STATE OF OREGON
POSITION DESCRIPTION

Agency: Oregon Department of Education
Division: Office of Finance and Administration

SECTION 1. POSITION INFORMATION

a. Classification Title: Program Analyst 3
b. Classification No: C0862

c. Effective Date:
d. Position No: 1712.560

e. Working Title: School Facilities Program Analyst
f. Agency No: 58100

g. Section Title: School Finance and School Facilities
h. Budget Authorization No: 001253210

i. Employee Name:
j. Representation Code: OA

k. Work Location (City-County): Salem, Marion
l. Supervisor Name (optional): Michael Wiltfong

m. Position: ☑Permanent ☐Seasonal ☐Limited duration ☐Academic Year
              ☐Full Time ☐Part Time ☐Intermittent ☐Job Share

n. FLSA: ☑Exempt ☐Non-Exempt
          If Exempt: ☐Executive ☑Professional ☐Administrative

o. Eligible for Overtime: ☑Yes ☐No

SECTION 2. PROGRAM AND POSITION INFORMATION

a. Describe the program in which this position exists. Include program purpose, who’s affected, size, and scope. Include relationship to agency mission.

The Oregon Department of Education (ODE) provides leadership for all elementary and secondary students in Oregon’s public school districts and education service districts. Responsibility also extends to public preschool programs, the state School for the Deaf, regional programs for children with disabilities, and education programs in Oregon youth correctional facilities. Our mission is to foster excellence for every learner through innovation, collaboration, leadership, and service to our education partners. We value equity for every student, high-quality education, service, leadership, and teamwork. We are results-focused and believe people are our greatest asset.

ODE includes approximately 500 employees at the Public Service Building, the Employment Department Building, the State Lands Building, Office of Child Care locations around the state, the Oregon School for the Deaf (OSD), Lord High School at MacLaren, and Robert F. Farrell School at Hillcrest. OSD employees include academic-year staff who work nine and one-half months during the regular school year (late August to mid-June each year) and two months of summer school programs. OSD operates on a five-day-a-week, 24-hour-a-day basis.

The Office of School Facilities, located in the Oregon Department of Education, is charged with statewide planning and leadership in creating new programs to address the deterioration of Oregon’s public school facilities. The office, established by SB 447 (2015), issues state general obligation bonds, awards matching grants to districts, and coordinates statewide planning for long-range facility improvements. The Office of School Facilities has four programs available to increase capital investment across the state.
The first program is the Oregon School Capital Improvement Matching Program (OSCIM Program). The OSCIM Program is funded each biennium by general obligation bonds, authorized by the legislature and issued by the Department of Education. For the 2015-17 biennium, the legislature authorized the department to issue $126.2 million in state-backed general obligation bonds. This will result in approximately $123 million in net proceeds to be made available to local districts for capital improvements.

The OSCIM Program works by providing a commitment of state funds as an incentive to generate matching local investments. If a community passes a local general obligation bond, then the state commitment will be awarded to the community’s school district for a matching grant up to $8 million.

The second program is to provide technical assistance grants to districts. These grants will enable districts to hire certified contractors to provide facilities assessments, long range facilities plans, seismic assessments, and other specialized assessments. The goal of this program is to provide districts with the ability to plan for capital improvements and expansion so they can better inform their communities about the need for bonds.

The third program is targeted to provide hardship grants to districts. The purpose of these grants is to provide assistance to a district that has immediate and pressing facilities needs that potentially affect the health and safety of the students served by that district. The hardship grants are made available through unspent Facility Grant funds administered through the State School Fund.

The final portion of the Office of School Facilities is the establishment and maintenance of a statewide school facilities database. The Office will pull in data from other state agencies and school districts to provide a comprehensive view of school facilities in the state. This data will be accessible by the public.

To accomplish these goals, the Office of School Facilities works closely with other state agencies, professional firms and local school districts. The office must collaborate with the Oregon State Treasury in the issuance of bonds. Additionally, the Office must collaborate with a variety of state agencies and school districts to gather facilities data and administer the program.

b. Describe the primary purpose of this position, and how it functions within this program. Complete this statement: The primary purpose of this position is to:

Assist the School Facilities Coordinator with the daily operations of the Office of School Facilities, which includes, but not limited to, work relating to the Oregon School Capital Improvement Matching Program (OSCIM Program), Technical Assistance and Hardship grants, website work, database administration and the issuance of state bonds. This position will also be responsible for developing standards for program operations in conjunction with the Governor’s vision for healthy and safe schools.

c. Desired attributes:
   • SharePoint experience
   • Construction/project management experience
   • Experience in qualitative and quantitative data analysis

SECTION 3. DESCRIPTION OF DUTIES

List the major duties of the position. State the percentage of time for each duty. Mark “N” for new duties, “R” for revised duties or “NC” for no change in duties. Indicate whether the duty is an “Essential” (E) or “Non-Essential” (NE) functions.

