

## SANTA CLARA COUNTY OFFICE OF EDUCATION

### **CLASS TITLE: PROGRAM ANALYST**

#### **BASIC FUNCTION:**

Under assigned direction, leads and participates in a variety of complex duties in support of an assigned department or division; assures the development and implementation of program components including the administration, coordination, and planning of the development, allocation, and reporting of complex financial activities, which may include grants and contract management; advises and serves as an expert resource to staff and leadership on program financial and business-related matters and grant budgeting.

#### **REPRESENTATIVE DUTIES:**

The following duties are examples of assignments performed by incumbents in this classification. It is not a 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 department or division; analyzes data and anticipates the program needs.

Prepares and delivers verbal and written information related to fiscal documents and activities for department and division leadership and stakeholders.

Analyzes certifications, grant budgets, budget allocations, fiscal reports, and various revenue source reporting dependent on the needs of the assigned department or division; coordinates with Internal Business Services to develop, prepare and update revenue projections.

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

Coordinates with Internal Business Services to ensure the distribution of grant funds to recipients; prepares spreadsheets to track the distribution of grants to individual districts and appropriate stakeholders; prepares and files 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 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 financial revenue reports.

Develops, monitors and revises budget based on program needs; analyzes revenue projections and allocation plans, and advises appropriate parties of financial implications, as needed; 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 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 various grants.

Plans, directs, and monitors special projects; confers with business services; advises and answers financial questions related to program funding.

Maintains current knowledge of laws, rules, regulations, and policies related to grants and funding sources; interprets and analyzes related 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 grant 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 an information source regarding fiscal procedures, policies, requirements, and standards.

May provide grant program participants with payment plans as appropriate; oversees payments and the collection of fees; tracks payments and coordinates the issuance of refunds as needed.

Tracks grant participants as required; follows-up and collects expended grant funds as needed.

**OTHER DUTIES:**

Performs 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

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Marisa Perry  
Director III – HR / Classified Personnel Services

Date: 11/8/23