



State of Oregon Position Description

Company: Oregon Department of Education
Organization: Deputy Director of Operations | Office of Finance & Administration - ODE
Service Type:

SECTION 1. POSITION INFORMATION

Job Profile Title:	Accounting Manager 3	Job Profile ID:	7033
Business Title:	Director Of Fiscal Transparency (Unfilled)	Position ID:	000000178789
Employee Name:		Company ID:	58100
Representation:	MMS	Budget Auth No:	1446614
Location:	Salem ODE Public Service Building		
Supervisor:	Aaron Rivera (Assistant Superintendent, Office of Finance)		
Position:			
Time Type:	Full Time		
FLSA:	Exempt		
Exempt Reason:	Executive Employee Exemption		
Overtime Eligible:	No		
Employee Type:	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 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 exists within the Office of Finance and Information Technology 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.

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:

The primary purpose of the Director of Fiscal Transparency is to lead and manage the state's fiscal transparency initiatives, which are designed to provide the legislature, school districts, and the public with comprehensive access to financial data from Oregon's public education system. This pivotal role involves overseeing accounting data integration, financial reporting, and audit alignment. The Director manages professional staff and collaborates with program leadership, IT teams, and district partners to ensure the development of accurate and accountable financial data systems, including dashboards and reporting tools. The work directly enhances the organization's commitment to transparency and accountability for all our stakeholders.

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.

35% - NC E - Accounting Oversight and Financial Reporting

The Director of Fiscal Transparency provides executive-level oversight and leadership of the statewide financial reporting architecture used by Oregon's K-12 education system. This includes the design, governance, and modernization of the Program Budget and Accounting Manual (PBAM) and the Uniform Chart of Accounts, both of which serve as the authoritative structure for reporting across approximately 197 school districts, 19 education service districts, and other subrecipients. The responsibilities include:

- Chart of Accounts Governance: Administers a multi-dimensional accounting framework used to classify every financial transaction reported by K-12 subrecipients. Dimensions include (but are not limited to): Fund (e.g., General Fund, Special Revenue, Debt Service); Function/Program (e.g., 1000–Instruction, 2000–Support Services, 3000–Enterprise); Object (e.g., 111 – Licensed Salaries, 215 – Health Benefits); Source of Revenue (e.g., 3100 – State School Fund, 4500 – Federal IDEA); Grant Identifier; Project/Location/Student Program Participation (under development); Manages tens of thousands of valid code combinations, and maintains combination control logic to ensure districts follow allowable crosswalks and reporting structures.
- Fund Accounting Oversight: Provides guidance on the application of governmental fund accounting principles to subrecipients and ensures correct use of major vs. non-major fund classification in audit reporting. Monitors how districts implement special revenue fund logic for grant tracking and categorical programs. Oversees fund-level budgeting, particularly as it relates to legal appropriation controls under Oregon Budget Law.
- Financial Data Collection and Reconciliation: Designs and implement statewide systems to collect, validate, and reconcile: Trial balances; Budget-to-actual reports; Balance sheets; Audit financial statement extracts. Oversees validation of key financial metrics, such as: Ending Fund Balance; Interfund Transfers (ensuring intra-fund balance); Restricted vs. unrestricted funds; Allowable indirect cost rates and fund balance levels; Audit alignment and Internal Control Monitoring. Coordinates reconciliation of district-submitted financial data to their audited financial statements, identifying discrepancies that trigger compliance actions. Develops controls to prevent and detect reporting of expenditures outside the grant's period of performance; improper use of fund types or objects (e.g., capital expenditures in the wrong fund); missing disclosures of transfers, adjustments, or prior period corrections.
- Provides accounting guidance to internal and external stakeholders based on: GASB standards; 2 CFR Part 200, Subpart F (Uniform Guidance); Oregon Administrative Rules (OARs); Modernization and System Integration. Leads cross-agency efforts to redesign the PBAM for improved auditability, data validation, and legislative insight. Incorporate grant and federal reporting requirements into the base chart of accounts to minimize dual reporting burdens. Pilot statewide adoption of trial balance data collection, XBRL tagging, and automated validations against the audit report.

- Collaborates with systems vendors (e.g., Infinite Visions, PowerSchool, Alio) and internal IT on building or modifying financial reporting modules, API-driven data pipelines, and automated exception reports.
- Oversees a financial architecture that manages billions in K–12 expenditures annually, encompassing: Over 300 object codes, 200 program/function codes, 150 source codes, and 50 fund types; Up to 20,000–40,000 valid accounting strings per district, depending on the level of federal and grant activity; Supports 197 districts, resulting in oversight of potentially 3 to 6 million financial line items per fiscal year, once expanded collections are fully deployed.

25% - R E - Strategic Leadership and Resource Management

The Director of Fiscal Transparency holds a pivotal role in shaping the organization's commitment to openness and integrity in financial matters through strategic planning and leadership.