<table>
<thead>
<tr>
<th>% of time</th>
<th>N/R/NC</th>
<th>E/NE</th>
<th>DUTIES</th>
</tr>
</thead>
</table>

Form: December 2015
| 40% | N | E | - Develop and implement program standards for operations for various programs within the office.  
- Oversee program(s) as determined by supervisor  
- Review and analyze data submitted to the school facility data collection.  
- Provide technical assistance to districts to ensure complete and accurate submissions, including expertise in type of data being submitted.  
- Write reports based on information in the school facility database to be sent to the public, stakeholders and legislators.  
- Improve database design by working with programmers and business analysts to refine data being collected. |
| 15% | N | E | - Provide support in the awarding of funds under the Oregon School Capital Improvement Matching Program (OSCIM Program).  
- Review applications for the OSCIM Program to ensure compliance with Oregon Department of Education policies, Oregon Administrative Rules (OAR), and ORS.  
- Provide guidance to Oregon school districts regarding the OSCIM Program application, policies and rules.  
- Recommend policy modifications to better implement the goals of the OSCIM Program. |
| 15% | N | E | - Process the awarding of funds to school districts who qualify for hardship grants or technical assistance grants.  
- Review the applications for grant programs to ensure compliance with ODE policies, OAR, and ORS.  
- Coordinate the execution of grant agreements with districts that received an award.  
- Coordinate the disbursement of funds to school districts that have met the necessary criteria.  
- Recommend changes in policies to better implement these ODE programs. |
| 20% | N | E | - Update and maintain the website with new information and changes to policies and other documents.  
- Maintain the list of certified contractors able to provide specialized assessments for school districts.  
- Provide assistance to school districts in using and reporting to the database.  
- Review policies to be consistent with ORS and OAR.  
- Recommend changes to program based on feedback and interactions with the school districts.  
- Provide review of data from the Oregon School Facilities database.  
- Coordinate with other ODE staff to provide trainings to school districts on the submission to and use of the database. |
| 5% | N | E | - Provide staff assistance to the OSCIM Program advisory groups.  
- Maintain a list of advisory group members and contact information.  
- Attend meetings and take minutes of meetings if needed.  
- Present suggested policy changes based on input from advisory group. |
SECTION 4. WORKING CONDITIONS

Describe any on-going working conditions. Include any physical, sensory, and environmental demands. State the frequency of exposure to these conditions.

- Works in normal office environment.
- Occasional travel and extended hours may be required.
- High visibility and deadlines can be expected.

SECTION 5. GUIDELINES

a. List any established guidelines used in this position, such as state or federal laws or regulations, policies, manuals, or desk procedures.

Oregon Constitution; Oregon Revised Statutes and Chapter Laws; Administrative Rules; Federal Laws, Regulations, Requirements, and Guidelines; federal Internal Revenue tax laws; Generally Accepted Accounting Principles (GAAP); ODE Policies and Procedures; Securities and Exchange Commission Regulations; and any other appropriate standards and/or regulations.

d. How are these guidelines used?

The Constitution provides guidelines on purposes for which various types of debt can be issued. State statutes and laws are used to provide guidance on specific projects and programs approved for funding by the Legislature. Administrative Rules and ODE Policies and procedures are used to provide guidelines for the administration of the programs. Federal regulations are used as guidelines in analyzing allowable uses of bond proceeds. Securities and Exchange Commission regulations are used to guide municipal market disclosure requirements.

SECTION 6. WORK CONTACTS

With whom, outside of co-workers in this work unit, must the employee in this position regularly come in contact?

