

WINNEBAGO COUNTY
ARPA Strategy and Outcomes Commission
Minutes

DATE: Friday, May 3, 2023

TIME: 1:00 p.m.

PLACE: Winnebago County Sheriff's Office
Richard Meyer Community Resource Room
4311 Jackson Street
Oshkosh, WI 54901

PRESENT: Co-Chair Tom Egan, County Board Chairman
Co-Chair Jon Doemel, County Executive
Morris Cox, Personnel and Finance Chair
Chuck Farrey, County Board Vice-chair
Tom Borchart, County Board Member
Andy Buck, County Board Member
Tom Belter, Public Member
Beth Oswald, Public Member
Paul Kaiser, Director of Finance (non-voting member)

EXCUSED: Tim Galloway, Public Member

ALSO PRESENT:	Ethan Hollenberger, County Executive Assistant	Doug Gieryn (via Zoom)
	Cassie Smith-Gregor, Deputy County Clerk	Heidi Keating (via Zoom)
	Mary Anne Mueller, Corporation Counsel	Ellen Skerke (via Zoom)
	Andrew Kaspar, Corporation Counsel	Supervisor Rebecca Nichols
	Lara Vendola, Sheriff's Office	(via Zoom)
	Dustin Heideman, Sheriff's Office	Bob Schmeichel (via Zoom)
	Tony Daley – Journalist	

Co-Chair Jon Doemel called the meeting to order at 1:13 p.m.

1. Public Comments

Supervisor Rebecca Nichols, Menasha, Wisconsin, spoke regarding agenda item 5, "Discuss/Action on Resolution Approving \$150,000 from the Spirit Fund to be Used to improve Meeting Room Virtual Capabilities and other Technology Upgrades to Support Higher Quality Streaming with Paperless Agenda Packet Options". The County Department of Administration is a newly created department that has already added two members/staff to it over the last two years. And already from the ARPA funds, about \$500,000 have been allocated to this office, to this department through the strategic plan and priority budgeting initiative and the facilities evaluation that is happening. The challenges that face Winnebago County aren't much different than those around us, they include childcare, housing, work force challenges, mental health care and our county nursing homes, which have been devastated by Covid and continue to struggle to this day. Supervisor Rebecca Nichols would like the commission to consider that and in the coming weeks and months lead the conversation into how the county can get this money out to our community and working for our citizens.

Supervisor Andy Buck asked and it was confirmed with Executive Doemel that the 33 million in ARPA funds is in our bank account. Supervisor Buck wanted to notify and make the commission aware that there has been talk about some ARPA fund clawbacks taking place.

Paul Kaiser responded from what he understands is that the clawbacks are for ARPA funds that have not already been spent or have been encumbered. All Winnebago County ARPA funds have been spent so legally they should not be able to clawback any funds from Winnebago County.

2. Approval of 4/14/2023 meeting minutes.

Motion by Farrey, seconded by Cox to approve the 04/14/2023 meeting minutes. CARRIED BY VOICE VOTE.

3. Updates on County Government Projects on the Spirit Fund Planning Document

The County Board passed an amended Resolution 167-022823 which removed the third category,

25% of funds for non-governmental community projects and added that percentage of funds to the category, County Government Projects. Executive Doemel provided a new planning document to the commission that he would like to propose. Some items haven't changed, some have already been allocated, and some have already gone through. Doemel discussed and updated the commission on the items and projects that are listed on this planning document which are just recommendations. Any of these projects would have to be approved by this commission and then the County Board.

Motion made by Belter, seconded by Farrey to move agenda item #6 as the next item up to discuss. CARRIED BY VOICE VOTE.

6. Discuss/Action on request for funding proposals in the Government Identified Community Projects Category

Motion made by Farrey, seconded by Buck to amend the "Spirit Fund Project Funding Opportunities" document; remove and replace verbiage on the second and third paragraphs. Remove "Grants" and replace with "Awards" in title; remove "grant" and replace with "project"; and strike out "40%" and replace with "50%". Should state, "**Minimum and Maximum Grants Awards**: For planning purposes, a minimum ~~grant~~ **project** award is \$50,000 with a maximum ~~grant~~ **project** award of \$500,000. The commission upon review may choose to increase the maximum awards. Proposals seeking more than \$500,000 should include a section on why more funding is needed.

Match Dollars: Matching funds are required. No ~~grant~~ **award** may exceed ~~40%~~ **50%** of the total project cost. Other government funds are eligible for match. All government funds should not exceed 75% of the total project unless the proposal is for a government project. Private and foundation matching dollars are preferred." CARRIED BY VOICE VOTE.

Motion made by Doemel, seconded by Cox to amend the "Spirit Fund Project Funding Opportunities" document and add a section on project completion. Add, "**Project Completion: It is expected that all projects which receive awards are completed by December of 2026**". CARRIED BY VOICE VOTE.

Motion by Doemel, seconded by Farrey to approve the document as amended. AYES: 8; NAYS: 0; ABSTAIN: 0; ABSENT: 1 – Galloway. MOTION PASSED 8-0.

Motion by Belter, seconded by Buck to appoint Beth Oswald (citizen member) as the Chairman of the Review and Scoring committee. CARRIED BY VOICE VOTE.

4. Discuss/Action on Resolution Approving \$150,000 from the Spirit Fund to be Used to improve Meeting Room Virtual Capabilities and other Technology Upgrades to Support Higher Quality Streaming with Paperless Agenda Packet Options

Motion by Farrey, seconded by Egan to approve resolution and forward to the County Board. CARRIED BY VOICE VOTE.

5. Discuss/Action on Resolution to Allow for Deviation in Spirit Fund Category Requests for Innovation and to Create a Sunsetting Innovation Analyst Position within the County Department of Administration

Motion by Farrey, seconded by Doemel to approve resolution and forward to the Personnel & Finance Committee. AYES: 6; NAYS: 0; ABSTAIN: 2 – Cox and Borchart; ABSENT: 1 – Galloway. MOTION PASSED 6-2.

Co-Chair Egan asked Ethan Hollenberger when the appropriated funds for municipalities and towns would receive their funds? The County Board approved the resolution to fund \$145,000 for each municipality and town primarily located within Winnebago County on March 21, 2023. Ethan Hollenberger stated that the towns will receive an agreement document that the commission approved within a week or two. Mr. Hollenberger will also meet with Paul Kaiser and Michael Collard to be sure the municipalities and towns are in compliance and get those funds disbursed.

7. Set next meeting date and time.

The next meeting date will be Thursday, June 29, 2023 at 1:00 p.m. at the Winnebago County Sheriff's Office, Richard Meyer Community Resource Room.

8. Adjournment.

Motion made by Buck, seconded by Farrey to adjourn at 3:30 p.m. MOTION CARRIES.

Submitted by:
Cassie Smith-Gregor
Winnebago County Deputy Clerk

Agenda Item Report



Winnebago County
The Wave of the Future

DATE: April 26, 2023

FROM: County Executive Jon Doemel

RE: Resolution to Allow for Deviation in Spirit Fund Category Requests for Innovation and to Create a Sunsetting Innovation Analyst Position within the County Department of Administration

General Description:

Approval of a deviation of up to 10% of the total Spirit Funds to allow for innovation and to create a sunsetting innovation analyst position within the county Department of Administration.

Action Requested:

Motion to Recommend Passage of the Resolution.

Procedural Steps:

Committee of Jurisdiction: ARPA Strategy & Outcomes Commission Meeting date: May 4, 2023

Action taken: _____ Vote: _____

County Board

Meeting date: May 16, 2023

Background:

Winnebago County has appropriated about 30% of its Spirit Fund allocation. Most of the funds have gone to subscriber radios, land & water conservation, and allocations to local governments. Other funds have gone to increase resiliency at the Sunnyview Expo Center and begin to plan for the future with Priority Based Budgeting and a Facilities Condition Assessment.

Additionally, the county has accepted \$10.3 million in Neighborhood Investment Funds to five sub-recipients and a county pilot project. The local government allocation increased the number of sub-recipients to 26. With a project to review community projects looming.

The American Rescue Plan Act is just one of several federal pieces of legislation directly sending money to the county. Every couple of weeks the county is receiving notifications from the National Association of Counties about direct funding opportunities from the Bipartisan Infrastructure Law, Inflation Reduction Act, federal budget, and others. Additionally, the county is eligible for competitive grants, yet lacks the staff to quickly apply for these funds which could fix our roads, improve our economic development efforts, and invest in our community.

The Wisconsin State Legislature and Governor Evers are in the final stages of negotiating significant structural changes to Wisconsin's shared revenue allocations for local governments. Part of that package will be an "Innovation Fund" for payments to local governments as an incentive to consolidate services.

