



# State of Oregon Position Description

**Company:** Oregon Department of Education  
**Organization:** Office of Finance & Administration | Fiscal Transparency - ODE  
**Service Type:**

## SECTION 1. POSITION INFORMATION

|                           |                                               |                        |              |
|---------------------------|-----------------------------------------------|------------------------|--------------|
| <b>Job Profile Title:</b> | Research Analyst 4                            | <b>Job Profile ID:</b> | 1118         |
| <b>Business Title:</b>    | Education Finance Research Analyst (Unfilled) | <b>Position ID:</b>    | 000000167377 |
| <b>Employee Name:</b>     |                                               | <b>Company ID:</b>     | 58100        |
| <b>Representation:</b>    | OAS                                           | <b>Budget Auth No:</b> | 1418591      |
| <b>Location:</b>          | Salem   ODE   Public Service Building         |                        |              |
| <b>Supervisor:</b>        | Rob Freytag (Accounting Manager 3)            |                        |              |
| <b>Position:</b>          |                                               |                        |              |
| <b>Time Type:</b>         | Full Time                                     |                        |              |
| <b>FLSA:</b>              | Exempt                                        |                        |              |
| <b>Exempt Reason:</b>     | Administrative Exemption                      |                        |              |
| <b>Overtime Eligible:</b> | No                                            |                        |              |
| <b>Employee Type:</b>     | Permanent                                     |                        |              |

## 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 Office of Finance and Administration (OFA) provides timely and reliable fiscal and administrative services. This work ensures that all agency services adhere to applicable laws and regulations while seeking solutions focused on the needs of Oregon's children. The office consists of the Financial Services, Business Services, Budget Services, Procurement Services, School Finance and School Facilities units, and the Fiscal Transparency Unit. Collectively, the office supports agency and statewide education operations

through bill payment, grant processing, contract development, budget development and management, fund distribution to school districts, facilities oversight, agency space management, mail services, reception services, and fiscal transparency initiatives directly related to ODE's accountability efforts. The office acts as a reliable customer service partner for the rest of the agency to meet business needs and objectives of our mission.

The Fiscal Transparency unit (FTU) exists within the Office of Finance and Administration at the Oregon Department of Education. The unit provides strategic leadership, data governance, and systems oversight to enhance transparency, accountability, and fiscal reporting throughout Oregon's K-12 public education system. The program develops tools and resources for internal and external stakeholders, oversees the statewide chart of accounts, conducts fiscal health monitoring, and ensures data submitted by school districts aligns with state and federal requirements. The work directly supports the agency's mission to foster equity and excellence for every learner.

This position is responsible for planning, leading, and managing the development, implementation, and evaluation of major research or complex data analyses projects. This position plans and designs research methods, establishes data quality assurance procedures, and approves research results in support of the Office of Finance and Administration reporting requirements, including, but not limited to: State School Fund, School Finance Transparency and Accountability, Federal mandates and required reporting, state mandates and required reporting, and School Finance Data Visualizations.

Section 2b. 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:

The primary purpose of this position is to perform data collection, research, analysis, and provide support to Oregon's K-12 educational agencies around data use, research, and technical assistance in support of ODE's work to improve critical statistics and reporting based on research and data and promote educational equity. Responsibility extends to 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.

## 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.

### 30% - R E - Technical Work

- Write project proposals and research applications in support of Office of Finance and Administration (OFA) data and reporting needs, including but not limited to, the Program, Budgeting, and Accounting Manual modernization project and the updated Chart of Accounts.
- Review literature, national trends and state data to evaluate services and client outcomes in support of the OFA reporting requirements.
- Develop, plan, and execute data collections and related state and federal reports pertaining to OFA reporting requirements including data ownership and project management.
- Independently or in consultation with users identify areas of research and design research methodology to address programmatic needs of OFA.
- Establish data quality assurance and validation procedures.
- Develop and maintain documentation and presentations to explain program reporting requirements and related data collections to internal ODE staff, local education agencies, members of the Legislature, members of the State Board of Education, other state and federal agencies, education and community partners, and members of the public.
- Provide technical assistance to districts, schools, and ESDs submitting and validating data.
- Work with internal ODE staff, impacted education and community partners, and other state and federal agencies to establish and revise business rules as necessary.
- Design research-based methodology in support of the OFA reporting requirements (e.g., Program, Budgeting, and Accounting Manual (PBAM) modernization, including the updated Chart of Accounts (CoA) ) and plan, assign, check and manage the work of other research staff engaged in gathering, compiling, and analyzing information and data; this may include managing projects that include broad cross-functional team members and overseeing the daily activities of research staff assigned to projects.

- Plan and manage complex analytical or statistical research projects to advance the programmatic goals and objectives of OFA; this includes developing procedures that describe the series of steps to be taken by analysts, designing forms and survey instruments and data files to construct data sets for analysis and future study; and applying software to the complex analysis and writing programs utilizing statistical procedures based on assumptions and hypotheses in the research design; studying and analyzing tables, graphs, and charts, and other statistics to arrive at conclusions about the data; and reporting and presentation of technical research findings.
- Review changes in legislation and existing programming to ensure they remain aligned. Outline requirements for new systems or adjustments to existing programming to implement changes when necessary.
- Collaborate with FTU Business Intelligence staff to implement systematic repeatable processes to verify the quality and completeness of data collections.
- Collaborate with FTU Business Intelligence staff in planning, designing, and implementing new or enhanced information systems based on new and changing requirements as mandated by the Legislature; analyze user needs; conceptualize and develop specifications that include detailed design documents and technical specifications; develop documentation, manuals and training.
- At the discretion of the FTU, provide technical assistance to staff in other offices. This may include formal group trainings, one-on-one assistance, etc.
- Provide or arrange for technical training for team members and staff to build internal capacity around data literacy and deepen understanding of OFA reporting requirements.