<table>
<thead>
<tr>
<th>Who contacted</th>
<th>How</th>
<th>Purpose</th>
<th>How Often</th>
</tr>
</thead>
<tbody>
<tr>
<td>Other ODE staff, School and district staff</td>
<td>Phone, email, in person</td>
<td>Provide information, answer questions, seek clarification</td>
<td>Daily</td>
</tr>
<tr>
<td>Educational organizations, private citizens, Other stakeholders</td>
<td>Phone, email, in person</td>
<td>Provide information, answer questions, seek clarification</td>
<td>Daily</td>
</tr>
<tr>
<td>---------------------------------------------------------------</td>
<td>------------------------</td>
<td>----------------------------------------------------------</td>
<td>------</td>
</tr>
<tr>
<td>Other State Agencies</td>
<td>Phone, email, in person</td>
<td>Provide information, answer questions, seek clarification</td>
<td>Monthly</td>
</tr>
<tr>
<td>Legislative Staff</td>
<td>Phone, email, in person</td>
<td>Testify to legislative committees; respond to inquiries on bond program matters; discuss agency capital projects</td>
<td>As needed</td>
</tr>
<tr>
<td>Trustee, Disbursement Agent, Bond Counsel, Municipal Advisor, Underwriters and Treasury Staff</td>
<td>Phone, email, in person</td>
<td>Provide guidance and expectations in the issuance of new debt, discuss new or outstanding debt to coordinate account setup and maintenance, electronic transfers of funds, debt service payments, and SEC disclosures</td>
<td>As needed</td>
</tr>
</tbody>
</table>

### SECTION 7. POSITION RELATED DECISION MAKING

Describe the typical decisions of this position. Explain the direct effect of these decisions.

Decisions and recommendations made by the employee may have a significant impact on public and fiscal policy and have a high level of visibility and consequence. Decisions may affect the timely completion and overall success of asset acquisition, construction and improvement of bond financed capital assets for school districts throughout the state, including critical facilities and infrastructure utilized by thousands of school district staff and students. The effect of poor decisions in this position could have an extremely negative impact on the bond program and success of all programs in the Office of School Facilities.

### SECTION 8. REVIEW OF WORK

Who reviews the work of the position?

<table>
<thead>
<tr>
<th>Classification Title</th>
<th>Position Number</th>
<th>How</th>
<th>How Often</th>
<th>Purpose of Review</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal Exec/Mgr F</td>
<td>121</td>
<td>Meetings, review of production</td>
<td>As needed</td>
<td>Review workload, etc.</td>
</tr>
</tbody>
</table>

### SECTION 9. OVERSIGHT FUNCTIONS

a. How many employees are directly supervised by this position? 0
   How many employees are supervised through a subordinate supervisor? 0

b. Which of the following activities does this position do?

- [ ] Plan work
- [ ] Assigns work
- [ ] Approves work
- [ ] Coordinates schedules
- [ ] Hires and discharges
- [ ] Recommends hiring
| ☐ Responds to grievances | ☐ Gives input for performance evaluations |
| ☐ Disciplines and rewards | ☐ Prepares & signs performance evaluations |

### SECTION 10. ADDITIONAL POSITION-RELATED INFORMATION

ADDITIONAL REQUIREMENTS: List any knowledge and skills needed at time of hire that are not already required in the classification specification:

This position is subject to a criminal records check, which may require fingerprints. If you are offered employment, the offer will be contingent upon the outcome of a criminal records check (FBI). Any history of criminal activity will be reviewed and could result in the withdrawal of the offer or termination of employment. You are responsible to promote and foster a diverse and discrimination/harassment-free workplace; establish and maintain professional and collaborative working relationships with all contacts; contribute to a positive, respectful and productive work environment; maintain regular and punctual attendance; perform all duties in a safe manner; and comply with all policies and procedures. Working in a team oriented environment requires participative decision making and cooperative interactions among staff and management. You are to be aware of Affirmative Action and the department’s Diversity strategies and goals.

Employee is required to possess and maintain a valid driver’s license issued by the state where the employee resides or provide an acceptable alternate mode of transportation.

BUDGET AUTHORITY: If this position has authority to commit agency operating money, indicate the following:

<table>
<thead>
<tr>
<th>Operating Area</th>
<th>Biennial amount ($00000.00)</th>
<th>Fund type</th>
</tr>
</thead>
</table>

### SECTION 11. ORGANIZATIONAL CHART

Attach a current organizational chart. Be sure the following information is shown on the chart for each position: classification title, classification number, salary range, employee name, and position number.

### SECTION 12. SIGNATURES

<table>
<thead>
<tr>
<th>Employee Signature</th>
<th>Date</th>
<th>Supervisor Signature</th>
<th>Date</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Appointing Authority Signature</th>
<th>Date</th>
</tr>
</thead>
</table>