Many of our towns and small municipalities lack the staff and expertise to go after these funds. The county is not equipped with an analyst to go after these funds.

Frequently, board members have requested a grant coordinator position in the county. Additionally, for decades, the county board has reviewed and commissioned studies to make our government more

efficient. The reality is those reports have wasted tens of thousands of dollars, countless hours of staff time, and sit collecting dust.

As recently as 2007, the county board passed Resolution 320-112007 asking for efficiency, consolidation, and cost savings recommendations to be implemented. Due to ambivalence and the lack of resources, many of the recommendations remain unchanged.

It is commonplace in local government and business to have management and innovation analysts to do the research and reporting on the viability of projects. Typically, these are individuals who have pursued public administration or data analyst degrees.

Policy Discussion:

Without dipping into our Spirit Fund allocation, we propose to use the interest earned on unspent Spirit Fund dollars to hire a sunseting position to ensure the adequate and smart spending of our funds. We can work use better analysis and research to fully implement the planning documents we are creating including Priority Based Budgeting, Facilities Condition Assessment, and Strategic Plan. Winnebago County cannot afford not to fully implement these projects. Additionally, this position would work to analyze ways to stretch the funds further through other funding opportunities.

For example, the Bipartisan Infrastructure Law has grants specifically for multi-use trails, bridges and fixed spans, and road improvements. The county could plan to use some level of Spirit Fund dollars for the local match.

With more capacity on the research side, we can look at more projects to improve our county including:

- The 2007 board approved list in Resolution 320-112007
- Space and Use Assessment for County Owned Facilities
- Master Planning of County Owned Property
- Combined Services with other governments to apply for state Innovation Fund dollars
- County Small-Vehicle Fleet Vehicle Management
- Paperless initiatives across the county
- Department Interfund Charges to adequately realize costs
- Grant and Revenue Optimization
- Highway Department Equipment and Fixed Asset Replacement Schedule and Funding
- Smart and cost-effective energy efficiency
- Electronic and mobile job applications and recruiting
- Economic Development and Brownfield Revolving Loan Funds
- Regionalization to impact our quality of life
- Property Tax Rate reduction plan
- Review of the dependence on Bonding and debt levy for the CIP
- Park View Financial Stability and Feasibility
- Program cost recoupment for non-mandated service
- Long term fiscal stability of the parks and Sunnyview Expo Center
- Employee recruiting, retention, and training best practices
- County waste reduction and recycling
- Use of technology for efficiency

The projects above are in addition to our already numerous projects which include county general code recodification and review, strategic plan, priority-based budgeting, migration to Microsoft 365, Facilities

Condition Assessment and deferred maintenance review, merit pay and benefits review, and day-to-day operations of the county. Many of these projects are ambitious and require more implementation time.

We would accomplish a lot more than we can now by the end of 2026, if we had a budget, analytics, and policy researcher ready to take the lead on projects to move the county into the future. There would be no cost on the levy, long term budget impact, and we would not be dipping into the Spirit Fund core investment.

The county board will see better cost benefit analysis on policy items. We would also be able to review multiple options to check the best fit and most cost-effective measure. The board will see reviews of our current processes and procedures to make government more responsive to our citizens and our other government partners.

Other counties have realized success by creating robust research and analytics positions such as Racine, Waukesha, Milwaukee, Dane, and Washington Counties.

This proposal complies with the Framework of Spirit Fund Spending adopted by the ARPA Strategy and Outcomes Commission because it is planned one-time-funds, enhance other funding opportunities, will assist in reviewing how to avoid debt and will work on sustainability planning through efficiency, consolidation, and reform.

Winnebago County can live up to its motto "Wave of the Future" with a dedicated innovation analyst.

Attachments:

Draft Resolution w/ fiscal note

Resolution 320-112007

1 - 2023

2

3 **RESOLUTION: To Create a Sunsetting Innovation Analyst Position within the Winnebago County**
4 **Department of Administration**

5

6 **TO THE WINNEBAGO COUNTY BOARD OF SUPERVISORS:**

7 **WHEREAS**, at the March 2023 County Board Meeting, the Winnebago County Board of Supervisors created
8 the Spirit Fund split evenly between two categories: County Government Projects and Government Identified
9 Community Projects; and

10 **WHEREAS**, Congress has authorized several pieces of legislation including the American Rescue Plan Act
11 (ARPA), the Bipartisan Infrastructure Law (BIL), Inflation Reduction Act (IRA), and the federal budget, which allows
12 for counties to receive grants and allocations directly or through competitive grants; and

13 **WHEREAS**, numerous grant and allocation opportunities require increased compliance, forms, and review by
14 current staff. Adding resources will allow for more grant opportunities to come to Winnebago County; and

15 **WHEREAS**, the Governor and Wisconsin State Legislature are in final talks to reform local government
16 shared revenue aids and will likely create an "Innovation Fund". It is critical for Winnebago County to create an
17 apparatus to review the new anticipated revenues and potential innovation grants through consolidation; and

18 **WHEREAS**, many of Winnebago County's towns and small municipalities lack staff and resources to pursue the
19 countless funding opportunities including innovation planning grants which are part of the Wisconsin legislation proposal;
20 and

21 **WHEREAS**, budget, management, policy, and research analysts are common place in local governments to
22 ensure sound recommendations backed up with data – yet Winnebago County does not have such a position; and

23 **WHEREAS**, the ARPA Strategy and Outcomes Commission and County Board have allocated resources to
24 projects and municipalities which need to be expeditiously, judiciously, and professionally executed; and

25 **WHEREAS**, the Winnebago County Board has attempted to reform county government through numerous
26 studies, most recently in 2007 with Resolution 320-112007, only to collect dust due to ambivalence and lack of resources
27 allocated to achieve the goals desired. This in turn has resulted in the waste of tens of thousands of dollars in financial
28 and time resources.

29

30 **NOW, THEREFORE, BE IT RESOLVED** by the Winnebago County Board of Supervisors that an Innovation
31 Analyst position is created on the Table of Organization for the Department of Administration with a budget transfer in
32 the 2023 Annual Budget in the amount of \$64,000, from the Spirit Fund to the Department of Administration's labor
33 account and \$1,500 in the department's small equipment technology account, with an additional \$365,000 from
34 interest proceeds reserved in the Spirit Fund for future budgets.

35

36 **BE IT FURTHER RESOLVED** by the Winnebago County Board of Supervisors that the Innovation Analyst
37 position shall sunset off the Table of Organization on December 31, 2026, unless extended by the Winnebago
38 County Board of Supervisors through the 2027 Annual Budget or Resolution.

39

40 **BE IT FURTHER RESOLVED** by the Winnebago County Board of Supervisors that the Innovation Analyst
41 position will perform the following tasks:

- 42 (1) Advising and supporting the ARPA Strategy and Outcomes Commission on its allocation requests
43 (2) Ensuring expeditious completion and compliance with Spirit Fund expenditures approved by the Winnebago
44 County Board of Supervisors
45 (3) Maintaining and improving the Spirit Fund dashboard required for all Spirit Fund Spending
46 (4) Providing research and analytics on budget and policy reform to create internal efficiencies and reallocation
47 of taxpayer resources, especially on projects which qualify for Innovation Grants from the State of Wisconsin
48 (5) Working to identify and complete funding opportunity requests available to Winnebago County
49 (6) Supporting the Director of Administration and County Executive in special project management and analytics
50 for Winnebago County departments

51
52 Fiscal Note: *This resolution will appropriate \$65,500 this year in labor and technology costs for the new position from*
53 *interest earnings on the Spirit Fund. Additionally, \$365,000 will be reserved for labor costs in the 2024, 2025, and*
54 *2026 Annual Budgets, all from Spirit Fund interest proceeds. This will not impact the base allocation in the Spirit*
55 *Fund.*

56 Respectfully submitted by:

57 **ARPA STRATEGY AND OUTCOMES COMMISSION**

58 Committee Vote: 6-0 (Cox & Borchardt abstain)

59
60
61 **PERSONNEL & FINANCE COMMITTEE**

62 Committee Vote:

63 Vote Required for Passage: **Two-Thirds of Membership**

64
65 Approved by the Winnebago County Executive this ____ day of _____, 2023.

