



State of Oregon Position Description

Company: Oregon Department of Education
Organization: Fiscal Transparency - ODE
Service Type:

SECTION 1. POSITION INFORMATION

Job Profile Title:	Fiscal Analyst 1	Job Profile ID:	1243
Business Title:	Fiscal Health Analyst (Unfilled)	Position ID:	000000182469
Employee Name:		Company ID:	58100
Representation:	OAS	Budget Auth No:	
Location:	Salem ODE Public Service Building		
Supervisor:	Devyn Castillo (Research, Analysis, and Statistics Manager 3)		
Position:			
Time Type:	Full Time		
FLSA:	Non Exempt		
Exempt Reason:			
Overtime Eligible:	Yes		
Employee Type:	Limited Duration (Fixed Term)		

SECTION 2. JOB DESCRIPTION SUMMARY

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

The Oregon Department of Education (ODE) oversees the education of students in Oregon's public K-12 education system. ODE encompasses early learning, public preschool programs, the state School for the Deaf, regional programs for children with disabilities, and education programs in Oregon youth corrections facilities. While ODE isn't in the classroom directly providing services, the agency (along with the State Board) focuses on helping districts achieve both local and statewide goals and priorities through strategies such as: developing policies and standards, providing accurate and timely data to inform instruction, training teachers on how to use data effectively, effectively administering numerous state and federal grants; sharing and helping districts implement best practices. At the Oregon Department of Education, we are guided by the following values: integrity, accountability, excellence, and equity.

The Deputy Superintendent of Public Instruction is the Director and administrative head of the Department of Education. The Governor, who is the Superintendent of Public Instruction has delegated to the Deputy Superintendent the responsibility of performing all of the duties, functions and powers of the Superintendent. These include providing leadership and oversight to Oregon's prekindergarten to grade 12 education system. The Deputy Superintendent is the chief executive officer for the State Board

of Education and is responsible for interpreting and administering Board policies and rules. All employees working in the Department are expected to assist in achieving the Department's diversity and affirmative action goals by creating an inclusive work environment that encourages each employee to meet their full potential and consider Education as their "Employer of Choice."

The Office of Finance and Information Technology (OFIT) provides timely and reliable fiscal, administrative, and information technology services. This work is designed to ensure that all agency services adhere to applicable laws and regulations while seeking solutions focused on the needs of Oregon's children. OFIT contributes to an infrastructure that allows ODE staff to focus on the core mission of leadership, accountability, and school improvement.

OFIT consists of seven Units for Financial Services, Budget Services, Business Services, Procurement Services, School Finance and Facilities, Fiscal Transparency and Information Technology. Collectively, the office covers a full range of business services that are provided to support agency staff and external partners. Through these different Units, the mail is processed, bills are paid, contracts are developed and executed, the agency budget is developed, funds are managed and distributed to local schools districts, and ESDs, school buildings are monitored to ensure the safety of our children, information technology and project management support is given to both internal and external customers, technology solutions are developed, enhanced, and managed; and agency facilities/space issues are addressed. OFIT acts as reliable customer service partners for the rest of the agency to meet the business needs and objectives of our mission.

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:

Provide analytical, research, and data support to the Fiscal Transparency Unit's statewide fiscal health and early-warning program. This position helps monitor and assess the financial condition of Oregon school districts and ESDs using fiscal health indicators, financial reporting data, and related metrics. This position will:

- Conduct structured analysis of district financial data.
- Support fiscal health dashboards and workflows.
- Identify anomalies or early-warning indicators.
- Assist in preparing district fiscal profiles.
- Support the fiscal health and PBAM implementation workstreams.

SECTION 3. JOB DESCRIPTION

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) function.

40% - R E - Fiscal Health Monitoring and Data Support

- Review monthly and annual financial submissions from school districts to ensure completeness, accuracy, and adherence to state reporting requirements.
- Monitor district financial performance by updating fiscal health dashboards and assisting with monthly refresh cycles.
- Calculate, track, and document key fiscal indicators such as fund balance ratios, expenditure trends, enrollment-adjusted metrics, and revenue stability.
- Flag early-warning indicators and prepare summary notes for senior analysts to support proactive district engagement.

25% - R E - Financial Analysis and Research

- Conduct baseline analysis for district fiscal health profiles, including trend analysis, year-over-year comparisons, and expenditure composition.
- Research statewide financial trends, spending patterns, and contextual factors that may affect district fiscal health.
- Support long-term sustainability studies by compiling data, performing preliminary analysis, and preparing initial findings for senior staff review.
- Develop charts, tables, summaries, and draft narrative explanations for internal reports and presentations.

15% - R E - Data Validation and Quality Assurance

- Perform routine quality checks on district submissions, including cross-validation with annual audit reports, budget documents, and historical data.
- Identify discrepancies or missing elements in submitted datasets and follow up with districts or internal teams to resolve issues.
- Maintain organized and accurate datasets that feed into dashboard development, fiscal models, and statewide reporting.
- Document validation issues and contribute to continuous improvement of QA procedures.

10% - R E - Support to Fiscal Transparency Initiatives

- Assist with implementation of new PBAM fiscal health data elements, including reviewing coding guidance and supporting pilot testing.
- Contribute to the development of procedural guides, documentation, and reference materials that explain how fiscal health metrics are calculated and used.
- Support coordination across data collections, dashboards, and reporting tools to ensure alignment with statewide fiscal transparency goals.