- Develops a comprehensive fiscal transparency strategy that aligns closely with the organization's overarching goals and objectives. This involves a meticulous process of assessment, analysis, and formulation to address existing gaps and leverage opportunities for improvement.
- Collaborates closely with executive leadership and key stakeholders to ensure alignment between transparency objectives and broader strategic priorities.
- Sets clear and measurable objectives for the success of the fiscal transparency strategy.
- Establishes key performance indicators (KPIs) and benchmarks to track progress, providing a framework for monitoring and evaluation to enable informed decision-making and accountability, ensuring transparency efforts remain focused and results-driven.
- Manages staff who will produce fiscal transparency data dashboards, reports to the Legislature and Governor's offices, as well as information for the use at the school district and ESD level.

20% - R E - Transparency Systems and Tools

- Oversee the development and implementation of dashboards, reports, and data visualization tools using Power BI and other platforms. Ensure financial data is presented in user-friendly formats for schools, legislators, and the public.
- Manage a multifaceted process that begins with conceptualization and extends through to execution and refinement. Collaborating closely with cross-functional teams, including IT specialists, data analysts, and subject matter experts, the Director leads the design and development of user-friendly tools that transform complex financial data into accessible insights.
- Select and customize technology solutions tailored to the organization's unique needs and objectives. Draws upon expertise in data analytics and visualization platforms such as Power BI and Tableau to ensure the seamless integration of cutting-edge tools that empower stakeholders to explore and understand financial information with ease.
- Collaborates with other offices and agency data dashboard systems to ensure a seamless customer experience for those who want access to academic and/or program data, in addition to financial information.
- Works with IT teams to enhance technology infrastructure and capabilities, laying the groundwork for sustained transparency and innovation. By leveraging emerging technologies and best practices, this position drives continuous improvement in data visualization methodologies, enabling the organization to stay ahead of evolving trends and user expectations.
- Fosters a culture of collaboration and knowledge-sharing across departments to assist with initiative implementation. Cultivates cross-functional partnerships, facilitating dialogue and coordination among stakeholders to ensure alignment with organizational objectives and user needs.

10% - R E - Continuous Improvement

- Conducts systematic assessments of transparency initiatives, evaluating key performance indicators (KPIs), metrics, and benchmarks to gauge effectiveness and identify areas for improvement. This may involve analyzing user engagement metrics, usability testing results, and feedback surveys to gain a comprehensive understanding of user needs, preferences, and pain points.
- Leverages insights gleaned from assessments to identify opportunities to enhance the design, functionality, and usability of transparency tools and platforms, ensuring they remain intuitive, user-friendly, and aligned with the evolving needs of stakeholders.
- Remains attuned to emerging trends, advancements, and innovations in the field of financial transparency by monitoring developments in data visualization techniques, analytics methodologies, and technology platforms, as well as staying abreast of changes in regulatory requirements and industry standards.
- Incorporates cutting-edge practices and technologies into transparency initiatives to ensure the organization remains at the forefront of innovation, driving continuous improvement and delivering value to stakeholders. This may include developing or recommending new laws, rules, policies, or procedures to address emerging trends.

5% - NC E - Training and Capacity Building

- Provides a proactive approach to empowering staff members with the knowledge, skills, and competencies necessary to support the organization's commitment to financial openness and integrity.
- Recognizes that effective financial transparency initiatives require a workforce equipped with the requisite expertise and understanding. Spearheads efforts to provide comprehensive training and development opportunities tailored to the needs of staff members across various functional areas.
- Produces trainings and workshops for stakeholder groups as understand how to use the tools as they are deployed to the transparency website.

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.

Workload and priorities fluctuate and can involve highly complex, sensitive, and/or political issues. The work of this position is Fair Labor Standard Act exempt and frequently exceeds a 40-hour work week, often extending into evenings and weekends. Primarily office environment with regular use of a computer. May require extended hours during legislative sessions, audit cycles, or system implementation phases. This position relies upon collaborative, productive, professional and respectful engagement with staff, colleagues, leadership, and subject matter experts within the Agency, across other state agencies, representatives of local government and/or governor's office, with key investment members, partners, and providers within Oregon communities, and others.

Travel is a required component of this position, which may require sitting/driving for extended periods of time. The frequency of travel will vary and cannot be predetermined. The incumbent must adhere to all relevant policies and procedures, including the guidelines outlined in the DAS Oregon Accounting Manual 40.10.00. Travel for this position will include, but is not limited to, reporting to the office when there are business or operational needs. This may involve in-person meetings, presentations to the legislature, district visits, or other critical engagements as required. Any travel of this nature will be at the incumbent's own expense unless otherwise specified. This does not include attendance or participation in professional conferences. 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.