66
67 _____
68 Jonathan D. Doemel
69 Winnebago County Executive

1 - 2023

2

3 **RESOLUTION: To Allow for Deviation of up to 10 percent of the total Spirit Fund into either Spirit Fund**
4 **Category for Innovation and to Create a Sunsetting Innovation Analyst Position within the**
5 **Winnebago County Department of Administration**

6

7 **TO THE WINNEBAGO COUNTY BOARD OF SUPERVISORS:**

8 **WHEREAS**, at the March 2023 County Board Meeting, the Winnebago County Board of Supervisors created
9 the Spirit Fund split evenly between two categories: County Government Projects and Government Identified
10 Community Projects; and

11 **WHEREAS**, the ARPA Strategy and Outcomes Commission desires to allow for some deviation in its
12 requests to the board to permit flexibility in planning of Spirit Fund dollars to allow for innovation investment in either
13 of the two categories; and

14 **WHEREAS**, Congress has authorized several pieces of legislation including the American Rescue Plan Act
15 (ARPA), the Bipartisan Infrastructure Law (BIL), Inflation Reduction Act (IRA), and the federal budget, which allows
16 for counties to receive grants and allocations directly or through competitive grants; and

17 **WHEREAS**, numerous grant and allocation opportunities require increased compliance, forms, and review by
18 current staff. Adding resources will allow for more grant opportunities to come to Winnebago County; and

19 **WHEREAS**, the Governor and Wisconsin State Legislature are in final talks to reform local government
20 shared revenue aids and will likely create an "Innovation Fund". It is critical for Winnebago County to create an
21 apparatus to review the new anticipated revenues and potential innovation grants through consolidation; and

22 **WHEREAS**, many of Winnebago County's towns and small municipalities lack staff and resources to pursue the
23 countless funding opportunities including innovation planning grants which are part of the Wisconsin legislation proposal;
24 and

25 **WHEREAS**, budget, management, policy, and research analysts are common place in local governments to
26 ensure sound recommendations backed up with data – yet Winnebago County does not have such a position; and

27 **WHEREAS**, the ARPA Strategy and Outcomes Commission and County Board have allocated resources to
28 projects and municipalities which need to be expeditiously, judiciously, and professionally executed; and

29 **WHEREAS**, the Winnebago County Board has attempted to reform county government through numerous
30 studies, most recently in 2007 with Resolution 320-112007, only to collect dust due to ambivalence and lack of resources
31 allocated to achieve the goals desired. This in turn has resulted in the waste of tens of thousands of dollars in financial
32 and time resources.

33

34 **NOW, THEREFORE, BE IT RESOLVED** by the Winnebago County Board of Supervisors that it supports the
35 ARPA Strategy and Outcomes Commission request to submit projects with a deviation of up to 10% of the total Spirit
36 Fund into either Spirit Fund category which shall follow the spending framework document created by the
37 commission.

38

39 **BE IT FURTHER RESOLVED** by the Winnebago County Board of Supervisors that an Innovation Analyst
40 position is created on the Table of Organization for the Department of Administration with a budget transfer in the
41 2023 Annual Budget in the amount of \$64,000, from the Spirit Fund to the Department of Administration's labor

42 account and \$1,500 in the department's small equipment technology account, with an additional \$365,000 from
43 interest proceeds reserved in the Spirit Fund for future budgets.

44

45 **BE IT FURTHER RESOLVED** by the Winnebago County Board of Supervisors that the Innovation Analyst
46 position shall sunset off the Table of Organization on December 31, 2026, unless extended by the Winnebago
47 County Board of Supervisors through the 2027 Annual Budget or Resolution.

48

49 **BE IT FURTHER RESOLVED** by the Winnebago County Board of Supervisors that the Innovation Analyst
50 position will perform the following tasks:

- 51 (1) Advising and supporting the ARPA Strategy and Outcomes Commission on its allocation requests
52 (2) Ensuring expeditious completion and compliance with Spirit Fund expenditures approved by the Winnebago
53 County Board of Supervisors
54 (3) Maintaining and improving the Spirit Fund dashboard required for all Spirit Fund Spending
55 (4) Providing research and analytics on budget and policy reform to create internal efficiencies and reallocation
56 of taxpayer resources, especially on projects which qualify for Innovation Grants from the State of Wisconsin
57 (5) Working to identify and complete funding opportunity requests available to Winnebago County
58 (6) Supporting the Director of Administration and County Executive in special project management and analytics
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62 *interest earnings on the Spirit Fund. Additionally, \$365,000 will be reserved for labor costs in the 2024, 2025, and*
63 *2026 Annual Budgets, all from Spirit Fund interest proceeds. This will not impact the base allocation in the Spirit*
64 *Fund.*

65

Respectfully submitted by:

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ARPA STRATEGY AND OUTCOMES COMMISSION

67 Committee Vote: _____

68

69 Vote Required for Passage: **Two-Thirds of Membership**

70

71 Approved by the Winnebago County Executive this _____ day of _____, 2023.

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75

Jonathan D. Doemel
Winnebago County Executive



Winnebago County
Department of Human Resources
The Wave of the Future

June 23, 2023

To: The ARPA Strategy and Outcomes Commission
From: Mark Habeck, Director of Human Resources *meH*
Subject: Innovation Analyst position

Recently, you had discussion on a new position request for the Department of Administration. This Innovation Analyst would be graded in the compensation plan at grade 67, which is consistent with other project coordinator positions in our pay plan. It also is comparable for other positions in our state. This would result in a budget transfer necessary of \$65,500 for the last seven months of this year and a total of \$365,000 for the duration of the sunsetting position. When calculating these numbers, I had assumed a May board passage.

Further, I reviewed the U.S. Bureau of Labor Statistics (BLS) Occupational Outlook Handbook for Management Analysts and Budget Analysts.

Lastly, I used the following job duties and requirements, which could appear in a Winnebago County job description for scoring. Generally, I used a bachelor's degree or experience equivalent, with master's degree preferred.

From the BLS:

- Gather and organize information about the problems to be solved or the procedures to be improved
- Interview personnel and conduct onsite observations to determine the methods, equipment, and personnel that will be needed
- Analyze financial and other data, including revenue, expenditure, and employment reports
- Develop solutions or alternative practices
- Recommend new systems, procedures, or organizational changes
- Make recommendations to management through presentations or written reports

- Confer with managers to ensure changes are working

From comparable job descriptions:

- Assists and supports the development of the county budget document and policies. Also assists and supports the management of county budget systems, including Priority Based Budgeting, capital improvement planning, and forecasting.
- Participates in cross-departmental work teams for special projects and initiatives, to facilitate changes and improvements to county policy, procedures, and operations.
- Designs and utilizes research instruments and procedures; compiles the results and evaluates program and service needs; identifies data quality issues and recommends changes for improvement.
- Serves as a resource person to county staff and other partners by providing applicable data for decision making and improve programming.
- Researches, analyzes, reviews, evaluates, and interprets legislation, court decisions, regulations, trends and variances - and provides input to ensure compliance, efficiency, and /or relevant programming.
- Works with other departments to ensure cross functional collaboration and information sharing.
- Utilizes data to answer strategic questions and support recommendations for service or programs modification.
- May assist in identifying funding sources and writing/data collection for grant applications.

From the proposed resolution:

- Advising and supporting the ARPA Strategy and Outcomes Commission on its allocation requests
- Ensuring expeditious completion and compliance with Spirit Fund expenditures approved by the Winnebago County Board of Supervisors
- Maintaining and improving the Spirit Fund dashboard required for all Spirit Fund Spending
- Providing research and analytics on budget and policy reform to create internal efficiencies and reallocation of taxpayer resources, especially on projects which qualify for Innovation Grants from the State of Wisconsin
- Working to identify and complete funding opportunity requests available to Winnebago County
- Supporting the Director of Administration and County Executive in special project management and analytics for Winnebago County departments

In conclusion, the county would greatly benefit from this position on a sunseting basis. The county has many projects to help increase efficiencies for our internal stakeholders and a position which would review processes and outcomes would greatly enhance operations and provide better service to the county board.



Bureau of Labor Statistics > Publications > Occupational Outlook Handbook > Business and Financial

OCCUPATIONAL OUTLOOK HANDBOOK

OOH HOME | OCCUPATION FINDER | OOH FAQ | HOW TO FIND A JOB | A-Z INDEX | OOH SITE MAP

We value your feedback!

Please take a short survey to help us improve the **Occupational Outlook Handbook**.

