

☒ **PROPOSED**

☐ **CURRENT**

## DUTY STATEMENT

Note: Shaded area is for Personnel Office use only.

PERSONNEL REQUEST NO.		EFFECTIVE DATE
DIVISION <b>Audits and Investigations Division</b>	POSITION NUMBER (Agency – Unit – Class – Serial) <b>174 – 025 – 2898 –</b>	
UNIT <b>Fiscal Monitoring Unit</b>	POSITION CONTROL NO. <b>PC0071</b>	
INCUMBENT	CLASS TITLE <b>Education Fiscal Services Consultant</b>	
<b>Briefly (1 or 2 sentences) describe the position's organizational setting and major functions.</b>		
Under the direction of the Education Fiscal Services Administrator, Audits and Investigations Division, the Education Fiscal Services Consultant (EFSC) works with local education agencies (LEAs) and Community Based Organizations (CBOs) to ensure the state is meeting its obligation to provide subrecipient oversight, monitor fiscal program compliance, and ensure the timely resolution of LEA corrective actions relating to the Expanded Learning Opportunity (ELO) funded programs. The position advises and assists LEAs and CBOs in strengthening and improving its fiscal program management practices. The person in this position is considered an expert in the area of school district accounting, budgeting, and reporting policies and procedures, and how these issues relate to and affect the delivery of education programs and services to students.		
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. <b>(Use additional sheet if necessary)</b>	
50%	Independently conduct high risk fiscal monitoring reviews of LEAs and CBOs in conjunction with the federal program monitoring process utilizing the California Monitoring Tool (CMT). Prepare oral or written reports of work accomplished to management delineating review objectives, scope of work performed, significant fiscal or program deficiencies, and make recommendations for resolving identified issues and problems. Consult with LEAs and CBOs to upgrade the fiscal skills of business officials, program administrators, and school site councils. Advise and assist the LEAs and CBOs in strengthening and improving program fiscal management practices in the areas of program accounting, budgeting, and reporting. Follow-up with LEAs and CBOs to ensure corrective action plans are developed and implemented in a timely manner.	
20%	Work closely with LEAs and CBOs to provide fiscal guidance and technical assistance and training on the proper expenditure of ELO program funds. Identify and make recommendations for resolving educational funding issues. Consult with CDE management, LEAs and CBOs in the development of mechanisms, tools, policies, and procedures to implement the fiscal accountability aspects of federal laws, regulations, and guidelines applicable to LEAs and CBOs, to ensure the state is meeting its obligation to monitor program compliance and/or implement the provisions for more effective and efficient program operations. Meet and consult with CDE, LEA, and CBO staff to develop policies, procedures, and report forms, and work with LEAs and CBOs to implement the requirements.	
15%	Confer with federal and state agencies including the U. S. Department of Education, Department of Finance, California State Auditor, and other program offices and LEAs receiving ELO program funds; work with CDE's Legal Office, and program offices in resolving fiscal program non-compliance; participate in training for entities receiving funds and other policy or decision-making meetings. Participates in meetings with management and others to keep staff apprised of projects and potential problems, making recommendations as necessary.	
10%	Develop and present training to LEAs, CBOs, and CDE program staff to provide technical assistance in the area of fiscal regulatory requirements of entities receiving ELO program funding.	
5%	Participate in staff meetings; assist other staff with critical projects as needed; and perform other job-related duties as required.	

POSITION NUMBER (Agency – Unit – Class – Serial)

**174 – 025 – 2898 –**

**To be reviewed and signed by the supervisor and employee:**

**Supervisor's statement:**

- *I have discussed the duties and responsibilities of the position with the employee*
- *I have signed and received a copy of the duty statement.*

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE



**Employee's statement:**

- *I have discussed the duties and responsibilities of the position with my supervisor*
- *I have signed and received a copy of the duty statement*