SECTION 5. GUIDELINES

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

- Governmental Accounting Standards Board (GASB)
- 2 CFR Part 200 (Uniform Guidance)
- Oregon Budget Law and Financial Administration Manual
- Oregon Accounting Manual
- Program Budget and Accounting Manual (PBAM)
- ODE internal policies and procedures
- Federal Rules, Laws, and Regulations
- Oregon Revised Statutes (ORSs) and Chapter Laws
- Oregon Administrative Rules (OARs)
- Current iteration of the Elementary and Secondary Education Act (ESEA); this is the Every Student Succeeds Act (ESSA) at present.
- Municipal Audit Law
- Statewide Financial Management System (SFMS) Manual
- Education Department General Administrative Regulations (EDGAR)
- Department of Administrative Services (DAS) policies

- SEIU Collective Bargaining Agreements
- Various Accounting and Financial Reports

How are these guidelines used?

To interpret, apply, and enforce financial compliance requirements; develop tools and templates; evaluate district financial reporting; and ensure accuracy and consistency in accounting structures and budget practices.

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?
District Business Managers	In Person, by mail, email or telephone	Clarify financial reporting, chart of accounts, budget-to-actuals	Weekly
Internal Executive Leadership	In Person, by mail, email or telephone	Strategic direction and approvals	Weekly
IT/Systems Teams	In Person, by mail, email or telephone	Data infrastructure and system development	Weekly
State Auditors and Contractors	In Person, by mail, email or telephone	Coordinate audit compliance and data integrity	Monthly

SECTION 7. POSITION RELATED DECISION MAKING

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

This position makes strategic decisions about financial data systems, accounting structure updates, compliance procedures, and staff assignments. These decisions directly affect the agency's public reporting credibility, compliance posture, and financial oversight of billions in K-12 funding.

The decision-making authority of the Director of Fiscal Transparency position encompasses a range of responsibilities aimed at guiding the organization's strategies and initiatives related to financial transparency. Key aspects of decision-making authority for this role include:

1. Strategic Planning: The Director will have authority to lead the development and implementation of a comprehensive fiscal transparency strategy aligned with the organization's overarching goals and objectives. This includes making decisions regarding the direction, priorities, and resource allocation for transparency initiatives.
2. Initiative Implementation: The Director will be responsible for overseeing the design and implementation of various initiatives aimed at the following:
 1. Enhancing fiscal transparency, such as developing dashboards, reports, and data visualization tools. This involves making decisions regarding the selection of technology solutions, methodologies, and best practices to effectively communicate financial information to stakeholders.
 2. Accountable for the financial reporting and accounting structure for all school districts, educational service districts, and public charter schools impacting the financial reporting related to outcomes for 550,000 students, and over 31,000 teachers.
 3. Resource Management: The Director will have authority to manage resources, including budgetary allocations and staffing, to support fiscal transparency efforts. This may involve making decisions regarding the allocation of funds for technology investments, staff training, and other initiatives aimed at promoting transparency and accountability.
 4. Compliance and Standards: The Director will ensure compliance with regulatory requirements and standards related to financial transparency and reporting. This includes making decisions regarding the interpretation and application of relevant regulations, as well as implementing internal controls and processes to ensure compliance.
 5. Education and Community Partner Engagement: The Director will have authority to engage with internal and external partners to solicit feedback, gather input, and address concerns related to fiscal transparency initiatives. This includes making decisions regarding communication strategies, engagement methods, and the dissemination of financial information.
 6. Continuous Improvement: The Director will be responsible for conducting regular assessments of existing financial reporting processes and identifying opportunities for improvement and optimization. This involves making decisions regarding process

redesign, technology enhancements, and other measures aimed at advancing transparency and efficiency.

Overall, the Director of Fiscal Transparency holds decision-making authority across various aspects of strategic planning, initiative implementation, resource management, compliance, stakeholder engagement, and continuous improvement to drive the organization's commitment to openness, integrity, and accountability in financial matters.

SECTION 8. REVIEW OF WORK

Job Profile	Position ID	How	How Often	Purpose of Review
Education Programs Administrator 3	0000122	In Person, by mail, email or telephone	Weekly	Oversight and alignment with agency priorities

SECTION 9. OVERSIGHT

What are the oversight activities for this position?

Plan Work
Assign Work
Approves Work
Responds to grievances
Disciplines and rewards
Coordinates schedules
Hires and discharges
Recommends hiring
Gives input for performance evaluations
Prepares & signs performance evaluations

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:

- CPA strongly preferred
- Master's of Accountancy preferred
- Knowledge of governmental fund accounting
- Expertise in financial systems, data reconciliation, and reporting
- Proficiency in Power BI or equivalent tools

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.

This position requires a driver 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 provides information technology services and has control over, or 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.

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

Employee

Date

Manager

Date

Appointing Authority

Date