[START SURVEY](#)

Budget Analysts

PRINTER-FRIENDLY

Summary

What They Do

Work Environment

How to Become One

Pay

Job Outlook

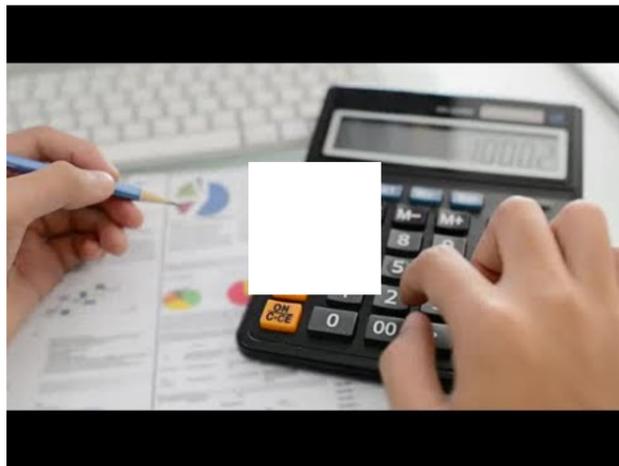
State & Area Data

Similar Occupations

More Info

Summary

Summary



Quick Facts: Budget Analysts

2021 Median Pay	\$79,940 per year \$38.43 per hour
Typical Entry-Level Education	Bachelor's degree
Work Experience in a Related Occupation	None
On-the-job Training	None
Number of Jobs, 2021	50,400
Job Outlook, 2021-31	3% (Slower than average)
Employment Change, 2021-31	1,400

[What Budget Analysts Do](#)

Budget analysts help public and private organizations plan their finances.

[Work Environment](#)

Budget analysts work in government agencies, private companies, and universities. Most work full time.

[How to Become a Budget Analyst](#)

Budget analysts typically need a bachelor's degree to enter the occupation. Courses in accounting, economics, and statistics are helpful.

[Pay](#)

The median annual wage for budget analysts was \$79,940 in May 2021.

[Job Outlook](#)

Employment of budget analysts is projected to grow 3 percent from 2021 to 2031, slower than the average for all occupations.

Despite limited employment growth, about 4,000 openings for budget analysts are projected each year, on average, over the decade. Most of those openings are expected to result from the need to replace workers who transfer to different occupations or exit the labor force, such as to retire.

[State & Area Data](#)

Explore resources for employment and wages by state and area for budget analysts.

[Similar Occupations](#)

Compare the job duties, education, job growth, and pay of budget analysts with similar occupations.

[More Information, Including Links to O*NET](#)

Learn more about budget analysts by visiting additional resources, including O*NET, a source on key characteristics of workers and occupations.

[What They Do ->](#)

What They Do

What Budget Analysts Do

Budget analysts help public and private organizations plan their finances. They prepare budget reports and monitor organizational spending.

Duties

Budget analysts typically do the following:

- Work with program and project managers to develop the organization's budget
- Review managers' budget proposals and funding requests for completeness, accuracy, and compliance with laws and other regulations
- Combine program and department budgets into a consolidated organizational budget
- Explain funding requests to others in the organization, to legislators, and to the public
- Help top managers analyze proposed plans and find alternatives if the projected results are unsatisfactory
- Monitor organizational spending to ensure that it is within budget
- Inform program managers of the status and availability of funds
- Estimate future financial needs



Budget analysts prepare budget reports and monitor spending.

Budget analysts advise organizations—including governments, private companies, and universities—about the details of their finances. They prepare annual and special reports and evaluate budget proposals. They analyze data to determine the costs and benefits of various programs, and they recommend funding levels based on their findings. Although government officials or [top executives](#) in a private company usually decide on an organization's budget, they rely on the work of budget analysts to prepare the information for that decision.

Sometimes, budget analysts use cost-benefit analyses to review financial requests, assess program tradeoffs, and explore alternative funding methods. Budget analysts also may examine past budgets and research economic and financial developments that affect the organization's income and expenditures. Budget analysts may recommend cutting spending on particular programs or redistributing funds.

Throughout the year, budget analysts oversee spending to ensure that organizations comply with the budget and to determine whether certain programs need changes in funding. Analysts also evaluate programs to determine whether they are producing desired results.

In addition to providing technical analysis, budget analysts must communicate their recommendations effectively within the organization. For example, if there is a difference between the approved budget and actual spending, budget analysts may write a report explaining those discrepancies and recommend changes to reconcile them.

Budget analysts working in government may attend committee hearings to explain their recommendations to legislators. Occasionally, budget analysts evaluate how well a program is doing, assess policy, and draft budget-related legislation.

[<- Summary](#)

[Work Environment ->](#)

Work Environment

Work Environment

Budget analysts held about 50,400 jobs in 2021. The largest employers of budget analysts were as follows:

Federal government	25%
Educational services; state, local, and private	13
State government, excluding education and hospitals	11
Local government, excluding education and hospitals	11
Professional, scientific, and technical services	9

Although budget analysts usually work in offices, they may travel to get budget details firsthand or to verify funding allocations.

Work Schedules

Most budget analysts work full time, and overtime is sometimes required during development, mid-year, and final reviews of budgets. The pressures of deadlines and tight work schedules may be stressful.

[<- What They Do](#)

[How to Become One ->](#)

How to Become One

How to Become a Budget Analyst

Budget analysts typically need a bachelor's degree to enter the occupation. Some employers prefer to hire applicants who have a master's degree. Courses in accounting, economics, and statistics are helpful.

Education



Budget analysts work in a variety of settings including government agencies, universities, and companies.

Budget analysts typically need at least a bachelor's degree in [fields](#) such as [business](#), [social science](#), [psychology](#), or [mathematics](#). Because developing a budget requires numeracy and analytical skills, coursework in accounting, economics, and statistics is helpful.

Sometimes, budget- or finance-related work experience may be substituted for formal education.

Licenses, Certifications, and Registrations

Budget analysts working in federal, state or local government may earn the optional [Certified Government Financial Manager](#) (CGFM) credential from the [Association of Government Accountants](#) (AGA). CGFM candidates must have at least a bachelor's degree, abide by the AGA's Code of Ethics, pass examinations, and complete a designated period of professional-level experience in governmental financial management. To maintain certification, CGFMs must complete continuing education.

Although the CGFM is not required, having a designation may help with career advancement.

Important Qualities

Analytical skills. Budget analysts must be able to process a variety of information, evaluate costs and benefits, and solve complex problems.

Communication skills. Budget analysts must be able to explain and defend their analyses and recommendations in meetings and legislative committee hearings.

Detail oriented. Creating an efficient budget requires careful analysis of each budget item.

Math skills. Budget analysts need math skills and the ability to use financial-management software and programs.

Writing skills. Budget analysts must present written technical information in a way that is understandable to the intended audience.

[← Work Environment](#)

[Pay →](#)

Pay

Pay

The median annual wage for budget analysts was \$79,940 in May 2021. The median wage is the wage at which half the workers in an occupation earned more than that amount and half earned less. The lowest 10 percent earned less than \$49,330, and the highest 10 percent earned more than \$124,440.

In May 2021, the median annual wages for budget analysts in the top industries in which they worked were as follows:

Professional, scientific, and technical services	\$98,030
Federal government	87,190
State government, excluding education and hospitals	79,270
Local government, excluding education and hospitals	77,320
Educational services; state, local, and private	63,890

Most budget analysts work full time, and overtime is sometimes required during development, mid-year, and final reviews of budgets. The pressures of deadlines and tight work schedules may be stressful.

[← How to Become One](#)

[Job Outlook →](#)

Job Outlook

Job Outlook

Employment of budget analysts is projected to grow 3 percent from 2021 to 2031, slower than the average for all occupations.

Despite limited employment growth, about 4,000 openings for budget analysts are projected each year, on average, over the decade. Most of those openings are expected to result from the need to replace workers who transfer to different occupations or exit the labor force, such as to retire.

Employment

Calls for efficient use of public funds will lead to continued demand for budget analysts to estimate program costs, develop budgets, and explain their findings to legislators and the public. Demand for these workers is somewhat tied to the government funding that is allocated for these positions. However, budget analysts manage resource allocation and will be needed even during times of tight budgets.



Budget analysts must present technical information in writing that is understandable for the intended audience.

Budget Analysts

Median annual wages, May 2021

Budget analysts	\$79,940
Financial specialists	\$77,300
Total, all occupations	\$45,760

Note: All Occupations includes all occupations in the U.S. Economy.

Source: U.S. Bureau of Labor Statistics, Occupational Employment and Wage Statistics

Budget Analysts

Percent change in employment, projected 2021-31

Financial specialists	6%
Total, all occupations	5%
Budget analysts	3%

Note: All Occupations includes all occupations in the U.S. Economy.

Source: U.S. Bureau of Labor Statistics, Employment Projections program

Employment projections data for budget analysts, 2021-31

Budget analysts

SOC Code:

13-2031

Employment, 2021:

50,400

Projected Employment, 2031:

51,800

Change, 2021-31 (Percent):

3

Change, 2021-31 (Numeric):

1,400

Employment By Industry:
[Get data](#)

SOURCE: U.S. Bureau of Labor Statistics, Employment Projections program

[<- Pay](#)

State & Area Data

[State & Area Data ->](#)

State & Area Data

Occupational Employment and Wage Statistics (OEWS)

The [Occupational Employment and Wage Statistics](#) (OEWS) program produces employment and wage estimates annually for over 800 occupations. These estimates are available for the nation as a whole, for individual states, and for metropolitan and nonmetropolitan areas. The link(s) below go to OEWS data maps for employment and wages by state and area.

