze and project the amount of unspent funds to be carried over into the new grant/contract year.
- A6. Provide input on development of the timetable to meet the grant application deadlines. Apply grant evaluation and selection criteria, grant application revisions, and discuss program goals with fiscal staff and Division management.
- A7. Monitor fund accounts and advise management and staff of reported interest and balances.
- A8. Monitor budgets are accurate and reflective of federal and state awards ensuring correct coding for funding sources and allocation of funds are within the authorized budget levels and in accordance with legislative intent, federal award, consolidated and annual plans.

**B 30% Provide Assistance to Grantees and Outside Sources**

- B1. Prepare contracts between the Division and grantees.
- B2. Respond to grantee inquiries relating to fiscal program matters including monthly invoice expenses, contracts, payments, electronic fund transfer, etc.
- B3. In conjunction with Division Budget Analyst act as lead liaison with agencies and organizations providing technical contract management and fiscal assistance. In coordination with financial management staff, prepare fiscal responses to outside inquiries such as the Legislative Fiscal Bureau or legislators.
- B4. Prepare purchase requisitions and purchase orders.
- B5. Process payment requests and monitor for timeliness of payments.

**C 15% Fiscal and Budget Oversight for the Division's Home Energy Plus Programs**

- C1. In conjunction with the Division Budget Analyst and DOAS, lead monitoring of local grantee financial and program audits affecting Division programs and assure timeliness of resolutions.
- C2. In conjunction with the Division Budget Analyst, review and reconcile program expenditures, and close-out contract cycles. Develop methodologies and tools as needed to ensure submittal of accurate reconciliation reports from local grantees.

Identify compliance and/or program issues. Inform division management of any issues identified with recommendations for timely resolution.

- C3. In conjunction with the Division Budget Analyst review operation manual language relating to new or revised financial and reporting procedures and propose modifications to Division management as required.
- C4. In conjunction with the Division Budget Analyst review and analyze budgets for appropriate charges and expenditure patterns using the State's accounting systems.
- C5. In conjunction with the Division Budget Analyst recommend resolution of fiscal and budgetary concerns to Division management and DOA accounting staff.
- C6. Assist in establishing the annual monthly Public Benefits charge. Receive and review annual utility collection plans.
- C7. Work with investor owned utilities, electric cooperatives, and municipal electric utilities in the collection of low income Public Benefits funds.

**D 15% Analysis and Generation of Reports**

- D1. Review, design and analyze financial reports utilizing internal and external automated accounting systems. Monitor expenditures for appropriateness and conformity with federal and state regulations.
- D2. Develop and manage the overall allocation process utilizing spreadsheets and budgets.
- D3. Participate in the review and resolution of issues in the Low Income Weatherization Program Closeout Reports. Identify compliance and/or program issues informing management of problems and/or issues.
- D4. Prepare the US Department of Energy quarterly and annual reports generating the production and financial information. Enter information into the US DOE electronic reporting system.

**E 5% Miscellaneous**

- E1. Work closely with system development staff involving the WisWAP and WHEAP Programs recommending system redesign as fiscal and program requirements change, or with recommendations of system enhancements to improve overall program financial integrity.
- E2. Participate in management meetings on matters of administration, program development, grant and fiscal management policy, and general Bureau or Division operating procedures, as required.

E3. Other duties as assigned.

### **KNOWLEDGE, SKILLS AND ABILITIES**

1. Knowledge of Generally Accepted Accounting Principles (GAAP)
2. Knowledge of STAR
3. Knowledge of Home Energy Plus Programs including the Low Income Home Energy Assistance Program (LIHEAP), the Low Income Weatherization Program and State Public Benefits Program.
4. Knowledge of programs funded by the U.S. Department of Housing and Urban Development.
5. Ability to interpret complex federal and state rules and regulations related to grant management.
6. Knowledge of contract development, negotiation, state procurement policies and grants management techniques.
7. Knowledge of grants administration including program management, procedures and techniques.
8. Knowledge of program planning, evaluation techniques, and policy analysis.
9. Knowledge of Federal regulatory, legislative, and budgetary procedures.
10. Knowledge of County Government, non-profit entities and community agency structure.
11. Ability to work in a fast-paced environment with a high level of ambiguity.
12. Ability to effectively communicate ideas and concepts both verbally and in writing.
13. Ability to effectively train others in the technical aspects of managing grants.
14. Decision making, analytical, and problem solving skills.
15. Excellent organizational and recordkeeping skills.
16. Interpersonal skills and ability to work in a team environment.
17. Skill in the use of Microsoft Office Products, including Microsoft Word, Excel, Access, Project, and PowerPoint software.