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE



*Distribution:*

*Original: Official Personnel File*

*Copy: Supervisor*

*Copy: Employee*

*Copy: Program File*

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PERSONNEL REQUEST NO.		EFFECTIVE DATE
DIVISION <b>Audits and Investigations Division</b>	POSITION NUMBER (Agency – Unit – Class – Serial) <b>174 – 025 – 2897 –</b>	
UNIT <b>Fiscal Monitoring Unit</b>	POSITION CONTROL NO. <b>PC0071</b>	
INCUMBENT	CLASS TITLE <b>Education Fiscal Services Assistant</b>	
<b>Briefly (1 or 2 sentences) describe the position's organizational setting and major functions.</b>		
<p>Under the general supervision of the Education Fiscal Services Administrator (Administrator), Audits and Investigations Division, the Education Fiscal Services Assistant (EFSA) works with local education agencies (LEAs) and Community Based Organizations (CBOs) to ensure the state is meeting its obligation to provide subrecipient oversight, monitor fiscal program compliance, and ensure the timely resolution of LEA corrective actions relating to the Expanded Learning Opportunity (ELO) funded programs. The EFSA advises and assists LEAs and CBOs in strengthening and improving its fiscal program management practices. The person in this position is considered an expert in the area of school district accounting, budgeting, and reporting policies and procedures, and how these issues relate to and affect the delivery of education programs and services to students.</p>		
% of time performing duties	Indicate the duties and responsibilities assigned to the position and the percentage of time spent on each. Group related tasks under the same percentage with the highest percentage first. <b>(Use additional sheet if necessary)</b>	
50%	Conduct and assist with medium to high risk fiscal monitoring reviews of LEAs and CBOs in conjunction with the federal program monitoring process utilizing the California Monitoring Tool (CMT). Prepare oral or written reports of work accomplished to management delineating review objectives, scope of work performed, significant fiscal or program deficiencies, and make recommendations for resolving identified issues and problems. Consult with LEAs and CBOs to upgrade the fiscal skills of business officials, program administrators, and school site councils. Advise and assist the LEAs and CBOs in strengthening and improving program fiscal management practices in the areas of program accounting, budgeting, and reporting. Follow-up with LEAs and CBOs to ensure corrective action plans are developed and implemented in a timely manner.	
20%	With oversight from the Administrator, work closely with LEAs and CBOs to provide fiscal guidance and technical assistance and training on the proper expenditure of ELO program funds. Identify and make recommendations for resolving educational funding issues. Consult with CDE management, LEAs and CBOs in the development of mechanisms, tools, policies, and procedures to implement the fiscal accountability aspects of federal laws, regulations, and guidelines applicable to LEAs and CBOs, to ensure the state is meeting its obligation to monitor program compliance and/or implement the provisions for more effective and efficient program operations. Meet and consult with CDE, LEA, and CBO staff to develop policies, procedures, and report forms, and work with LEAs and CBOs to implement the requirements.	
15%	With oversight from the Administrator, confer with federal and state agencies including the U. S. Department of Education, Department of Finance, California State Auditor, and other program offices and LEAs receiving ELO program funds; work with CDE's Legal Office, and program offices in resolving fiscal program non-compliance; participate in training for entities receiving funds and other policy or decision-making meetings. Participates in meetings with management and others to keep staff apprised of projects and potential problems, making recommendations as necessary.	
10%	Develop and present training to LEAs, CBOs, and CDE program staff to provide technical assistance in the area of fiscal regulatory requirements of entities receiving ELO program funding.	
5%	Participate in staff meetings; assist other staff with critical projects as needed; and perform other job-related duties as required.	

POSITION NUMBER (Agency – Unit – Class – Serial)

**174 – 025 – 2898 –**

**To be reviewed and signed by the supervisor and employee:**

**Supervisor's statement:**

- *I have discussed the duties and responsibilities of the position with the employee*
- *I have signed and received a copy of the duty statement.*

SUPERVISOR'S NAME (Print)

SUPERVISOR'S SIGNATURE

DATE



**Employee's statement:**

- *I have discussed the duties and responsibilities of the position with my supervisor*
- *I have signed and received a copy of the duty statement*

EMPLOYEE'S NAME (Print)

EMPLOYEE'S SIGNATURE

DATE



Distribution:

Original: Official Personnel File

Copy: Supervisor

Copy: Employee

Copy: Program File