- [Budget analysts](#)

Projections Central

Occupational employment projections are developed for all states by Labor Market Information (LMI) or individual state Employment Projections offices. All state projections data are available at www.projectionscentral.org. Information on this site allows projected employment growth for an occupation to be compared among states or to be compared within one state. In addition, states may produce projections for areas; there are links to each state's websites where these data may be retrieved.

CareerOneStop

CareerOneStop includes hundreds of [occupational profiles](#) with data available by state and metro area. There are links in the left-hand side menu to compare occupational employment by state and occupational wages by local area or metro area. There is also a [salary info tool](#) to search for wages by zip code.

[<- Job Outlook](#)

Similar Occupations

[Similar Occupations ->](#)

Similar Occupations

This table shows a list of occupations with job duties that are similar to those of budget analysts.

[Accountants and Auditors](#)

Job Duties:

Accountants and auditors prepare and examine financial records.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$77,250

[Actuaries](#)

Job Duties:

Actuaries use mathematics, statistics, and financial theory to analyze the economic costs of risk and uncertainty.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$105,900

[Cost Estimators](#)

Job Duties:

Cost estimators collect and analyze data in order to assess the time, money, materials, and labor required to make a product or provide a service.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$65,170

[Economists](#)

Job Duties:

Economists conduct research, prepare reports, and evaluate issues related to monetary and fiscal policy. They also may collect and analyze statistical data.

Entry-Level Education:

Master's degree

2021 Median Pay:

\$105,630

Financial Analysts**Job Duties:**

Financial analysts guide businesses and individuals in decisions about expending money to attain profit.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$95,570

Financial Examiners**Job Duties:**

Financial examiners ensure compliance with laws that govern institutions handling monetary transactions.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$81,410

Financial Managers**Job Duties:**

Financial managers create financial reports, direct investment activities, and develop plans for the long-term financial goals of their organization.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$131,710

Insurance Underwriters**Job Duties:**

Insurance underwriters evaluate insurance applications and decide whether to approve them.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$76,390

Management Analysts**Job Duties:**

Management analysts recommend ways to improve an organization's efficiency.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$93,000

Tax Examiners and Collectors, and Revenue Agents**Job Duties:**

Tax examiners and collectors, and revenue agents determine how much is owed in taxes and collect tax from individuals and businesses on behalf of the government.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$56,780

[← State & Area Data](#)

[More Info →](#)

More Info

Contacts for More Information

For information about the Government Financial Manager certification, visit

[Association of Government Accountants](#)

O*NET

[Budget Analysts](#)

[← Similar Occupations](#)

SUGGESTED CITATION:

Bureau of Labor Statistics, U.S. Department of Labor, *Occupational Outlook Handbook*, Budget Analysts, at <https://www.bls.gov/ooh/business-and-financial/budget-analysts.htm> (visited May 10, 2023).

Last Modified Date: Thursday, September 8, 2022

U.S. BUREAU OF LABOR STATISTICS Office of Occupational Statistics and Employment Projections PSB Suite 2135 2 Massachusetts Avenue NE Washington, DC 20212-0001

Telephone:1-202-691-5700_ www.bls.gov/ooh [Contact OOH](#)



Bureau of Labor Statistics > Publications > Occupational Outlook Handbook > Business and Financial

OCCUPATIONAL OUTLOOK HANDBOOK

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Please take a short survey to help us improve the **Occupational Outlook Handbook**.

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Management Analysts

PRINTER-FRIENDLY

[Summary](#)

[What They Do](#)

[Work Environment](#)

[How to Become One](#)

[Pay](#)

[Job Outlook](#)

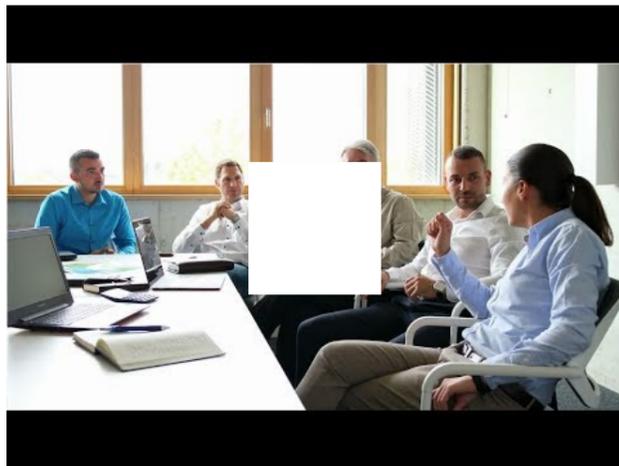
[State & Area Data](#)

[Similar Occupations](#)

[More Info](#)

Summary

Summary



Quick Facts: Management Analysts

2021 Median Pay	\$93,000 per year \$44.71 per hour
Typical Entry-Level Education	Bachelor's degree
Work Experience in a Related Occupation	Less than 5 years
On-the-job Training	None
Number of Jobs, 2021	950,600
Job Outlook, 2021-31	11% (Much faster than average)
Employment Change, 2021-31	108,400

[What Management Analysts Do](#)

Management analysts recommend ways to improve an organization's efficiency.

[Work Environment](#)

Management analysts may travel frequently to meet with clients. Some work more than 40 hours per week.

[How to Become a Management Analyst](#)

Management analysts typically need at least a bachelor's degree and several years of related work experience.

[Pay](#)

The median annual wage for management analysts was \$93,000 in May 2021.

[Job Outlook](#)

Employment of management analysts is projected to grow 11 percent from 2021 to 2031, much faster than the average for all occupations.

About 101,900 openings for management analysts are projected each year, on average, over the decade. Many of those openings are expected to result from the need to replace workers who transfer to different occupations or exit the labor force, such as to retire.

[State & Area Data](#)

Explore resources for employment and wages by state and area for management analysts.

[Similar Occupations](#)

Compare the job duties, education, job growth, and pay of management analysts with similar occupations.

[More Information, Including Links to O*NET](#)

Learn more about management analysts by visiting additional resources, including O*NET, a source on key characteristics of workers and occupations.

[What They Do ->](#)

What They Do

What Management Analysts Do

Management analysts, often called *management consultants*, recommend ways to improve an organization's efficiency. They advise managers on how to make organizations more profitable through reduced costs and increased revenues.

Duties

Management analysts typically do the following:

- Gather and organize information about the problems to be solved or the procedures to be improved
- Interview personnel and conduct onsite observations to determine the methods, equipment, and personnel that will be needed
- Analyze financial and other data, including revenue, expenditure, and employment reports
- Develop solutions or alternative practices
- Recommend new systems, procedures, or organizational changes
- Make recommendations to management through presentations or written reports
- Confer with managers to ensure changes are working



Although some management analysts work for the company that they are analyzing, most work as consultants on a contractual basis.

Although some management analysts work for the organization that they analyze, many work as consultants on a contractual basis.

The work of management analysts may vary from project to project. Some projects require a team of analysts, each specializing in one area. On other projects, analysts work independently with the client organization's managers.

Management analysts often specialize in certain areas, such as inventory control or reorganizing corporate structures for efficiency. Some focus on a specific industry, such as healthcare or telecommunications. In government, management analysts usually specialize by type of agency.

Organizations hire management analysts to develop strategies for entering and remaining competitive in the market.

Management analysts who work on contract may write proposals and bid for jobs. Typically, an organization that needs the help of a management analyst requests proposals from a number of consultants and consulting companies that specialize in the needed work. Interested companies then submit a proposal that explains details such as how the work will be completed, what the schedule will be, and how much it will cost. The organization selects the proposal that best meets its needs and budget.

[<- Summary](#)

Work Environment

[Work Environment ->](#)

Work Environment

Management analysts held about 950,600 jobs in 2021. The largest employers of management analysts were as follows:

Professional, scientific, and technical services	33%
Government	17
Self-employed workers	15
Finance and insurance	13
Management of companies and enterprises	4

Management analysts usually divide their time between their offices and the client's site. Because they must spend a significant amount of time with clients, analysts travel frequently. Analysts may experience stress, especially when trying to meet a client's demands on a tight schedule.

Work Schedules

Analysts often work many hours under tight deadlines. Some work more than 40 hours per week.



Because they must spend a significant portion of their time with clients, analysts travel frequently.

[<- What They Do](#)

How to Become One

[How to Become One ->](#)

How to Become a Management Analyst

Management analysts typically need at least a bachelor's degree and several years of related work experience.

