

SANTA CLARA COUNTY OFFICE OF EDUCATION

CLASS TITLE: EDUCATOR PREPARATION PROGRAM ANALYST

BASIC FUNCTION:

Under the direction of the Executive Director, leads and participates in a variety of complex duties in support of the Educator Preparation Programs (EPP) department; assures the development and implementation of program components including the administration, coordination, and planning of the the development, allocation, and reporting of complex financial activities; advises and serves as an expert resource to EPP staff and leadership on program financial and business-related matters.

REPRESENTATIVE DUTIES:

The following duties are examples of assignments performed by incumbents in this classification. It is not a totally comprehensive list of duties, nor is it restrictive regarding job assignments.

ESSENTIAL DUTIES:

Administers, coordinates, and plans the development, allocation, and reporting of complex financial activities for the EPP department; analyzes data and anticipates the program needs.

Prepares and delivers verbal and written information related to fiscal documents and activities for EPP department leadership and department stakeholders such as Institutes of Higher Education (IHE), school districts, program candidates, the California Commission on Teacher Credentialing (CCTC) and the California Department of Education (CDE), as well as private scholarship donors.

Provides students with payment plans over the course of their program attendance; oversees student payments and the collection of tuition and fees; tracks student payments and coordinates the issuance of refunds as needed.

Analyzes CCTC certifications, grant budgets, EPP budget allocations, fiscal reports, and various revenue source reporting; coordinates with Internal Business Services to develop, prepare and update EPP revenue projections.

Provides strategic guidance to program leadership and staff regarding grant eligibility and fund development; creates grant related expenditure and projection reports; assists EPP program to align services with funding mandates and priorities.

Coordinates with Internal Business Services to ensure the distribution of grant funds to districts and IHEs as well as program students/candidates; prepares spreadsheets to track the distribution of CCTC and CDE grants to individual districts and appropriate stakeholders; prepares and files CCTC and CDE expenditure reports; collects related expenditure information from district programs and other stakeholders for in-kind matching funds.

Develops contract language for MOU partnerships; collaborates with appropriate SCCOE personnel to process contracts, timesheets, MOUs, IOSAs, RFPs, and letters of agreement as they relate to budget and EPP fiscal responsibilities.

Researches, analyzes, interprets, and assures County Office, districts and IHE partners are in compliance with Education Code, laws, and regulations; determines data needs for various financial reports; tests validity of collected data; reconciles EPP financial revenue reports.

Develops, monitors and revises budget based on program needs; analyzes, revenue projections and allocation plans, and advises school districts and students/candidates of financial implications; reconciles credit card statements; processes and codes purchase orders and invoices; arranges for billings and payments related to grant activity and revenue collection.

Researches and analyzes funding data; resolves problems, and develops worksheets and reports as needed; reviews EPP certification documents.

Analyzes program data to assist in the development and implementation of short-term and long-term plans to meet departmental financial goals; provides financial data for long-term planning in department; participates in decisions that frequently have major impact across EPP programs, and stakeholders.

Tracks grant-funded students as they leave the program to ensure they remain in teaching for their committed time period; follows-up with those who leave the profession to collect expended grant funds.

Plans, directs, and monitors special projects; confers with business services; advises and answers financial questions for school districts and students/candidates related to EPP funding; leads and facilitates discussions between stakeholders related to EPP funding.

Maintains current knowledge of laws, rules, regulations, and policies related to EPP grants and funding sources; interprets and analyzes CCTC, CDE and SCCOE policies and regulations; directs and participates in the analysis of MOU and IOSA agreements and disseminates information on the impact of grant legislation; provides program leadership with periodic information regarding EPP funding and revenue sources.

Establishes and maintains a variety of correspondence, records, and files related to assigned activities; responds to telephone and email questions regarding EPP fiscal questions; meets with administrators and program managers as needed to provide direction and technical and procedural assistance.

Develops complex spreadsheets for revenue projections; serves as information source regarding fiscal procedures, policies, requirements, and standards for EPP programs.

OTHER DUTIES:

Performs related duties as assigned.

KNOWLEDGE AND ABILITIES:

KNOWLEDGE OF:

Recent developments, current literature, and sources of information regarding budgeting and financial record systems.

Federal, State and grantor regulations relevant to program operations.

Preparation methods for reports, summaries, and presentations.

Budget, and business functions of an educational organization.

Financial and statistical record-keeping techniques.

Basic math.

Modern office practices, procedures, methods, and equipment.

Correct English usage, grammar, spelling, punctuation, and vocabulary.
Oral and written communication skills.
Interpersonal skills including tact, patience, and courtesy.

ABILITY TO:

Perform specialized and technical services requiring application and interpretation of data, facts, procedures, and policies.
Provide functional and technical guidance in obtaining, preparing, sharing, and exchanging data with outside agencies and administrative, technical, clerical personnel.
Prepare and monitor various program records and reports.
Interpret, apply, and explain rules, regulations, policies and procedures.
Operate a computer and assigned software to enter data, maintain records and generate reports.
Evaluate projected revenue and expenditures to assist in budget development.
Maintain accurate records.
Analyze financial data and prepare reports, forecasts, and recommendations.
Apply basic mathematical skills.
Work independently with little direction.
Meet schedules and timelines.
Plan and organize work.
Communicate effectively both orally and in writing.
Prepare and deliver oral presentations.
Establish and maintain cooperative and effective working relationships with others.

LEADERSHIP TEAM COMPETENCIES:

Develops and fosters effective individuals and teams.
Operationalizes the organizational vision, mission, goals, shared values, and guiding principles.
Demonstrates emotional intelligence.
Models inclusive, effective, and authentic communication.
Applies knowledge of the intersectionality of race, equity, and inclusion.
Builds and sustains positive, trusting relationships.
Conducts SCCOE operations with the highest moral, legal, and ethical principles.

EDUCATION AND EXPERIENCE:

Any combination equivalent to: Bachelor's degree in business administration or related field and three years administrative experience performing duties related to budgeting and the preparation and analysis of financial reports.

LICENSES AND OTHER REQUIREMENTS:

Valid California driver's license.

WORKING CONDITIONS:

ENVIRONMENT:

Office environment.

PHYSICAL DEMANDS:

- Dexterity of hands and fingers to operate a computer keyboard.
- Seeing to read a variety of materials.
- Hearing and speaking to exchange information.
- Bending at the waist, kneeling, or crouching to retrieve and file materials.
- Sitting for extended periods of time.

Approved by Personnel Commission: September 14, 2022

Revised: 11/9/22



Marisa Perry
Director III – HR / Classified Personnel Services

Date: 11/9/22