### **30% - R E - Project Management**

- Design research-project methodology and plan, assign, check and manage the work of other research staff engaged in gathering, compiling and analyzing information and data.
- Provide or arrange for technical training for team members and staff.
- Manage projects that include broad cross-functional team members.
- Oversee the daily activities of research staff assigned to projects.

### **15% - R E - Accountability Reports and Visualization**

- Participate in unit/office/agency-level discussions and development to enhance current data reports and data visualization projects.
- Validate, analyze, and report data from various databases and files.
- Write statistical and narrative summary reports with audience appropriate language and content that explain the process used to collect data, how to interpret the results, and implications for the education system.
- Develop/contribute compelling graphics, charts, multimedia visuals, and data visualizations for use in public reports.

### **15% - R E - Research and Report Preparation**

- Independently plan and conduct major, analytical or statistical research projects as needed.
- Assist other state agencies, school districts, and other departments within the Oregon Department of Education by extracting data from ODE systems and/or researching statutes, administrative rules and agency policies.
- Write statistical and narrative summary reports, and articles for publication with audience appropriate language and content that explain the process used to collect the data, how to interpret the results and implications for the educational system.
- Extract and provide data as requested in accordance with the freedom of information act.

### **5% - R E - Planning, Design, and Analyses**

- Review new and existing Administrative Rules, evaluate for alignment with current Statute, policy, and legislative intent; draft new Administrative Rules or revisions, as necessary.
- Give policy direction during the interim period after Statute adoption but before the development of Administrative Rules.
- Draft new and revised policy and design operational systems to support current policy direction and mitigate operational risk while maintaining alignment with Oregon Regulatory Statutes and Administrative Rules, as well as new and existing Federal mandates.
- Facilitate and participate in workgroups comprised of agency staff and outside stakeholders to discuss practical implementation of agency policies, and Federal and State legislative mandates.
- Analyze new and existing policies and prepare/present audience appropriate guidance for agency staff, legislators, and the public.
- Analyze policy issues that cross or affect other departments or state agencies and develop proposals, policies, and strategies to address issues.
- Evaluate the quality and effectiveness of State and Federal mandate implementation and recommend strategic changes and priorities for allocating agency resources.

- Provide subject matter expertise in cross-agency workgroups, task force groups, and stakeholder committees.

5% - N NE - Other duties as assigned

## 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.**

- Fast-paced work, high volume inquiries
- Computer-based review and document development

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. Occasional travel for training and meetings that require automobile and overnight travel throughout the state, 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.**

Office 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; ODE Policies and Procedures, regulations regarding state school fund distribution, compulsory school attendance and residency, student performance standards, staff and class size procedures, special education requirements, and other areas as needed.

**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? |
|-----------------------------------------|----------------------------------------|-----------------------------|------------|
| Agency Staff                            | In Person, by mail, email or telephone | Provide technology services | Daily      |
| Public                                  | In Person, by mail, email or telephone | Provide technology services | As Needed  |
| School Districts                        | In Person, by mail, email or telephone | Provide technology services | As Needed  |
| State and Federal Agencies, Legislature | In Person, by mail, email or telephone | Provide technology services | As Needed  |
| Vendors                                 | In Person, by mail, email or telephone | Provide technology services | As Needed  |

## SECTION 7. POSITION RELATED DECISION MAKING

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

This position makes detailed analytic decisions that affect the reliability, validity, and value of the data used in education funding decisions. The person in this position must exhibit sound analytic application to real world issues, balanced judgement, and the ability to work with diverse staff members and management team members to ensure analysis provides basis for sound decisions regarding education finance based programs. This position must demonstrate ability to rapidly translate terms to nontechnical users and provide insights about how policies may impact timely distribution of the state's financial contribution to education.

## 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 | Regularly | 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:

Extensive knowledge of:

- Using/managing metadata for applications; Microsoft Office Suite; Data visualization software; Quantitative and qualitative problem-solving ability

General knowledge of:

- Generally Accepted Accounting Principles; Governmental Accounting Standards Board Standards

This position requires a driver's license and an acceptable driving record or an alternative means of transportation.

This position has been designated as sensitive in that the incumbent in this position has access to information technology systems that would allow the person in the position to harm the information technology systems or the information contained in the systems.

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 |
|----------------|-----------------|-----------|
|----------------|-----------------|-----------|

**SECTION 12. ORGANIZATIONAL CHART**

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

**SECTION 13. SIGNATURES**

|                   |               |
|-------------------|---------------|
| _____<br>Employee | _____<br>Date |
|-------------------|---------------|

|                  |               |
|------------------|---------------|
| _____<br>Manager | _____<br>Date |
|------------------|---------------|

|                               |               |
|-------------------------------|---------------|
| _____<br>Appointing Authority | _____<br>Date |
|-------------------------------|---------------|