Education

A bachelor's degree is the typical entry-level requirement for management analysts. However, some employers prefer to hire candidates who have a master's degree in business administration (MBA).

Management analysts address a range of topics, and many fields of study provide a suitable educational background. Fields of bachelor's [degree](#) study may include [business](#), [social science](#), and [engineering](#).

Licenses, Certifications, and Registrations

The [Institute of Management Consultants USA](#) (IMC USA) offers the Certified Management Consultant (CMC) designation to those who meet minimum levels of education and experience and who complete other requirements. Management analysts are not required to get certification, but having the credential may give jobseekers a competitive advantage.

Work Experience in a Related Occupation

Many analysts enter the occupation with several years of work experience. Organizations that specialize in certain fields typically try to hire candidates who have experience in those areas. For example, tax preparation firms may prefer candidates who have worked as an [accountant or auditor](#), and software companies might seek those with experience as a [computer systems analyst](#).

Advancement

As management analysts gain experience, they often take on more responsibility. Senior-level analysts may supervise teams working on complex projects and may become involved in seeking out new business. Those with exceptional skills may eventually become partners in their organization and focus on attracting new clients and bringing in revenue. Senior analysts may leave consulting and move to management positions at non-consulting organizations.

Important Qualities

Analytical skills. Management analysts must be able to interpret information and use their findings to make proposals.

Communication skills. Management analysts must be able to convey information clearly in both writing and speaking. Analysts also need good listening skills to understand an organization's problems and recommend appropriate solutions.

Interpersonal skills. Management analysts work with managers and other employees of the organizations for which they provide consulting services. They should be able to work as a team toward achieving the organization's goals.

Problem-solving skills. Management analysts must be able to think creatively to solve clients' problems. Although some aspects of clients' problems may be similar, each situation is likely to present unique challenges for the analyst to solve.

Time-management skills. Management analysts often work under tight deadlines and must use their time efficiently to complete projects on schedule.

[← Work Environment](#)

[Pay →](#)

Pay

Pay

The median annual wage for management analysts was \$93,000 in May 2021. The median wage is the wage at which half the workers in an occupation earned more than that amount and half earned less. The lowest 10 percent earned less than \$50,190, and the highest 10 percent earned more than \$163,760.

In May 2021, the median annual wages for management analysts in the top industries in which they worked were as follows:

Professional, scientific, and technical services	\$100,170
Management of companies and enterprises	96,940
Finance and insurance	83,050
Government	81,090

Management analysts working for consulting firms are usually paid a base salary in addition to a year-end bonus. Self-employed analysts are paid directly by their clients, typically by either the hour or the project.

Analysts often work many hours under tight deadlines. Some work more than 40 hours per week.

[← How to Become One](#)

[Job Outlook →](#)

Job Outlook

Job Outlook

Employment of management analysts is projected to grow 11 percent from 2021 to 2031, much faster than the average for all occupations.

About 101,900 openings for management analysts are projected each year, on average, over the decade. Many of those openings are expected to result from the need to replace workers who transfer to different occupations or exit the labor force, such as to retire.

Employment



A bachelor's degree is the typical entry-level requirement for obtaining a management analyst position.

Management Analysts

Median annual wages, May 2021

Management analysts	\$93,000
Business operations specialists	\$76,040
Total, all occupations	\$45,760

Note: All Occupations includes all occupations in the U.S. Economy.

Source: U.S. Bureau of Labor Statistics, Occupational Employment and Wage Statistics

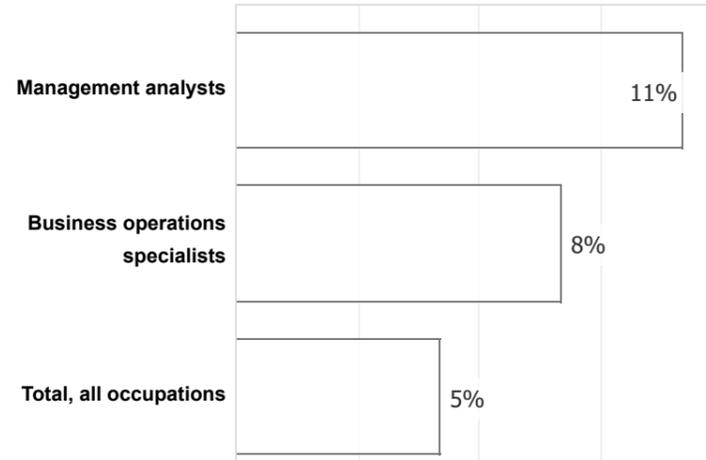
Management Analysts

Percent change in employment, projected 2021-31

Demand for consulting services is expected to increase as organizations seek ways to improve efficiency and control costs. As markets become more competitive, firms will need to use resources more efficiently.

Information technology (IT) consultants are expected to see high demand. Businesses will seek out consulting firms to help them attain a high level of cybersecurity and make sure their IT systems are efficient and up to date.

Growth is expected to be particularly strong in smaller consulting companies that specialize in specific industries or types of business function, such as information technology or human resources. Government agencies also are expected to seek the services of management analysts as they look for ways to reduce spending and improve efficiency.



Note: All Occupations includes all occupations in the U.S. Economy.

Source: U.S. Bureau of Labor Statistics, Employment Projections program

Employment projections data for management analysts, 2021-31

Management analysts

SOC Code:

13-1111

Employment, 2021:

950,600

Projected Employment, 2031:

1,059,000

Change, 2021-31 (Percent):

11

Change, 2021-31 (Numeric):

108,400

Employment By Industry:

[Get data](#)

SOURCE: U.S. Bureau of Labor Statistics, Employment Projections program

[<- Pay](#)

[State & Area Data ->](#)

State & Area Data

State & Area Data

Occupational Employment and Wage Statistics (OEWS)

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- [Management analysts](#)

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[<- Job Outlook](#)

[Similar Occupations ->](#)

Similar Occupations

Similar Occupations

This table shows a list of occupations with job duties that are similar to those of management analysts.

[Accountants and Auditors](#)

Job Duties:

Accountants and auditors prepare and examine financial records.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$77,250

[Administrative Services and Facilities Managers](#)

Job Duties:

Administrative services and facilities managers plan, direct, and coordinate activities that help an organization run efficiently.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$99,290

Budget Analysts**Job Duties:**

Budget analysts help public and private organizations plan their finances.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$79,940

Cost Estimators**Job Duties:**

Cost estimators collect and analyze data in order to assess the time, money, materials, and labor required to make a product or provide a service.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$65,170

Economists**Job Duties:**

Economists conduct research, prepare reports, and evaluate issues related to monetary and fiscal policy. They also may collect and analyze statistical data.

Entry-Level Education:

Master's degree

2021 Median Pay:

\$105,630

Financial Analysts**Job Duties:**

Financial analysts guide businesses and individuals in decisions about expending money to attain profit.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$95,570

Financial Managers**Job Duties:**

Financial managers create financial reports, direct investment activities, and develop plans for the long-term financial goals of their organization.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$131,710

Market Research Analysts**Job Duties:**

Market research analysts study consumer preferences, business conditions, and other factors to assess potential sales of a product or service.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$63,920

Operations Research Analysts**Job Duties:**

Operations research analysts use mathematics and logic to help solve complex issues.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$82,360

Project Management Specialists**Job Duties:**

Project management specialists coordinate the budget, schedule, staffing, and other details of a project.

Entry-Level Education:

Bachelor's degree

2021 Median Pay:

\$94,500

[← State & Area Data](#)

[More Info →](#)

More Info

Contacts for More Information

For more information about the Certified Management Consultant designation, visit

[Institute of Management Consultants USA](#)

For more information about other certifications in management consulting, visit

[Global Academy of Finance and Management](#)

O*NET

[Management Analysts](#)

[← Similar Occupations](#)

SUGGESTED CITATION:

Bureau of Labor Statistics, U.S. Department of Labor, *Occupational Outlook Handbook*, Management Analysts, at <https://www.bls.gov/ooh/business-and-financial/management-analysts.htm> (visited *May 29, 2023*).

Last Modified Date: Wednesday, November 16, 2022

U.S. BUREAU OF LABOR STATISTICS Office of Occupational Statistics and Employment Projections PSB Suite 2135 2 Massachusetts Avenue NE Washington, DC 20212-0001

Telephone:1-202-691-5700 www.bls.gov/ooh [Contact OOH](#)



Winnebago County Office of the County Executive

The Wave of the Future

Media Contact:
Ethan Hollenberger, 920-232-3450
ehollenberger@winnebagoountywi.gov

Winnebago County Launches Community Project Funding Opportunities *County seeks applications and ideas for Spirit Fund capital projects*

OSHKOSH, WIS. (June 22, 2023) – In March, the Winnebago County Board of Supervisors and County Executive Jon Doemel created a \$33 million dollar "Spirit Fund" dedicated from county reserves. Overseen by the ARPA Strategy and Outcomes Commission, the fund is divided into two categories: County Government Projects and Government Identified Projects.