5% - R E - Technical Assistance and Training Support

- Respond to routine district questions regarding fiscal health indicators, data submissions, and PBAM requirements.
- Assist in preparing training materials, quick reference guides, and walkthroughs to help districts understand fiscal health reporting requirements.
- Support training sessions by compiling examples, drafting talking points, and preparing demonstration datasets.

5% - N NE - Other Duties as Assigned

At all times - N E:

Demonstrate commitment to equity, in addition to the cultivation of equitable practices across all aspects of this position description:

- Learn and apply knowledge and skills to interrupt systemic oppression.
- Participate and engage in efforts to further OFIT and agency-wide development and implementation of equity goals.
- Have knowledge of and apply tools, such as the ODE Equity Stance and Equity Lens, Strategic Plan, Culturally Responsive Community Engagement tool, the Protocol for Culturally Responsive Organizations, etc., to ensure that the shared vision and mission of OFIT and ODE is clearly articulated in all work produced.

Demonstrate professionalism

Consistently treats customers, partners, vendors and co-workers with dignity and respect.

Creates and maintains a work environment that is welcoming and respectful of diversity. Sets clear guidelines and models expected professional behaviors.

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.

- Time-sensitive financial data reviews
- Computer-based analysis

Works in a typical office environment. Frequent contact by telephone, e-mail, in writing or in person with agency executive management and staff, staff from other local, state, and federal agencies, legislative staff, education and community partners, and members of the public. High-level coordination with internal and external customers. When travel is permitted, there may be occasional automobile and overnight travel throughout the state for trainings and/or meetings, which may require sitting/driving for extended periods of time; occasional evening and weekend work required.

This position may be eligible for hybrid remote work, subject to manager approval, business needs, and completion of a remote work agreement in Workday. Employees must have a home workspace that meets all technology, security, and safety requirements, including protection of confidential information. Remote work requires use of agency-issued equipment, a secure internet connection, and VPN access. Staff must follow the DAS Remote Work policy, guidelines and applicable collective bargaining agreements. The official duty station is the Public Service Building in Salem, Oregon. Travel to this location may be required at the employee's expense

SECTION 5. GUIDELINES

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

Oregon Revised Statutes and Chapter Laws; Oregon Administrative Rules; Federal Laws, Code of Regulations (CFR), Requirements, and Guidelines; Oregon Accounting Manual Rules and Regulation; and ODE Policies and Procedures.

How are these guidelines used?

Oregon Revised Statutes and Chapter Laws provide guidance on specific projects and programs approved for funding by the Legislature, as well as guidance on various administrative processes (procurement, debt issuance, collections, State School Fund formula, etc.). Administrative Rules, Oregon Accounting Manual and ODE Policies and procedures are used to provide guidelines for the administration of the programs and/or processes. Federal Statutes, regulations, and guidelines are used to monitor appropriate use of federal funds and monitor for changes in funding authorizations.

SECTION 6. WORK CONTACTS

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

Who	How	Purpose	How Often?
Educational organizations, Tribes, private citizens, and other partners	In Person, by mail, email or telephone	Provide information, answer questions, seek clarification	Daily
Legislative Staff/Members	In Person, by mail, email or telephone	Provide information, answer questions, seek clarification	As Needed
Other ODE management, staff, and grant recipients	In Person, by mail, email or telephone	Provide information, answer questions, seek clarification	Daily
Other State Agencies	In Person, by mail, email or telephone	Provide information, answer questions, seek clarification	As Needed

SECTION 7. POSITION RELATED DECISION MAKING

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

Must have detailed understanding of government processes, financial principles. Ability to manage large and diverse projects with ever-changing structures and timelines. Very detailed oriented and strong conceptual reasoning ability and ability to apply abstract thinking in order to develop systems and process. Ability to work on very tight timelines.

SECTION 8. REVIEW OF WORK

Job Profile	Position ID	How	How Often	Purpose of Review
Accounting Manager 3	2700075	In Person, by mail, email or telephone	As Needed	Review workload, etc.

SECTION 9. OVERSIGHT

What are the oversight activities for this position?

SECTION 10. ADDITIONAL POSITION RELATED INFORMATION

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

Knowledge of:

- Financial analysis and accounting basics; Governmental or nonprofit accounting (introductory); Excel, Power Query, Power BI; Data validation techniques

Skills and Ability to:

- Analyze numerical data for trends; Communicate findings clearly; Prepare basic visualizations; Organize and manage multiple assignments; Work collaboratively

Demonstrated commitment to system change that accelerates opportunities by removing barriers for students in our K-12 system who are and have been historically underserved.

This position requires successfully passing a pre-employment background check. The pre-employment check may include a review of the following records: criminal background, DMV, licensure, and sexual misconduct. Adverse background data may be grounds for immediate disqualification, withdrawal of a conditional job offer, or termination of employment.

SECTION 11. BUDGET AUTHORITY

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

Operating Area	Biennial Amount	Fund Type
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SECTION 12. ORGANIZATIONAL CHART

See Organizational Chart (attach copy or view within Workday).

SECTION 13. SIGNATURES

_____ Employee	_____ Date
_____ Manager	_____ Date
_____ Appointing Authority	_____ Date