With review on a rolling basis, the county is seeking capital project ideas and applications from organizations across the county. The ARPA Strategy and Outcomes Commission approved an [instructions document](#) guided by the [Framework of Spirit Fund Spending](#). A subsequent application was created to guide organizations in the necessary information. The application is available on the front page of the county's website: winnebagoountywi.gov.

The Office of the County Executive and ARPA Strategy and Outcomes Citizen Member Beth Oswald are leading the collation of project ideas. Projects will be reviewed by a four-member citizen work group and reported to the ARPA Strategy and Outcomes Commission. The Winnebago County Board and County Executive will have to sign-off on all projects recommended by the commission.

The first round of applications will be due on July 15, with applications reviewed on a rolling basis after that date. The commission will review recommendations in September with county board approval this fall.

"Our goal is to have as many projects submit applications as possible with a process that is easy," said Oswald, also the Oshkosh Area United Way Executive Director. "We will not be disqualifying applications on technicalities. We will be working with applicants to get all the information for the commission to make a recommendation. This is a generational opportunity to fund projects that would not otherwise be funded."

"With this one-time infusion of capital," County Executive Jon Doemel added, "community projects seeking funds should improve our county's quality of life for years to come. At this time, we will not be funding operations, programs, or pilots; rather, we are seeking to increase the infrastructure and resiliency in our county through one-time investments."

The total amount of total funding and awards will be determined by the commission with awards ranging from \$50,000 to \$500,000. All awards require county board approval.

Applications and questions should be sent to spirit@winnebagoountywi.gov. Applications should be succulent at about 2,000 words. Ideas for County Government Projects should be sent to spirit@winnebagoountywi.gov in a letter to the county executive.

###



Winnebago County

The Wave of the Future

Spirit Fund Opportunities Application

The below questions are required to be answered. Applicants can fill out in this form or create a document of your own. Attachments should be included in a single PDF with this application and emailed to spirit@winnebagocountywi.gov. Applications will not be reviewed until after July 15. Submitted applications after June 30 will be considered on a rolling basis. This application covers requests under Government Identified Community Projects. Ideas or requests for County Government Projects should be sent to spirit@winnebagocountywi.gov and will be reviewed by the County Executive.

Demographics/Basic Information

Name of Organization:

Organization Website and social media:

Mailing Address:

Application Point of Contact: Name, email, phone

CEO/Executive Director of Organization: Name, email, phone

Finance Director/Controller/CFO (if applicable): Name, email, phone

About the Organization: (history, mission, what do you do, who do you serve, etc)

Number of paid staff:

Describe the organization's ability to receive an award and comply with audit requirements:

Project Information

Name of the project:

Location of the project:

Estimated total cost of the project:

Requested award from the Spirit Funding:

How will the project improve the quality of life in the county for years to come?

How many individuals does the project anticipate serving annually?

Overall:

Within Winnebago County:

What areas of the county will the project serve?

School District, zip code, or municipalities within Winnebago County:

What is the process for tracking individuals served?

Will this project increase your operational budget? If so, what is the organization's plan to sustain and maintain the project?

Please attach the proposed scope of work and project timeline.

Project Funding

Please list funding sources (amount and funders) currently received or pledged as well as anticipated other sources of funding specific to the project.

Would Spirit Fund dollars be utilized as a match for other grants/awards/funding opportunities? If applying for other funds what is the timeline for a decision?

Does the organization conduct a third-party audit? (Attach the most current audit report)

Is the project dependent on receiving the full amount requested?

Does the proposed program involve collaboration with other organizations? (This is defined as organizations that have an established MOU or at a minimum, a strong, 2-way working relationship that together address problems and deliver outcomes that are not easily or effectively achieved by working alone.)

Government Funding

Does the organization regularly receive other government funding (local, state, or federal)? (list government and the amount)

What percent of this project will be funded by government funds (local, county, state & federal)?

Has the organization received ARPA funds from any municipality, state, or federal government?

Please list all funding received from Winnebago County in the last 5 years.

Applicant Agrees:

By submitting this application, the applicant agrees to the following

- The individual submitting the application is authorized to apply for the funds on behalf of the organization
- The project will be completed by December 31, 2026
- The funds may not be spent on operational needs or as a pilot program
- The organization may be required to conduct a third-party audit of the funds
- The organization may be requested to attend a funding interview
- The individual and key leaders of the organization have read the Spirit Fund Framework Document and Funding Opportunities Information located on the county's website

Attachment Checklist:

- Application Document
- Project Budget
- Most Current Audit Report
- Proposed Scope of Work
- Timeline for the Project
- Organization's 2023 Operating Budget



Spirit Fund Project Funding Opportunities

Background: In March of 2023, the Winnebago County Board applied surplus dollars to a special revenue fund titled the Spirit Fund to invest in legacy projects for the county government and certain identified community projects. The fund totals just over \$33 million and is split roughly in half for county government projects and identified community projects. Spending proposals are sent to the county board after deliberation of the ARPA Strategy and Outcomes Commission. The commission is putting out this funding opportunities request.

This document was approved at the commission's May 3, 2023, meeting as means to solicit community projects for the commission to identify for the county board to fund.

Minimum and Maximum Awards: For planning purposes, a minimum award is \$50,000 with a maximum award of \$500,000. The commission upon review may choose to increase the maximum awards. Proposals seeking more than \$500,000 should include a section on why more funding is needed.

Match Dollars: Matching funds are required. No award may exceed 50% of the total project cost. Other government funds are eligible for match. All government funds should not exceed 75% of the total project unless the proposal is for a government project. Private and foundation matching dollars are preferred.

One-time funds: The commission is seeking ideas to fund legacy, one-time funds. At this time, pilot programs which require on-going or future costs will not be considered. Requests for operational dollars will also not be considered.

Framework of Spirit Fund Spending: All proposals should clearly articulate how the project complies with as many outcomes identified in the commission approved Framework of Spirit Fund Spending document.

Broad Categories and Funding Available: At this time, it is unknown how much total funding is available. The amounts included in the Spirit Fund planning document are below and are a best guess of allocation. In addition to the framework document, proposals should fit into three broad categories.

Health and Human Services - \$2,500,000

Economic Development and Housing Initiatives - \$6,120,624

Veterans Transitional Housing - \$1,000,000

Project Completion: It is expected that all projects which receive awards are completed by December of 2026.

Other County Funding: All proposals must identify any county funding, including pass through grants, received in the past ten years, and requested in 2023 and 2024 from all departments.

Other Funding Opportunities: Proposals which identify other funding or grant opportunities are encouraged even if the organization submitting is not requesting the funds. Ideas for using Spirit Fund dollars as a required match in other grant and funding opportunities are especially encouraged.

Single-Audit: All organizations receiving money may be required to submit a single-audit or other audit documents. Previous years' audits may be requested prior to awarding of Spirit Funds.

Length of Application: All proposals are limited to a word count of 2000.

Attachments: There is no limit to attachments; however, attachments may not be scored.

Submission and questions: All proposals and questions should be submitted to spirit@winnebagocountywi.gov by July 15, 2023. Question answers will be posted to the Winnebago County website.

Review and Scoring: All proposals will be reviewed and scored by a citizen member of the ARPA Strategy and Outcomes Commission in July with staff support from the Office of the County Executive. The citizen member will be determined by a majority vote of the commission. With consent of the commission co-chairs, the citizen member may choose up-to three additional citizen reviewers. Each reviewer will represent one of the following areas: Oshkosh, Neenah/Menasha, and the rural areas. No additional reviewer may have a conflict of interest with any of the applications.

The commission appointed Beth Oswald as the citizen member to lead scoring.

Ideas for County Government Projects: This announcement of funding opportunities is intended for community projects. Ideas for County Government Projects could be submitted using the same email address and 2000-word limit.

Advertising of this document: This document will be posted on the front page of the county website, released with a press release to the media, emailed to all current partners of the county, emailed to all local governments in the county, and emailed to the Oshkosh Area Community Foundation, United Ways covering the county & chambers of commerce covering the county to encourage those entities to email to potential applications.

Spirit Fund Funding Opportunity FAQ

Who is eligible to complete an application?

All organizations (government, not-for-profit, and businesses) are eligible to submit an application; however, the person submitting the application must have the authority to do so. Organizations should be submitting applications for themselves.

How do I know if I am eligible as a "Government Identified Community Project"?

The Spirit Fund has been split into two categories: County Government Projects and Government Identified Community Projects. The ARPA Strategy and Outcomes Commission is seeking projects which are intended to be a collaboration between county departments and community.

What if I have an idea for a county government project?

Send a letter to spirit@winnebagoctywi.gov addressed to County Executive Jon Doemel. The ARPA Strategy and Outcomes Commission has tasked him with presenting projects in that category.

When is the deadline? Will late entries be accepted?

Applications are due July 15. After that date, applications will be reviewed on a rolling basis.

What is the timeline for funding decisions?

Applications are due on July 15 to spirit@winnebagoctywi.gov. A four-person citizen panel will make recommendations to the ARPA Strategy and Outcomes Commission with the first awards advancing to the county board this fall.

How strict is the 2,000-word count limit?

Applicants should be as succinct as possible. Applications will not be thrown out on a technicality as minor as a word count limit.

Do I have to submit the application in the same format as on the website?

No, you can put together your own package; however, all questions should be clearly, succinctly answered. The work group is looking for those specific answers. Providing additionally narrative which you feel adequately explains your project's long-term impact on the county's quality of life or how your project solves a specific problem will not be disqualified. Not answering all the questions could result in the process taking longer.

Do I have to fit into one of the three categories?

For planning purposes, money was allocated to health & human services, economic development & housing, and Veterans transitional housing. Project applications should ensure compatibility with the Framework of Spirit Fund Spending and identify whether or not the project is within the three categories listed.

When do funds have to be spent?

Projects must be completed by December 31, 2026.

Do I have to list each individual donor pledging to give toward my project?

No, we will accept categories of pledged and anticipated with amounts (i.e: individual donors: \$xxx, corporate gifts: \$xxx, community grants: \$xx, City/state/federal grants: \$xxx)

Spirit Fund Funding Opportunity FAQ

When should I show up to a meeting?

Applicants will be communicated with on when they are required to attend a meeting. It is not necessary for applicants to attend meetings until requested. Attendance at commission or county board meetings will not increase or decrease the work group's chances of recommending a project.

Does working with a county department increase my chances of receiving an award?

Not necessarily. Applications should identify when county departments may be involved or how the project will improve services provided by a county department.

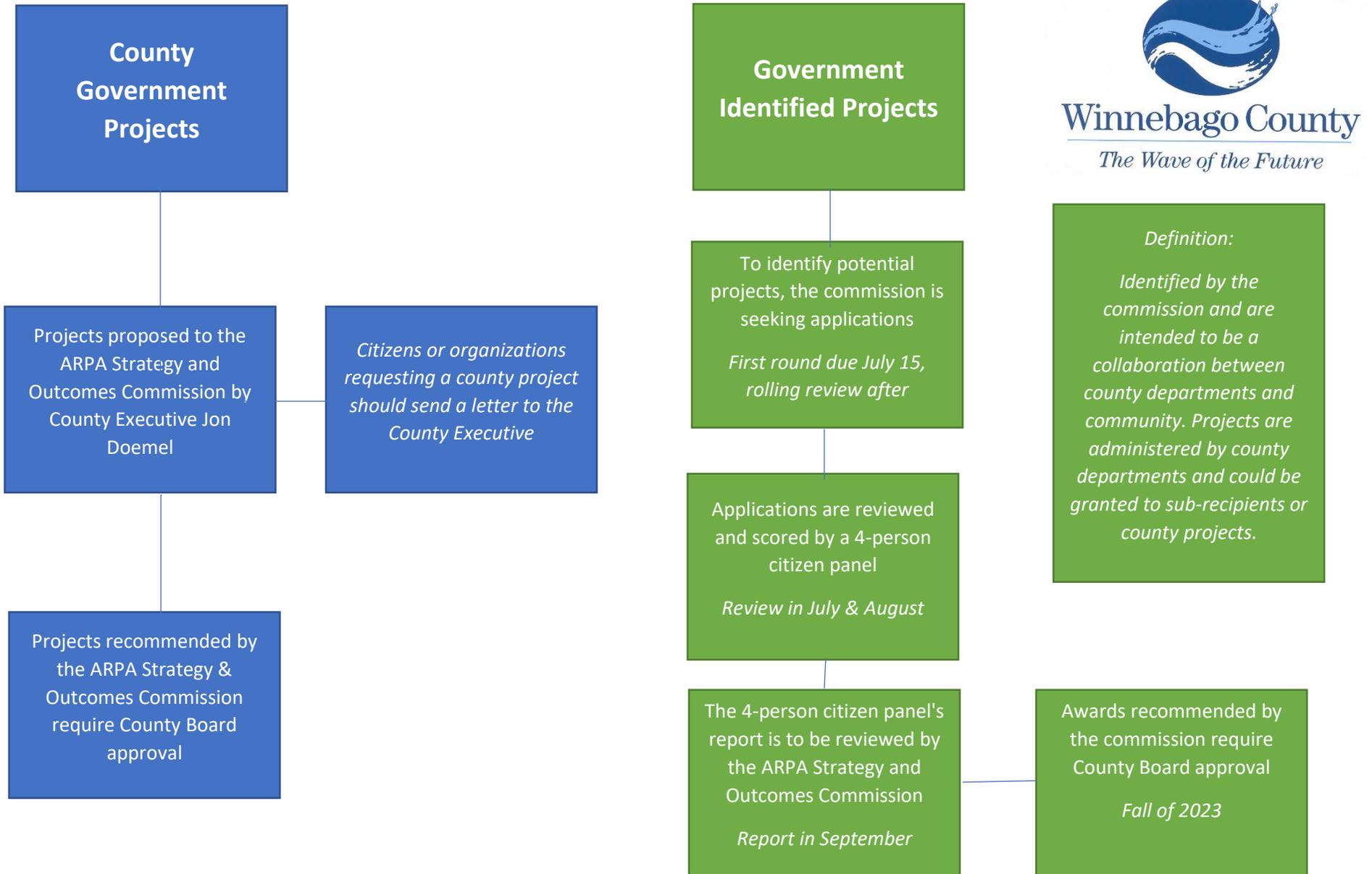
Will projects be submitted individually or as a package to the county board? Can the county board change an award amount?

The ARPA Strategy and Outcomes Commission will determine whether projects meet the criteria to be submitted as a group or individually. The county board could reduce or deny specific projects even if recommended by the commission.

Who do I contact if I have a specific question?

All additional questions should be emailed to spirit@winnebagocountywi.gov. Requests for meetings may not be granted due to time constraints.

Spirit Fund Opportunities Flowchart





Framework of the Spirit Fund Spending

Prepared by the ARPA Strategy and Outcomes Commission

Reviewed at the March 9, 2023, meeting

Approved unanimously at the April 14, 2023, meeting

Overarching Requirements

Legacy: *projects are to be ones which can be looked at as multi-generational or used to improve the quality of life within our county for years to come*

One-time-funds: *projects which require on-going or future costs should be mitigated as much as possible. To achieve this requirement, projects should generally be capital in nature, revolving funds, or endowments.*

Geographic Assortment of Funds: *projects should be spread out as much as possible to impact different geographic areas of the county*

Enhancing Funding Opportunities: *Frequently, other funding opportunities require matching funds. Using Spirit Fund dollars as local match should be encouraged to allow the dollars to go further.*

Project Types to Base Decisions

Debt Avoidance: *When a local government issues debt, typically, it is done so under the debt levy; therefore, debt raises property taxes. As much as possible, projects should avoid Winnebago County's issuance of debt to avoid future tax increases.*

Sustainability Planning: *As these are one-time funds, planning for the future and preparing for potential fiscal cliffs is essential. Projects of this type should look to efficiency, consolidation, and reform.*

Emergency Response: *The original ARPA legislation called for improving resiliency in response to emergencies. Improvements to our emergency response system are essential to this goal.*

Water Quality & Sustainability: *Winnebago County is covered by 25% water and has about 10% of the state's inland surface water.*

Quality of Life: *Parallel with water, Winnebago County's people are an important resource. Projects which improve our quality of life including enhancements to tourism, health, and human services are appropriate. The wellbeing of our citizens ensures we can recruit and maintain our workforce. Projects should especially consider that basic needs are met.*

Categories to Divide the Funds

Percentages could be changed by the commission as projects and priorities are more clearly defined.

County Government Projects (~50% of funds)

These projects are proposed by the County Executive and his department head team. The projects are also led and complete by the county. Projects should be balanced between already planned and projects which would not otherwise be completed without the infusion of investment.

Government Identified Community Projects (~50% of funds)

These are projects which are identified by the commission and are intended to be a collaboration between county departments and community. Projects are administered by county departments and could be granted to sub-recipients or county projects.

Changes to this document may be made from time-to-time by a majority vote of the ARPA Strategy and Outcomes Commission.